



MOVING



THE

MIDDLE



Oxfam's Behind the Brands
assessment of the
global agribusiness sector



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EXECUTIVE SUMMARY

Global agribusinesses represent a crucial part of the food system, commanding a ‘mighty middle’ position in various value chains around the world. They act as connectors between farmers and agricultural workers on one side and food consumers on the other. As traders and processors of agricultural commodities, they supply food manufacturers, retailers, governments and food aid agencies. They serve as buyers, landowners, agricultural producers, transportation providers, biofuel manufacturers and providers of financial services in commodity markets. They have an outsized role and influence on how food is made and who benefits most from its production. In recent years, they have also made record profits while hundreds of millions struggle with the rising costs of food.¹

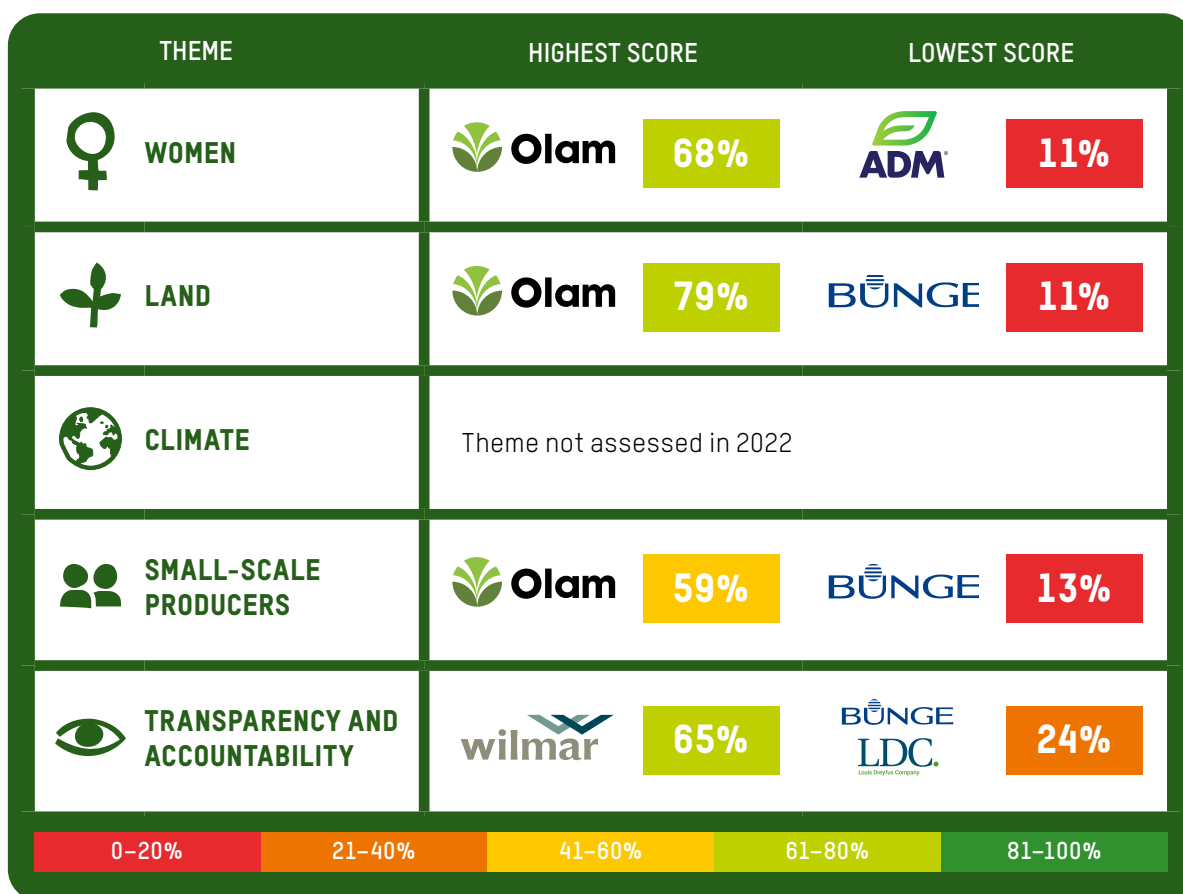
Oxfam’s agribusiness scorecard is a benchmarking tool that measures global agribusinesses’ policies and implementation plans on five issue areas: women’s economic empowerment, land, climate change, small-scale producers, and transparency and accountability. Oxfam selected seven companies – Archer Daniels Midland (ADM), Barry Callebaut, Bunge, Cargill, Louis Dreyfus Company, Olam Group and Wilmar International – due to the size and scale of their sourcing volumes of key food commodities, including cocoa, sugar, soy, rice and palm oil, among others.

Above: Juliana Sic, 63, arranges soil bags for coffee seedlings. In Guatemala, Oxfam partners Corazón de Maiz and ASEDECHI are introducing drought-resistant crops and farming techniques, as well as alternative sources of income, to help farmers in the Dry Corridor adapt to the climate crisis. Photo: © James Rodriguez/Oxfam

The scorecard measures each of these companies’ awareness, action and advocacy by looking at their policies, implementation plans and public statements. It is important to recognize that while this does gauge where companies’ intentions lie, it does not fully measure the impact of these actions on farmers and workers, which would require additional assessments using a different set of methodologies, such as worker surveys or community-based human rights impact assessments.

This report discusses the findings from the third agribusiness scorecard, comparing results from 2018, 2020 and 2022. It examines where some of the largest and most important global agribusinesses stand when it comes to key environmental, social, and governance (ESG) policies and action plans in their operations. Within each issue area, the report highlights notable policy developments and current issues.

Figure 1. Overview scorecard



The findings show mixed results, with average scores still well below what is necessary to sustain a just food system. While the sector has shown some improvement over the four years analyzed, there is still much work to be done. The divide between leaders and laggards grew. Most companies at the bottom of Oxfam’s initial findings in 2018 showed only modest improvements by 2022. Overall, the sector needs to do more to integrate sustainable businesses practices that respect human rights throughout their operations, addressing power imbalances – particularly when it comes to small-scale food producers.

Key findings



WOMEN'S ECONOMIC EMPOWERMENT

AVERAGE SCORE: 38%

- Barry Callebaut, Cargill and Olam Group have signed on to the UN Women's Empowerment Principles.²
- Olam Group and Wilmar have multi-year, time-bound action plans to advance women's economic empowerment in their supply chains.
- Only three companies – Cargill, Olam Group, and Wilmar – track the gender profile for at least one of their supply chains



LAND RIGHTS AND LAND INEQUALITY

AVERAGE SCORE: 39%

- No companies publicly identify countries in their supply chains where land tenure risk is particularly high.
- No companies have developed a credible action plan to mitigate land risks and confront impacts across all its high-risk commodity sourcing.
- All the companies have policies that incorporate free, prior and informed consent (FPIC) that covers at least one high-risk commodity.



CLIMATE CHANGE

NO SCORES AVAILABLE

Oxfam made the decision not to include climate scores in this report based on a number of factors, including new guidance from the Science Based Targets Initiative (SBTi) and the United Nations High-Level Expert Group on the Net-Zero Emissions Commitments of Non-State Entities (HLEG), which was released after the cutoff date for our assessment.

We did not feel that the indicators in previous editions of the scorecard met the urgency of the climate crisis today, nor did they take new guidance into account. As most of the seven agribusinesses report their greenhouse gas (GHG) emissions targets through SBTi, Oxfam recognizes that the recently released SBTi Forest, Land, and Agriculture (FLAG) guidance should play a role in developing updated targets which would not be assessed in this scorecard due to our publication timeline. We also expect that companies will take into consideration guidance from the HLEG, released at COP27.

Oxfam plans to publish an independent evaluation of the global agribusiness sector's climate targets around COP28 this year. We hope this will give the sector time to make public their updated GHG emissions targets, as well as robust zero deforestation policies that cover all their supply chains.



FARMER EQUITY FOR SMALL-SCALE PRODUCERS

AVERAGE SCORE: 34%

- No company recognizes the importance of contract transparency (clear, accessible terms to all parties) despite how critical this is to farmers.
- None measure and disclose the share of value going to small-scale producers.
- Just one company, Olam Group, has committed to setting a living income target based on the Living Income Community of Practice’s definition for at least one commodity.
- None have an explicit commitment to ensuring fair, transparent, stable and long-term sourcing relationships.



TRANSPARENCY AND ACCOUNTABILITY

AVERAGE SCORE: 39%

- All the companies now disclose supplier-level information for their palm oil supply chain, but none list the same information for soy.
- All the companies now disclose which governance structure (e.g., Board sub-committee) has responsibility for the oversight of human rights and discloses its reports and statements.
- Barry Callebaut is the only company that identifies and discloses salient human rights risks across its supply chains, regularly reporting trends over time.

Oxfam’s findings support the argument that more scrutiny is needed of a sector which has been overly opaque for decades. At a time of record profits, global agribusinesses must invest more in adopting policies and systems that ensure how they conduct business works for the many, not the few. While setting policy is an important step, it is only part of a journey that must include measuring the impact of those policies. Given their position within the supply chain, global agribusinesses can directly affect farmers and farm workers. They have an internationally recognized responsibility to respect human rights and to contribute as a net positive actor in the growing climate crisis. The sector must work to transform its business practices to mitigate the exploitation of people and destruction of vital habitats.

The report concludes with key recommendations for the agribusiness sector, downstream companies and investors. Individualized company scorecards and recommendations are provided in the [annex](#).

Oxfam’s findings support the argument that more scrutiny is needed of a sector which has been overly opaque for decades.

INTRODUCTION

Food tells many stories. It is at the center of a society's sustenance, as well as its cultural expression. Food has supported the livelihoods of billions of people for generations. It supplies vast industries of processors, manufacturers, restaurateurs, and retailers, supported by logistics networks stretching to nearly all corners of the planet. In short, food is fundamental to the fabric of humanity.

Tragically, food is also a story of suffering. Hunger and famine have always been part of human existence. In 2021, an estimated 828 million people in the world still suffered from hunger – almost one-tenth of the global population.³ Communities all over the world have suffered from varying levels of malnutrition. Colonial models of economic development saw millions displaced from their land, enslaved and forced to work under brutal conditions. Entire ecosystems have been uprooted or destroyed to make way for agricultural development to feed and provide fuel for growing populations.

Emerging from this history, the current food system tells a story of crisis. Compounding disasters – a global pandemic, war, inflation, and a worsening climate crisis – have brought food producers and those who rely on them to the brink. Food prices have increased exponentially across the world. Global fertilizer prices have risen nearly 30% since the start of 2022, following an 80% surge in 2021.⁴ Farmers, especially small-scale producers who grow food as cash crops, are squeezed by these market conditions.

The cost of food is increasing, and not just in terms of prices. The food system comes with great social and environmental costs. Farmers and agricultural workers face poverty and hunger. They may work under inhumane conditions that involve forced and bonded labor, and some may be child laborers. Their land is increasingly under threat as industrial forms of agriculture and competing needs for infrastructure, including housing, and land-based climate solutions have changed land use patterns dramatically. Deforestation and the climate crisis are creating more risks for farmers already facing dire circumstances. Women and girls often face the brunt of these challenges.

Food billionaires saw their collective wealth increase by 45% over the past two years



Underlying these circumstances is the growing, unchecked inequality that has come to characterize our global economic system. Corporations see their profits rise while global poverty continues to increase. Billionaires involved in the food and agribusiness sector have seen their collective wealth increase by 45% between 2020 and 2022.⁵ Sixty-two new food billionaires have been created in the sector since the start of the COVID-19 pandemic,⁶ while many farmers and workers are struggling to keep up with inflation.

The role of agribusinesses in global value chains

Global agribusinesses, also known as agri-commodity traders, play a vital role in the food system. They command a ‘mighty middle’ position in value chains, linking upstream commodity producers with downstream customers in the manufacturing, retail and hospitality sectors (Figure 2).

In some cases, they act simply as traders, buying and selling commodities on the open market. In others, they process agricultural goods into additional inputs that make up the components of various food and non-food products, including biofuels. In others still, they are farm owners or managers. Given this place within the value chain, they work as a key connection between farmers and workers on the one side and consumers on the other.

Figure 2. The high market concentration in food supply chains



Note: Input companies refers to those that manufacture essential inputs into agricultural production, such as seeds and fertilizers.

The business model of global agribusinesses often relies on large volumes to make up for small margins. As a result, they may wield a high market share in a given commodity. Just four companies – ADM, Bunge, Cargill and Louis Dreyfus – control 70% of the world’s trade in agricultural commodities in terms of value.⁷ Certain commodities, such as cocoa, show similar levels of concentration, with just three companies – Barry Callebaut, Cargill and Olam Group – accounting for a clear majority of cocoa bean grinding and processing. It has been reported that one company, Wilmar, supplies up to 40% of the world’s palm oil.⁸ This unequal distribution of market share and power leads to small producers earning significantly less than large processors, retailers and exporters.⁹

Food profits for the agribusiness sector have been rising over the past two years at a fast pace (Box 1). Cargill, one of the world’s biggest agribusinesses and the largest privately-held company in the United States, reported net profits of \$6.68bn in its most recent fiscal year, a 35% increase in just one year.¹⁰ The Cargill-MacMillan family, who own a majority stake in the company, have a collective net worth of over \$40bn.¹¹ Margarita Louis-Dreyfus, the billionaire heir of another influential agribusiness, Louis Dreyfus Company, received \$457m in 2022 from dividends and share sales.¹²

In addition to their economic might, global agribusinesses have an internationally recognized responsibility to conduct their practices in ways that respect human rights and protect the environment. The United Nations Guiding Principles on Business and Human Rights (UNGPs) states that companies, including agribusinesses, must take actions to ensure the prevention, mitigation and remediation of human rights abuses.¹³ Additionally, companies must play a role in achieving the UN Sustainable Development Goals (SDGs) by 2030. Increasingly, governments are choosing to regulate human rights due diligence and corporate action (for example, the European Commission's Corporate Sustainability Due Diligence Directive). All signs point to these regulations increasing in the future, creating additional accountability mechanisms that will apply to the global agribusiness sector.

Box 1. The global food crisis

Food prices have skyrocketed from 2020 to 2022.¹⁴ The import prices of agricultural inputs have increased by almost 50% from 2021 to 2022.¹⁵ Climate change has brought drought and other natural disasters at increasing rates. Hundreds of millions of people are facing hunger and are at risk of famine, especially women and children. Those who earn a living from food and agriculture are struggling to keep up with rising costs while laboring under brutal working conditions and suffering from unequal footing in global markets.

In stark contrast, food profits for multinational corporations are at record highs. Oxfam estimates that billionaires in the food and agribusiness sector have seen their collective wealth increase by 45% between 2020 and 2022, with 62 new food billionaires created in the sector since the start of the COVID-19 pandemic.¹⁶ This is especially true for global agribusinesses. Some of the world's biggest agribusinesses have seen record or near-record profits over the past two years.¹⁷ Financial institutions and speculation also play a role in market volatility.¹⁸

Despite its touted productivity, industrialized agriculture has not solved global hunger. The magnitude and severity of acute food insecurity has reached alarming levels, affecting at least 205 million people in 2022.¹⁹ Oxfam estimates that across Ethiopia, Kenya and Somalia, one person is likely dying every 36 seconds from acute hunger linked to conflict, COVID-19, the climate crisis, and inflationary and market pressures accelerated by the conflict in Ukraine.²⁰ People in wealthy countries are also facing increased hunger. The proportion of people in the US who do not have enough to eat rose from 7.8% in August 2021 to 11.9% in July 2022.²¹

While this report does not focus on the role of global agribusinesses in the food crisis, it does look at certain policies that have the potential to reduce a company's impact on the dynamics fueling the food crisis. Companies with better climate policies, for example, will help reduce the worst effects of climate change, a key driver of declining yields. Similarly, farmers who receive a living income will be better positioned to absorb the rising costs of food and inputs. Given that these companies are setting record profits, now is the time to invest more in robust environmental, social and governance (ESG) practices that have the potential to help farmers and communities in global agribusiness supply chains become more resilient to shocks.

Oxfam's Behind the Brands initiative and the agribusiness sector

For decades, Oxfam has prioritized engagement with the food sector, recognizing the direct role multinational actors play in sustaining food systems. Challenging food and beverage companies to improve their performance and collaborating where there are opportunities to develop socially and environmentally sustainable business models have been core foci of Oxfam's work. Food and beverage companies' ability to deliver on policies and action plans to address issues like land rights and women's economic empowerment depends on the strength of their suppliers' efforts and their systems to track performance. Suppliers are the sector closest to the right holders – farmers, workers and agricultural communities – on whom the global food system depends.

Oxfam recognized the need to focus on suppliers as part of its Behind the Brands initiative, publishing in 2019 its first assessment of seven agribusinesses – Archer Daniels Midland (ADM), Barry Callebaut, Bunge, Cargill, Louis Dreyfus Company, Olam Group and Wilmar International. These agribusinesses were chosen because of their ties to food and beverage companies, their significance to trade in high-risk commodities like soy, cocoa, rice, and palm oil, as well as their importance in lower-income countries that are dependent on food and agricultural exports. Oxfam's report, *Companies Spoke. Did Their Suppliers Listen?* included the first agribusiness scorecard.²² A second edition was published in 2021.²³

This report looks at the results of the third and final agribusiness scorecard. The analysis aims to inform the sector, their investors, and other stakeholders of how these companies' level of ambition on some of their most material ESG issues has changed over the course of four years. The report concludes with recommendations for companies and investors, as well as trends Oxfam is tracking to chart the future of its work on corporate accountability in the food and beverage and agribusiness sectors.

The agribusiness scorecard

The agribusiness scorecard measures the performance of seven agribusinesses on responsible business practices. It analyzes companies' commitments to addressing human rights and environmental concerns across five thematic areas that are all material to the agribusiness sector: women, land, climate, small-scale producers, and transparency and accountability.

THE FIVE THEMES:



WOMEN



LAND



CLIMATE



SMALL-SCALE PRODUCERS



TRANSPARENCY AND ACCOUNTABILITY

Oxfam developed the agribusiness scorecard by incorporating elements of both the Behind the Brands and Behind the Barcodes scorecards,²⁴ which measured downstream food manufacturers and retailers, respectively. The aim of using scorecards is to incentivize a 'race to the top' by comparing performance across a given sector. The first edition of the agribusiness scorecard assessment took place in 2018 and was published in 2019, with a second edition conducted in 2020 and a third in 2022.

Box 2. Missing scores, missing action: why we removed climate from our 2022 scorecard

Oxfam made the decision not to include climate scores in its 2022 scorecard assessment. This was based on several factors, including new guidance from the Science Based Targets Initiative (SBTi) and the United Nations which were released after the cutoff date for our assessment.

Oxfam developed the climate indicators in 2018 and updated them in 2020 in line with stricter criteria needed to meet the growing urgency of the climate crisis. While average scores increased between the two editions, it is important to note that climate targets and their implementation must keep up with the rapidly changing science to avert the worst effects of climate change.

Since the adoption of the Paris Agreement in 2015, the world has seen an increasing number of net-zero commitments from many non-state actors including the private sector. The growth in pledges has been accompanied by a proliferation of criteria and benchmarks to set net-zero commitments with varying levels of robustness. As a response to this, the United Nations Secretary-General, António Guterres, established a High-Level Expert Group on the Net-Zero Emissions Commitments of Non-State Entities (HLEG) to develop stronger and clearer standards for net-zero emissions pledges. Companies are expected to deliver transparent climate action plans taking these recommendations of the HLEG as guiding principle and to submit them before the end of this year.

We do not feel that Oxfam's original indicators meet that urgency today, nor did they take new guidance into account. As most of the seven agribusinesses report their GHG emissions targets through SBTi, Oxfam recognizes that the recently released SBTi Forest, Land, and Agriculture (FLAG) guidance should play a role in developing updated targets which would not be assessed in this scorecard due our publication timeline. We also expect that companies will take into consideration guidance from the UN HLEG that was released at COP27.

Oxfam plans to publish an independent evaluation of the global agribusiness sector's climate targets around COP28 in 2023. In line with their own commitment, six of the seven agribusinesses agreed to report progress by COP28.²⁵ We hope this will give the sector time to make public their updated greenhouse gas (GHG) emissions targets, as well as robust zero deforestation policies that cover all their supply chains.



How Oxfam measures the agribusiness sector

The agribusiness scorecard is structured to measure performance at various levels across each of the five themes.

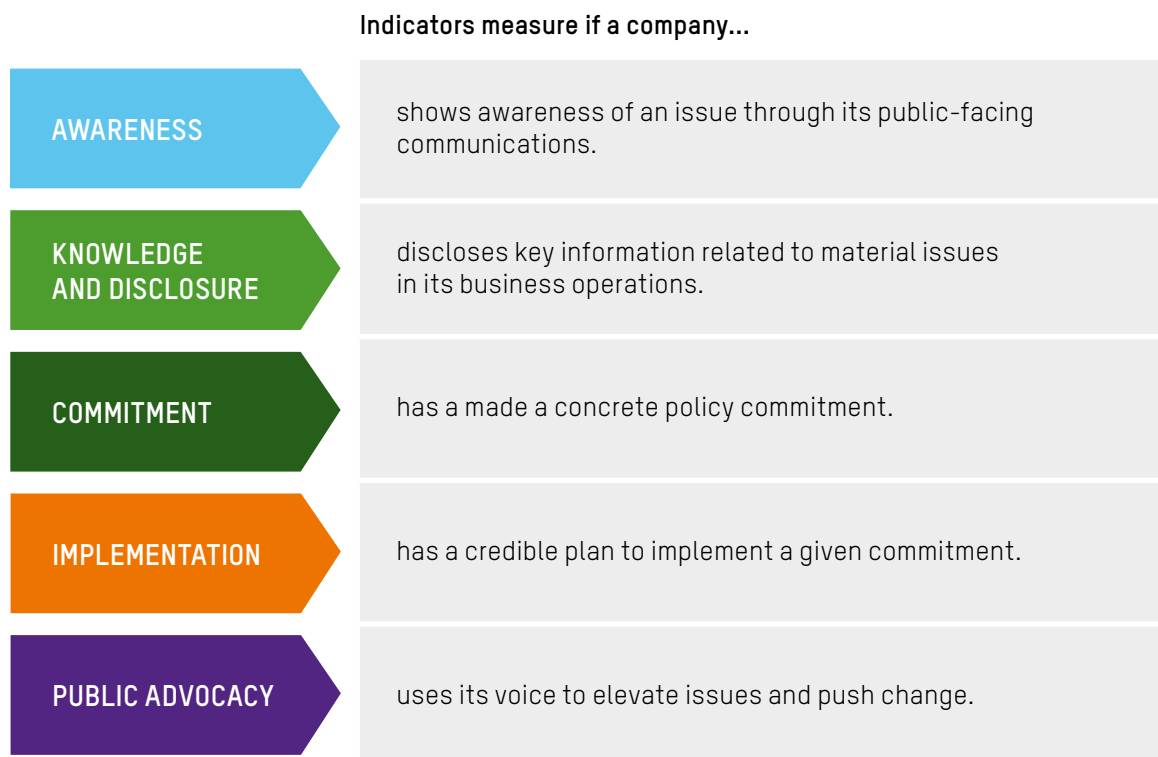
To start, addressing business and human rights challenges first requires awareness, which companies reflect through their public-facing communications. They show a further level of engagement through disclosures of material issues.

Next, they move into making commitments that demonstrate their desire to shift business practices. To be credible, these commitments must incorporate transparent and measurable implementation plans, including regular reporting to assess progress.

Finally, companies should speak out on systemic drivers of injustice and inequality to drive sector-wide change.

Above: Lucas Aldana is a farmer who lives in Caparrosa, Guatemala. His crops of corn and beans have been affected by drought.
Photo: © Pablo Tosco/Oxfam Intermon

Figure 3. Indicators



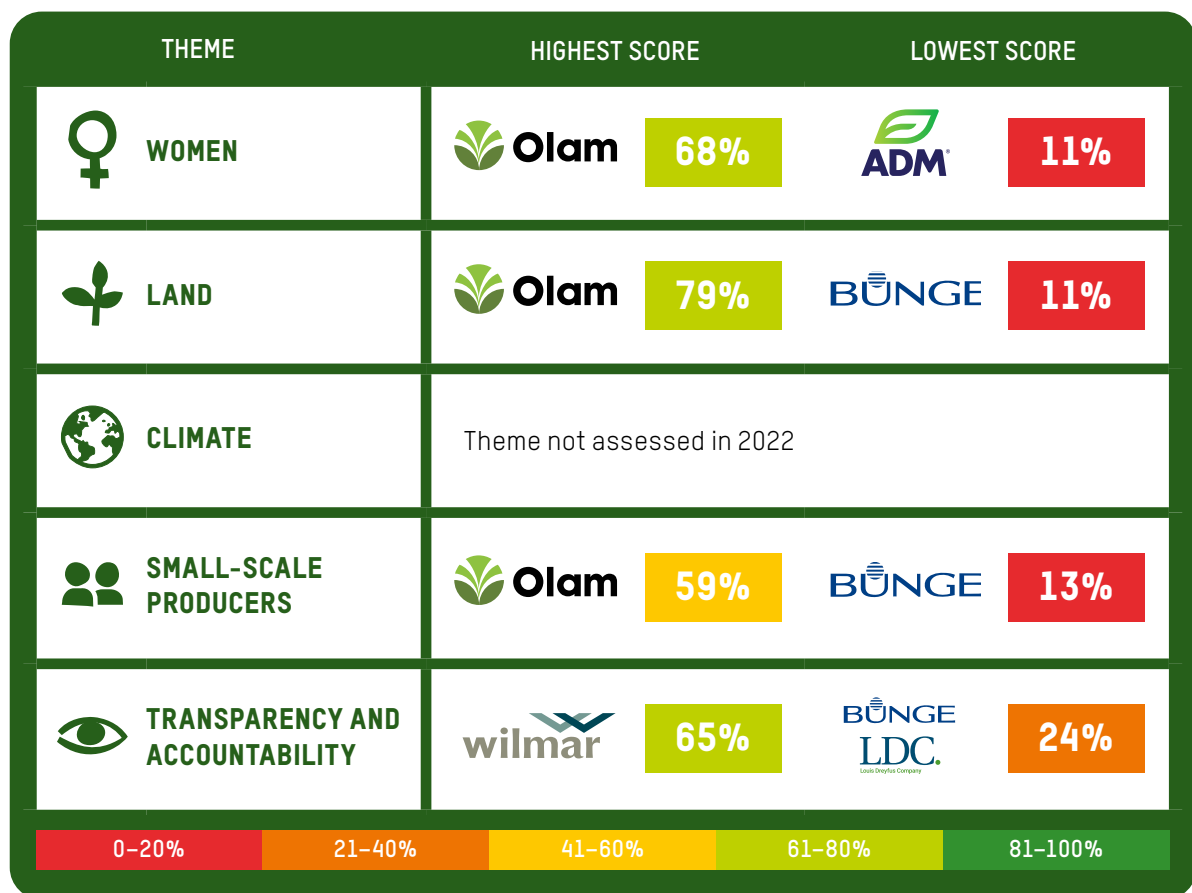
In total, the agribusiness scorecard contains over 80 indicators spread across five themes. Since the first edition of the scorecard in 2018, Oxfam has adjusted the methodology and indicators to incorporate new thinking and in response to company engagement. Six new indicators were added in 2020 to reflect new priorities related to current trends. Partial scoring was introduced in 2020 for several indicators to recognize efforts taking place within individual value chains. The sum of these changes maintained the integrity of the scorecard, while continuing to spur a race to the top.

Oxfam aims to make the scoring process transparent and accessible. All scores are based on information that can be found within the public domain. Each company receives their individual scores in advance of publication to ensure fair engagement. They are invited to provide feedback and submit additional documentation to support their scores up until a cutoff date. All companies provided feedback in this edition. While this report shows the total percentages for each issue area, Oxfam will share a more detailed file containing how companies scored on individual indicators on its [website](#).

ASSESSMENT RESULTS

This section discusses the results of the seven agribusinesses across the five thematic areas: women, land, climate, small-scale producers, and transparency and accountability. It presents some of the main challenges related to each theme and why addressing them is integral to the way global agribusinesses conduct their operations. Each theme includes a comparison of how scores have evolved from the first edition of the scorecard in 2018 to the third version conducted in 2022. The section also looks at trends within those scores and highlights performance on a selection of indicators. Finally, it showcases notable policy developments, as well as significant gaps that remain.

Figure 4. Overview scorecard

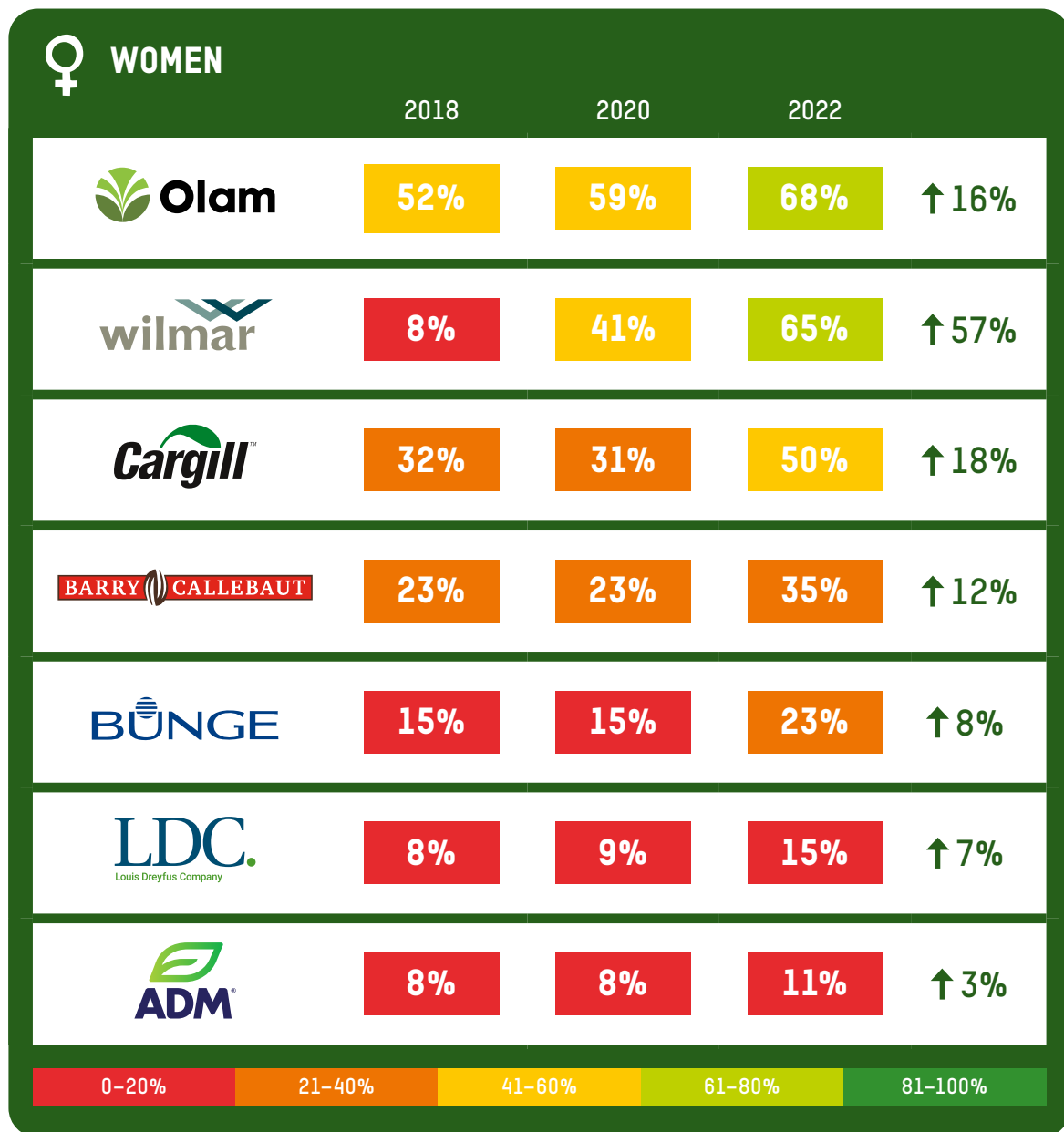


Companies showed mostly high scores on awareness and public advocacy. However, the move towards making concrete commitments remains uneven among the themes. Few companies have made detailed, time-bound implementation plans to back up their commitments. Some have policies and plans that cover just one commodity, rather than all the commodities they source, either directly or indirectly. This indicates that most agribusinesses are underperforming and have more work to do in terms of measuring and delivering impact.



THEME 1: WOMEN

Figure 5. Women scorecard



Women and agriculture

Women play an essential role in agricultural communities across the world. The sector remains one of the top sources of employment for most women in low- and middle-income countries.²⁶ Women comprise 43% of the agricultural labor source in low-income countries, with rates over 60% in South-East Asia and sub-Saharan Africa.²⁷ Their work is often concentrated in time and labor-intensive activities, which are poorly remunerated.²⁸

In addition to paid labor, women, on average, do three times as much unpaid care work as men globally.²⁹ Women in rural communities face more intensive unpaid care because they often lack time and labor-saving devices.³⁰ They also contribute unpaid labor by raising livestock

and growing crops for their family's consumption. All these activities contribute to women's time poverty, putting them on an unequal footing with men in terms of remuneration and economic agency.

Young women are 25% more likely than men to live in extreme poverty



Despite these important roles, women face structural barriers that limit their rights and dignity in communities tied to global agribusinesses. They bear the greatest burdens when it comes to poverty, hunger, disruptions tied to climate change, and other injustices, such as gender-based violence. Young women globally are 25% more likely than men to live in extreme poverty.³¹

Women working in agriculture experience unique impediments to exercising equal rights and opportunities compared with male farmers and workers. Fewer than 14% of agricultural holdings in low-income countries belong to women. Women face significantly less access to extension services and technical support such as training, funds, fertilizers, and other inputs. Estimates in Ghana showed that if women were given the same access to these vital inputs, the resulting increase in agricultural yields would be 20 to 30% greater, with the potential to reduce hunger by 17%.³²

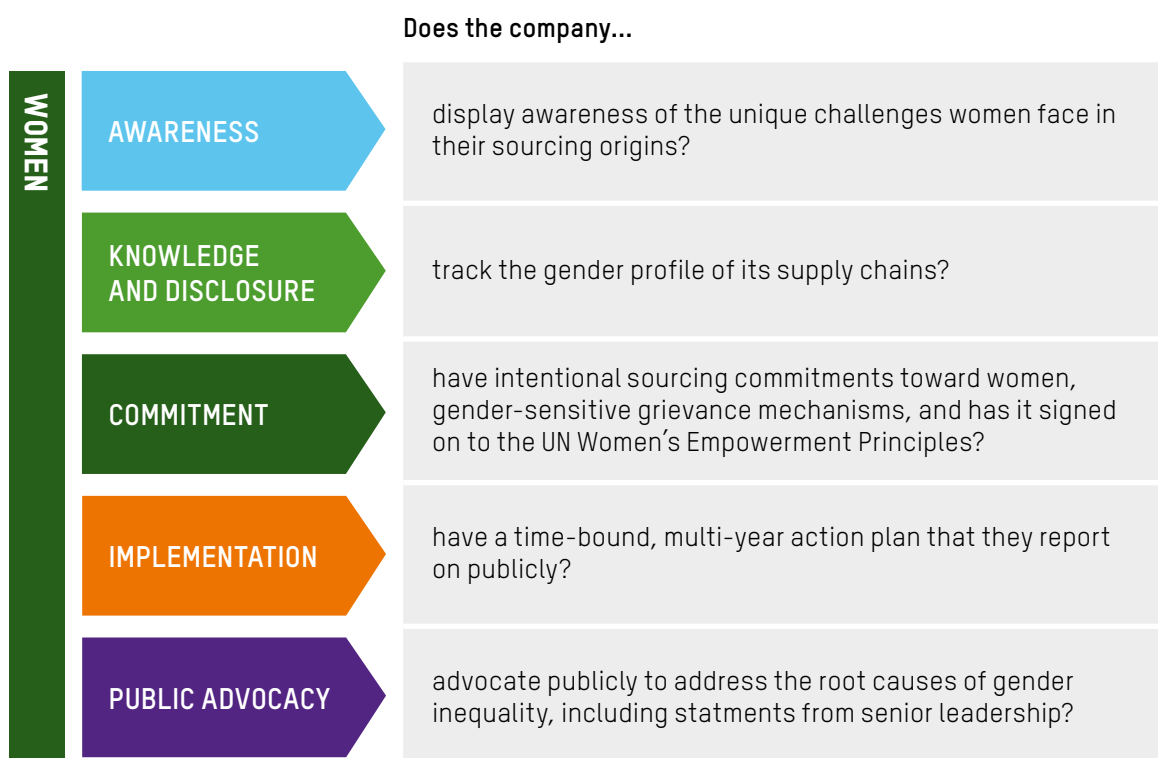
Above: Aguiratou Quedraogo is a farmer in Burkina Faso. She fetches water from a well to water her market gardening crops, with the help of a female farmer with whom she shares the agricultural plot. Thanks to a project implemented by Oxfam and an NGO partner, Aguiratou has been trained in new agricultural techniques to adapt to the effects of climate change. Photo: © Samuel Turpin/Oxfam

Global agribusinesses can and should invest in women by ensuring that their operations generate fair benefits and have a positive impact for women. Barriers to their ability to take on leadership roles, own their land, live safely in their communities, and have an equal, valued say in their family finances, all limit women’s agency and leave their communities worse off.

How Oxfam measured the agribusiness sector on its impact on women

The women theme measures companies on how they have integrated approaches to their business that ensure greater gender equality and women’s economic empowerment. It should be noted that Oxfam’s analysis through the scorecard did not measure whether a company’s approach included gender-diverse people, such as those who are non-binary.

Figure 6. Women indicators



Results

When Oxfam conducted the first agribusiness scorecard in 2018, few companies in the sector had robust commitments to address gender inequality in their supply chains in a holistic way. No major companies had agreed to time-bound action plans to tackle these inequalities and foster women’s economic empowerment. Only one company, Olam Group, had committed to tracking the gender profile of a high-risk supply chain (Box 3). The average scores across the women theme stood at just 21%.

Since then, scores have shown an overall low level of improvement. Two companies, ADM and Louis Dreyfus, did not score more than 15%. Such low scores indicate that neither company is sufficiently advancing gender equality and women’s economic empowerment in their operations and their supply chains. Only Olam Group and Wilmar managed to score more than 50% in the theme.

Despite low scores overall, there have been notable policy commitments that indicate that actors within the sector have increased interest in fostering greater equity between women and men. Wilmar showed the biggest leap, scoring just 8% in 2018, but 65% in 2022. They have a near perfect score in the awareness category, because they have been disclosing the gender profile of their plantation workers since 2019,³³ have a grievance mechanism that guarantees women equal access and have senior leadership who speak about the importance of addressing the root causes of gender inequality in supply chains.

Figure 7. Signatory of UN Women’s Empowerment Principles



Barry Callebaut, Cargill and Olam Group have also shown increased awareness and action on women’s economic empowerment and gender justice. As the three biggest cocoa processors globally, they have a principal role in delivering on gender commitments, a priority in Oxfam’s Behind the Brands campaign, made by Mars, Mondelez and Nestlé, some of their biggest customers. Since the initial scorecard, all three agribusinesses have now signed onto the UN Women’s Empowerment Principles.

Box 3. Taking action on gender equality

Olam Group sources from a large network of farmers and supports 826,000 farmers through its sustainability programs. Based on the company’s current estimates,³⁴ women farmers make up 15% of this network, or roughly 123,900 women.³⁵

Olam Group is an important company in the trade of small-scale producer crops, where women play an essential role. For example, Olam Group, the world’s second largest merchant of rice, a sector which currently involves nearly 1 billion producers. Roughly 80% of rice-producing farm laborers are women.³⁶ They are also especially vulnerable to the negative impacts of climate change, pandemic and diseases, health problems, and economic crises. Women farmers also suffer from worsening inequality and discrimination when they receive unfair shares of benefits and opportunities, lower wages, and their roles and contributions remain unrecognized at the household and community levels.³⁷ Women farmers make up roughly 25% of the rice farmers Olam Group source from, rice being the commodity with the highest participation of women farmers for Olam.

Continued overleaf

Olam Group works on women’s economic empowerment and issues around gender equity across its division. Table 1 summarizes the company’s efforts to train women and support their taking on leadership positions in farmers’ groups across commodities.

Table 1. Gender data in Olam Group’s supply chains

Total farmers	Women	Women leaders	Women farmers trained on good agricultural practices	Farmers trained on gender and women's rights
Cashew (Africa and Asia)				
44,295	9,710	62	4,424	1,984
Hazels (Turkey)				
4,501	433	10	433	3,187
Superfoods (quinoa, chia, kiwicha) – Peru				
2,106	426	5	426	0
Coffee (South America, Africa and Asia)				
61,600	9,966	84	5,516	18,703
Cocoa (South America, Africa and Asia)				
284,248	46,939	1,218	37,816	120,526
Rice (Africa and Asia)				
30,107	7,349	1,032	7,349	4,341

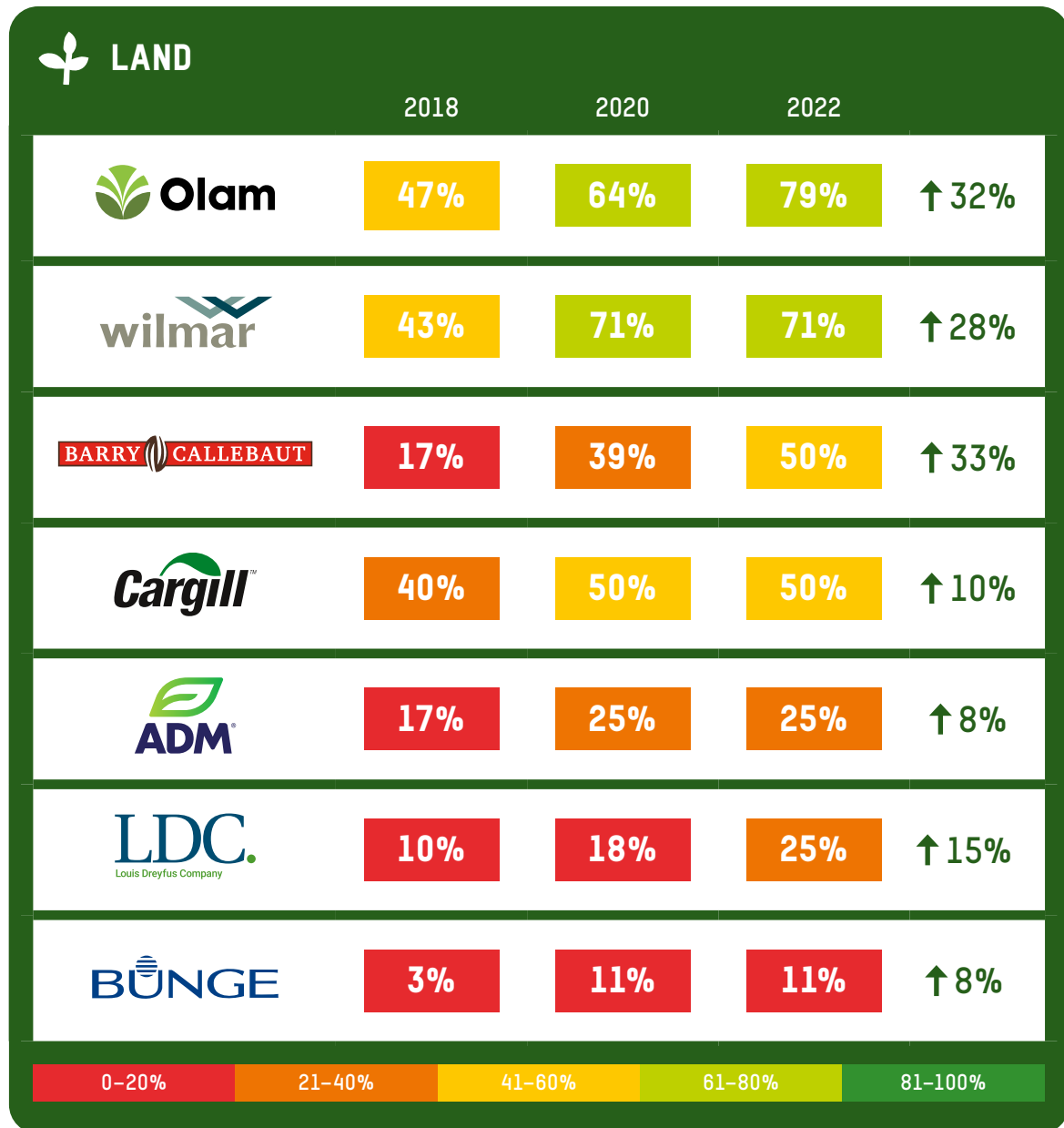
Source: Olam Group. (2020). *Improving Every Day for Rural Women*.³⁸

It is important to note that Oxfam believes that estimates of women in supply chains increase as a company continues to improve its methods of collecting gender-disaggregated data. Deepened engagement with rights holders can show companies how women’s roles in supply chains are often informal (e.g., playing a supporting role to the men in their households or on family farms), and not always visible in the supply chains they contribute to.



THEME 2: LAND

Figure 8. Land scorecard



Land is a foundational resource. Agriculture companies rely on land to grow or procure commodities and for land-based climate solutions. Land is at the core of a community’s ability to grow food, access water, and realize other related human rights. This is especially true for the nearly 2.5 billion small-scale food producers who depend on land for their livelihoods, food security, housing and the preservation of their cultures.³⁹ Given its foundational role, land is the bridge between companies’ climate and social sustainability agendas. Action on land, while also important in its own right, is essential for progress on issues including deforestation, human rights, women’s economic empowerment, and farmer livelihoods.

Companies should be focusing on land rights, land use, and how their operations and activities may exacerbate land inequality.

- Land rights: Small-scale farmers, Indigenous peoples and local communities (IPLCs) around the world have insecure rights to their land, leaving them vulnerable to displacement to make way for the production of agriculture commodities or for land-based climate solutions.⁴⁰ Stronger land rights and better enforcement and accountability for violations of those rights will result in less concentration of land within a small privileged population, reduced conflict over land, better environmental performance, and greater well-being of small-scale farmers and local communities.⁴¹
- Land use: Emissions from agriculture, forestry, and other land use (AFOLU), together with those from the fossil fuel industry, are driving the climate crisis. AFOLU contributes nearly one-quarter of global carbon emissions, much of it from land-use change, such as deforestation to produce agricultural commodities.⁴² In addition, monoculture agriculture brings the degradation of critical ecosystems, stress on water sources, and the use of agrochemicals, which can pollute soil and water.⁴³
- Land inequality refers to differences in the:
 - amount and value of land that people access or hold;
 - level of security of tenure that people have;
 - actual control that people have, including their decision-making power over land; and
 - control of benefits from land.⁴⁴

Various factors, including legacies of colonial systems and small-scale farmers' and IPLCs' insecure land tenure, have led to a system where 16% of the world's farms control 88% – the vast majority – of the agricultural land, while the largest 1% of farms operate over 70% of farmland.⁴⁵ In extreme cases such as in Colombia, 1% of landowners hold over 80% of the agricultural land, with the most extensive properties comprising over 50,000 hectares each.⁴⁶

Just 1% of
landowners...



operate over 70% of
the world's farmland



How agribusinesses relate to land issues varies. In some cases, they may own land directly through their processing and logistics facilities, as well as through farms and plantations. In other cases, they may use land indirectly through their suppliers. They may also be investing in land-based climate solutions, such as reforestation initiatives. No matter the relationship or level of understanding, all agribusinesses influence the way land is used globally and thus have a direct responsibility for ensuring respect for land rights and sustainable land use and reducing land inequality within their sourcing communities. How they address land issues, however, will depend on where they sit in each value chain.

How Oxfam measured the agribusiness sector on land

The land theme measures companies on how they have integrated approaches to their business that ensure greater respect for land rights and secure land tenure, and whether they are taking steps to address increasing land inequality. Indicators related to land use are found in the climate section of the scorecard.

Figure 9. Land indicators



Results

The first edition of the agribusiness scorecard did not include a single company scoring above 50% on the land theme, with an average score of just 25%. While many companies showed awareness of land issues, they lagged in their commitments and implementation. Not one company disclosed its landbanks, for example. Only Barry Callebaut, Cargill, Olam Group, and Wilmar had commitments around FPIC that applied to all their sourcing. Few companies had senior leadership speaking out on land issues.

Land scores showed the smallest increase since 2018 of all five themes, increasing by just 15 points on average. There was a widened gap between performers at the top and those at the bottom. ADM, Bunge and Louis Dreyfus did not score any points in the advocacy section, compared with Cargill, Barry Callebaut, Olam Group and Wilmar. Bunge, the lowest performer, scored just 11%, a full 68 points lower than Olam Group, the top performer. This gap is substantial given that both companies are heavily active in palm oil, a value chain that is particularly susceptible to land risks (Box 4).

Little has changed in terms of companies' willingness to disclose, in addition to implementation. No company systematically identified countries where land risks are particularly high. No company requests its suppliers to pursue alternative business models

that avoid the transfer of land rights. To date, no company has developed a credible action plan to mitigate land risks and confront the impacts on land rights, use and inequality across all its high-risk commodity sourcing.

Box 4. A tale of two traders

Olam Group and Bunge are both important processors and traders of key commodities, including palm oil. In addition to palm, Bunge trades a significant amount of soy and sugar that is processed into biofuel. They supply key downstream companies, including household names in the food and beverage sectors.

With high-risk commodity profiles, both companies need strong land policies and implementation. However, only Olam Group appears to be on the path to delivery, ranking at the top, while Bunge scores the lowest on the land theme.

Figure 10. Olam and Bunge shared customers



Note: While Olam is on the most current mill list for 2021 published by Kellogg, the company notes it is not a tier 1 supplier.

Oxfam found no publicly available documents that showed that Bunge displays an awareness of the importance of key issues, such as securing community access to land for cultural, spiritual and ceremonial purposes. Nor are the company's commitments up to par, with major gaps such as ensuring FPIC across all its high-risk commodity sourcing.

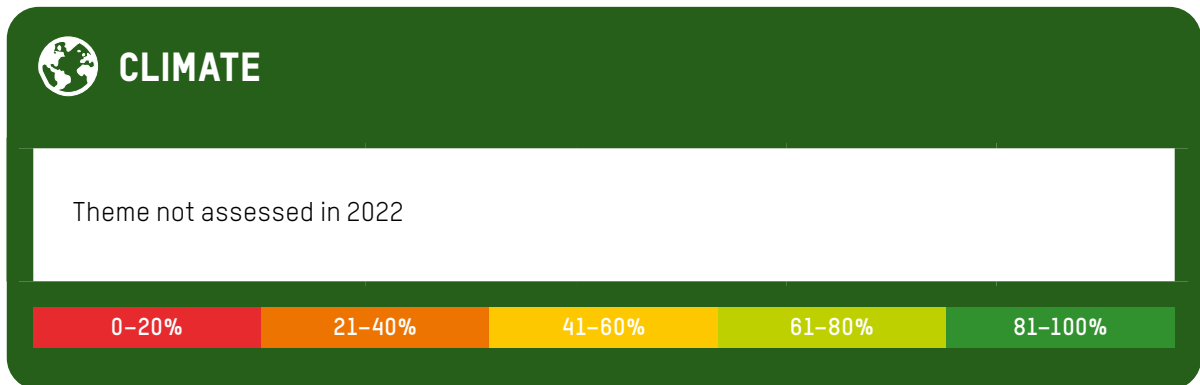
As a large actor in palm oil, soy and bioethanol, Bunge has an important role to play in ensuring respect for land rights and addressing its role in increasing land inequality. It also has a responsibility based on the UN Guiding Principles on Business and Human Rights.

Given these stark differences in performance, Oxfam urges Bunge to deepen its land policies and implementation.



THEME 3: CLIMATE

Figure 11. Climate scorecard



Climate change and agriculture

People in the sourcing countries where global agribusinesses operate are on the frontlines of the global climate crisis. Erratic weather patterns, more frequent and severe natural disasters, biodiversity and habitat loss, deforestation, and rising sea levels encompass the compounded disruptions felt deeply in countries dependent on agricultural exports. Extractive models of production deplete resources and continue to tax communities of their ability to cope with the challenges of a changing planet, while also acting as significant sources of emissions.

With the world’s food system accounting for about one-third of GHG emissions, the agribusiness sector contributes significantly to the drivers of climate change.⁴⁷ Roughly two-thirds of food system emissions come from agriculture, land use, and changes in land use.⁴⁸ Deforestation stemming from agricultural expansion represents one of the greatest climate threats in a generation, accounting for a significant share of global emissions. In Peru alone, deforestation for oil palm has caused a net loss of nearly 3m metric tons of carbon (or 10.5m metric tons of CO₂ equivalent) over the last 20 years.⁴⁹

The global food system accounts for 33% of GHG emissions worldwide



Climate change clearly intersects with inequality within the agricultural sector in significant ways. Oxfam and the Stockholm Environment Institute found that the richest 10% of the world’s population were responsible for 52% of climate emissions between 1990 and 2015, while the poorest 10% of the population were responsible for only 7%.⁵⁰

Similar results can be seen for large, multinational companies whose value chains emit far greater total emissions than small-scale farmers who are often located in low-income countries that are least responsible for the causes of climate change.⁵¹ Those most responsible for climate change have more financial resources to adapt and create resiliency, while those experiencing poverty must shoulder the fallout with what little they may have.



Interconnected issues resulting from climate change disproportionately affect women and girls, a trend that will grow as the climate crisis deepens. Evidence shows that they face increased threats to their rights, safety and ability to live with dignity in times of crisis. As competition increases over scarcer resources, women will bear the brunt of needing to walk further to collect water, receiving less food during droughts and performing most household tasks in the wake of extreme weather events.⁵²

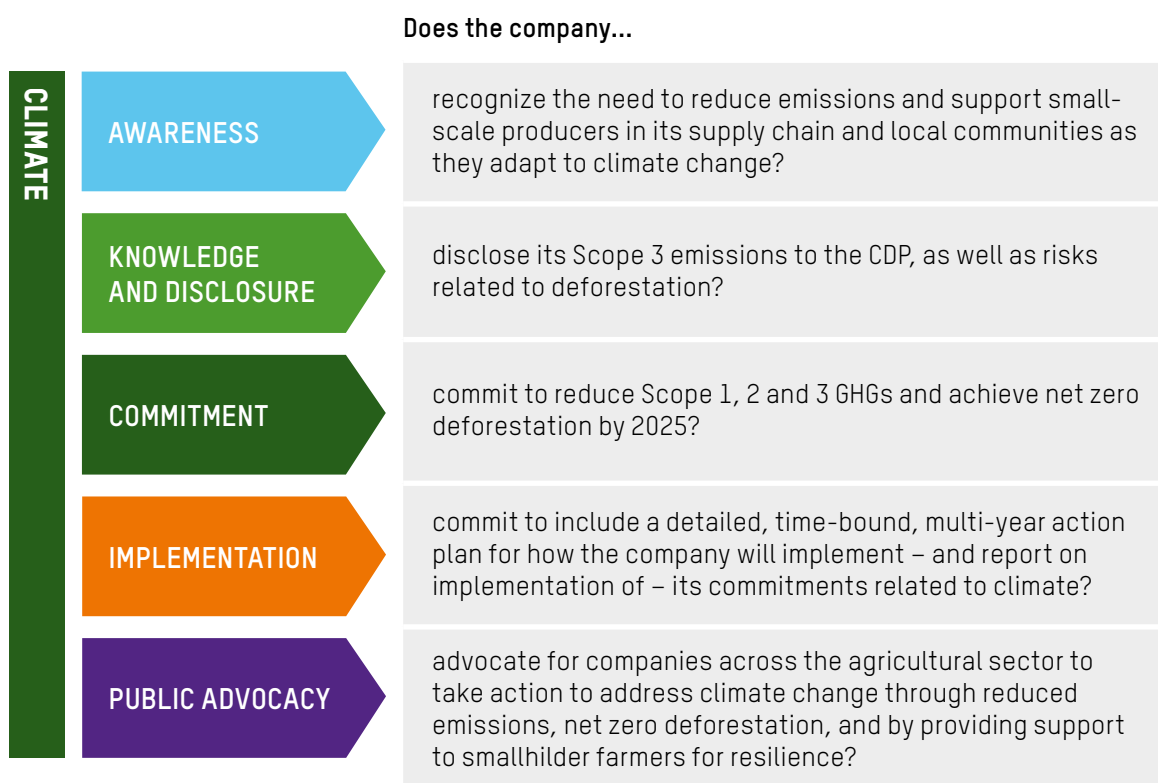
Given the totality of its reach, the climate crisis will continue to drastically change the way people live. A truly sustainable food sector offers a path to a healthier planet that can sustain life for generations. The world needs responsible business actors, including the agribusiness sector, to change their practices to avoid the worst effects of climate change.

How Oxfam measured the agribusiness sector on climate

In past scorecards, the climate theme has measured companies on how they have integrated approaches to their business that reduce GHG emissions, achieve net zero deforestation and help support small-scale producers and farmers as they cope with climate change.

Above: Kawsar Omer Abdi, from Dilhayste in Ethiopia, said: 'We've been badly affected for the last few years of continuous drought. There has been a total failure of all crops for the last four years. Photo: © Pablo Tosco/Oxfam Intermón

Figure 12. Past criteria for climate



Results

The climate theme showed the highest averages overall when Oxfam published the first agribusiness scorecard in 2018, with an average of 40% across the seven agribusinesses. While this rate was low, it did seem to reflect a growing awareness of climate change issues. In 2018, four out of seven agribusinesses recognized the need to reduce Scope 3 agricultural emissions, with three reporting those emissions to CDP (formerly Carbon Disclosure Project), a leading repository for environmental reporting and risk management. However, few companies had credible, time-bound plans to achieve zero net deforestation across all high-risk commodities.

In our 2022 scorecard assessment, we realized that our climate indicators fell short of capturing the urgency of the climate crisis. Oxfam made the decision not to include climate scores in this report based on a number of factors, including new guidance from the SBTi and the UN, which was released after the cutoff date for our assessment.

Oxfam developed the climate indicators in 2018 and updated them in 2020 in line with stricter criteria needed to meet the growing urgency of the climate crisis. While average scores increased across the years, it is important to note that climate targets and their implementation must keep up with the rapidly changing science to avert the worst effects of climate change.

As most of the seven agribusinesses report their GHG emissions targets through SBTi, Oxfam recognizes that the recently released SBTi FLAG guidance should play a role in developing updated targets which would not be assessed in this scorecard due to our publication timeline. We also expect that companies will take into consideration guidance from the HLEG that were released at COP27.

In terms of their current commitments on GHG and deforestation disclosures, some of the global agribusinesses in this report to both CDP and SBTi. Just one company, Louis Dreyfus Corporation, however, does not report to either.

Louis Dreyfus Corporation is the only company in Oxfam's assessment that does not report to the CDP



Box 5. Meeting the moment on climate change

At the UN COP27 in 2022, a group of global agribusinesses, including ADM, Bunge, Cargill, Louis Dreyfus Company, Olam Group and Wilmar, released the Agriculture Sector Roadmap to 1.5°C, which outlines how they plan to reduce emissions while achieving deforestation-free agricultural production.⁵³ The roadmap commits the companies to implement science-based targets through time-bound action plans that will be reported annually. Specific targets will be set for sectors that contribute highly to deforestation, including soy, palm oil and cattle.

Oxfam commends the sector for using its voice to draw attention to the real threat of climate change and deforestation. While this is an important shift for the sector, it falls short of the transformational change needed and does not reflect what science is showing as necessary. Expressing the intent to set a target is not the same as setting a target, making it public, and taking action to meet it. As many of the agribusinesses in this assessment have yet to publicly set their targets in line with their announcement, it is difficult to assess where the sector stands overall in implementing this commitment.

Current and future climate action from companies must continue to reflect the most up-to-date information. In that vein, Oxfam advocates that companies step up their climate action by incorporating the following elements into their approaches:

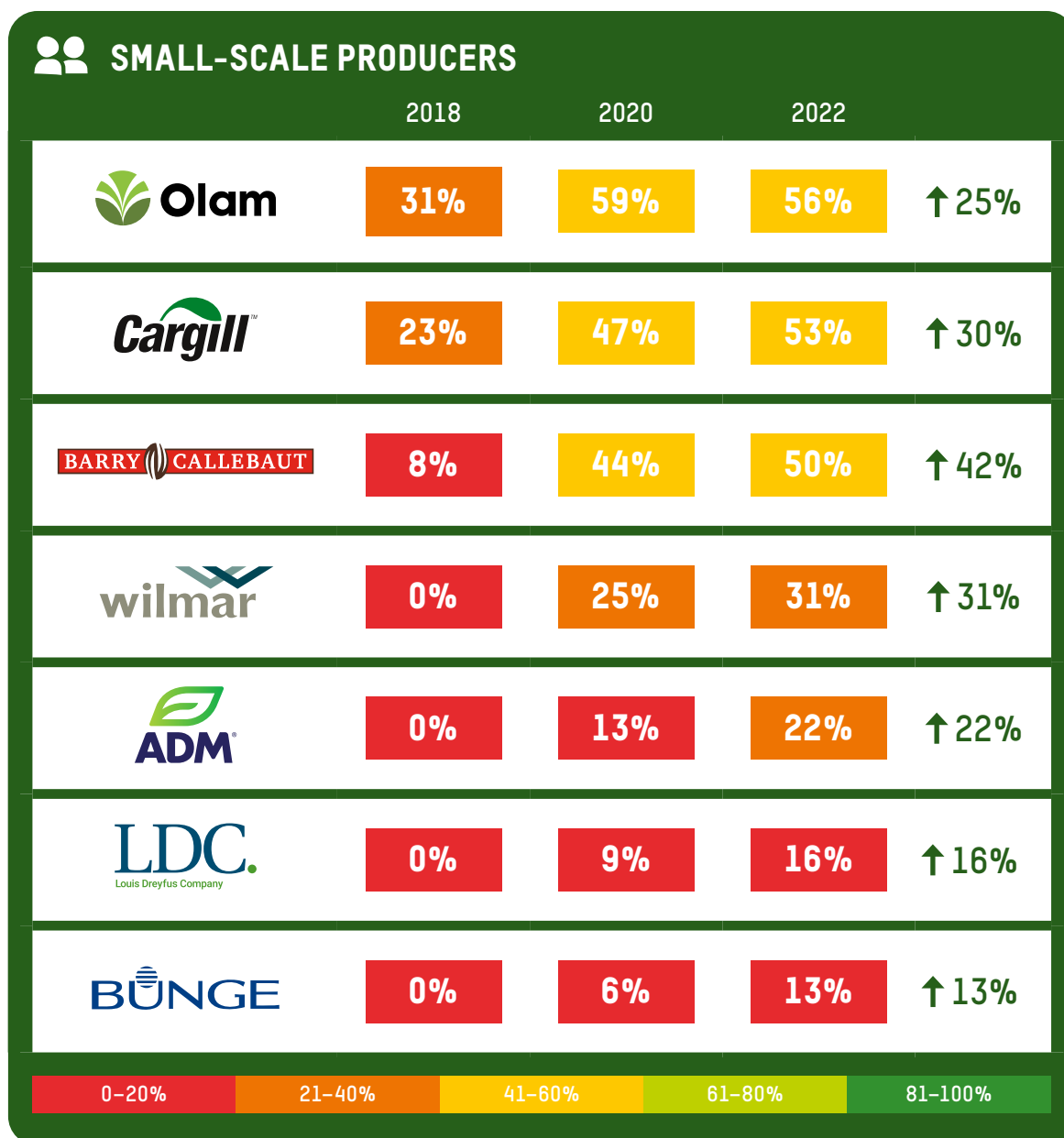
- End 'greenwashing' of company commitments and set measurable, transparent targets approved by the SBTi
- Follow SBTi's FLAG guidance when setting targets.⁵⁴
- Put fairer, gender-just food systems at the heart of climate response, to help small-scale food producers recover, rebuild and respond to climate crises.
- Anchor emissions reductions in food first and rights-based approaches that help to achieve zero hunger and zero emissions without pushing people, including small-scale producers, off their land.⁵⁵
- Ensure public relations, lobbying activities, and trade group membership align with stated climate and sustainability goals.

As scientific evidence continues to evolve, Oxfam expects companies to adjust their commitments and actions accordingly. Oxfam welcomed the recommendations from the HLEG launched in 2022 and will align future guidance and key performance indicators to track company progress with these recommendations.⁵⁶



THEME 4: SMALL-SCALE PRODUCERS

Figure 13. Small-scale producers scorecard



Small-scale producers and agriculture

Small-scale producers form the backbone of agricultural communities, particularly in lower-income countries. More than 3.4 billion people live in rural communities; most are engaged in small-scale farming to feed their families and communities.⁵⁷ In sub-Saharan Africa and parts of Asia, small farms account for up to 80% of production.⁵⁸ Women make up a significant proportion of these farmers globally, in many cases accounting for more on-farm work than men. For instance, rice provides food security, jobs and income for roughly 1 billion small-scale producers, of whom women account for 80%.⁵⁹



While much of their production and consumption takes place locally, small-scale producers also play a significant role in supplying global value chains with commodities. They grow most of the world's cocoa, producing 3.47m metric tons in West Africa alone (an estimated 74% of global production).⁶⁰ An estimated 25 million small-scale producers produce 70 to 80% of the world's coffee.⁶¹ Small-scale producers can also be found in cotton, sugar and palm oil value chains, among others.

Multinational agribusinesses have a crucial linking role with small-scale producers in their value chains. They act as buyers of various crops that they then process into added-value food goods and ingredients. Many have invested in various sustainability efforts to address small-scale producer challenges to ensure they meet their own business needs through future supplies. Olam Group, for example, provides sustainability support to nearly 1 million small-scale producers globally.⁶²

Cocoa farmers receive less than 8% of a chocolate bar's total value



Above: Marifa is a farmer who plants corn, rice, coffee, candlenut and more. She has been able to increase her product price point with support from Oxfam local partner LP2DER. Oxfam acknowledges the support of the Australian Government through the Australian NGO Cooperation Program (ANCP). Photo: © Kyo Umareta/Oxfam

Even with these efforts, small-scale producers too often do not receive a fair share. Estimates show coffee farmers earn as little as 0.4% of the total cost of a cappuccino. Similarly, those farming cocoa receive as little as 8% of the total value of a chocolate bar.⁶³ This is despite their links to multibillion dollar industries that provide high profits to shareholders who may sit thousands of kilometres away in wealthy countries. The chocolate industry alone was estimated to be worth over \$171bn in 2022.⁶⁴

Global agribusinesses have a clear responsibility in reducing inequality by ensuring farmers can prosper. For any commitment to have credibility, they must commit to tracking and disclosing the total number of small-scale producers in their supply chains. Similarly, companies need to boost their business model by sharing more value, structuring contracts transparently and investing in their sourcing relationships on a long-term basis. Without these, the sector is putting the very future of sustainable farming at risk.

How Oxfam measured the agribusiness sector on small-scale producers

The small-scale producers theme measures the extent to which companies act to include farmers as full partners in their business through greater supply chain traceability, fair commercial trading terms and explicit efforts to ensure they achieve a living income.

Figure 14. Small-scale producers indicators



Results

The small-scale producer theme ranked the lowest in the 2018 agribusiness scorecard, with an average of just 9% across the seven companies. Only Olam Group and Cargill scored over 20%, while four agribusinesses – ADM, Bunge, Louis Dreyfus, and Wilmar – scored 0%. Just one company, Olam Group, disclosed the number of small-scale producers in its supply chain. Not a single company had a commitment to improve the ability of small-scale producers across all of its agricultural commodity supply chains to earn a living income.

Overall, scores have improved since 2018, but remain very low. The average across all companies, 34%, shows improvement. Olam Group remains the top-ranked company, while Barry Callebaut increased its average from 8% in 2018 to 50% in 2022, the biggest increase in absolute terms. Many of these changes in scores took place when Oxfam adopted partial scoring for action taking place in one or two commodities, rather than the original requirement of at least three commodities. Five of the agribusinesses show examples of sourcing practices that go beyond regular sourcing relationships in transferring value to small-scale producers. Four out of seven support farmers' rights to organize collectively.

More work needs to happen around transparency and value share. No company recognizes the importance of contract transparency (clear, accessible terms to all parties), despite how critical this is to farmers. None measure and disclose the share of value going to small-scale producers and none have an explicit commitment to ensuring fair, transparent, stable and long-term sourcing relationships. Only one company, Olam Group, has a time-bound action plan to increase farmers' abilities to earn a living income in line with the Living Income Community of Practice's definition, an updated requirement for the 2022 assessment. (Box 6).

Box 6. The journey towards a living income

Compounding challenges and crises – climate change, land insecurity and price volatility – make farming a difficult way to earn a living, especially in lower-income countries. Small-scale producers who may grow crops connected to highly profitable food companies cannot afford basic necessities for themselves and their families.⁶⁵ Farmer poverty remains widespread in the global food system.⁶⁶ The need for farmers to receive a living income has never been more urgent.

The Living Income Community of Practice defines living income as the 'net annual income required for a household in a particular place to afford a decent standard of living for all members of that household.'⁶⁷ Living income goes beyond basic subsistence by emphasizing the need to live decently on a household income that provides for shelter, nutritious food, healthcare, education, transportation and other essentials. It is more than just a descriptor; it is a human right.⁶⁸

The push for a living income has been particularly strong in sectors that rely on small-scale producers. Civil society groups have long cast a spotlight on the struggles of farmers who grow cocoa, coffee, cotton and other crops in export value chains. Some certification programs, like Fairtrade, have also worked towards boosting farmer incomes through better trading practices and premium payments.

Continued overleaf

Companies in the agribusiness sector have mixed results regarding their own commitments on living income. Just one, Olam Group, has made a commitment to increase farmers' abilities to earn a living income in line with this definition. All the other agribusinesses benchmarked by Oxfam also have significant small-scale producers within some of their key value chains. Louis Dreyfus, one of the biggest coffee traders in the world, lacks any commitment to helping coffee farmers earn a living income. ADM, Bunge and Wilmar all lack living income commitments that cover palm oil, which is in part supplied through small-scale farming.

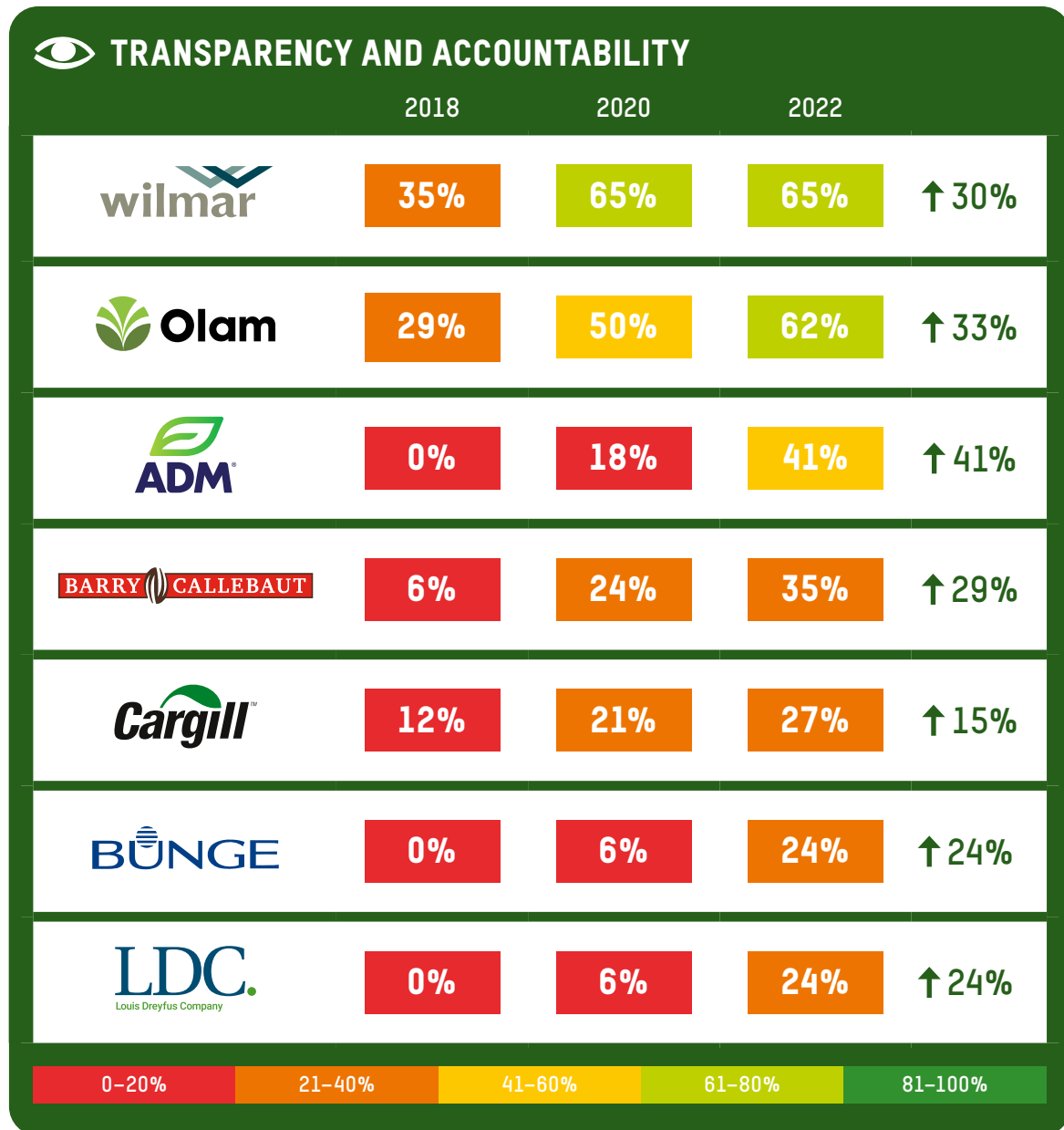
It should be noted, however, that Barry Callebaut and Cargill have set targets, but that they are not yet in line with the Living Income Community of Practice's definition. While both companies refer to living income in their targets, they use the World Bank's definition of poverty as their benchmark, which is a lower income threshold.⁶⁹ Oxfam acknowledges that while these goals have the potential to contribute to a farmer's ability to earn a living income, they would not meet the higher bar set by the Living Income Community of Practice and therefore should be refined in the near future.

As pressures on farmers continue to grow, companies must ensure that they adopt and implement effective and inclusive living income strategies. These strategies should follow a due diligence approach, address a company's procurement practices, include strategies targeted at the most vulnerable farmers, be gender inclusive and be transparent in reporting on progress and targets.⁷⁰



THEME 5: TRANSPARENCY AND ACCOUNTABILITY

Figure 15. Transparency and accountability scorecard



Transparency and accountability in agriculture

As a sector that spans nearly all corners of the planet, food and agricultural production has an impact on millions of workers, farmers and communities in ways that can restrict their human rights and dignity. This is especially true in contexts where governance structures may be weak or overly influenced by business interests. The ability to advocate against these abuses and hold actors accountable is diminishing in countries that are hostile to civil society. The growing number of crises – the global pandemic, natural disasters exacerbated by climate change, rising inflation and inequality – all bring greater risks of human rights abuses taking place.

Growing concerns around these issues are coming from all sides. Consumers have grown more concerned about where their food comes from and the conditions of the people who produced it. In one study, nearly 86% of people surveyed globally said that 'ingredient transparency is extremely important or very important.'⁷¹

86% of people surveyed globally said that ingredient transparency is 'extremely important or very important'



They are joined by investors who provide capital to global agribusinesses and increasingly set a higher bar for their investments out of concern that human rights abuses have an impact on a company's bottom line. International non-government organizations likewise have continued to ramp up their oversight as local organizations face both political and physical threats to their existence (Box 7).

While these issues may seem remote from the C-suite, companies in the agribusiness sector have a responsibility to uphold the human rights of all stakeholders who may be adversely impacted by their activities. They meet those responsibilities through their overall human rights due diligence, defined by the UNGPs as 'a way for enterprises to proactively manage potential and actual adverse human rights impacts with which they are involved.'⁷²



Above: Djelika is a farmer in Bana, Mali. Before the beginning of the Regreening Africa project with Sahel Eco, World Agroforestry Centre, World Vision and Oxfam, the land she worked was completely bare. Photo: © Diafara Traoré/Oxfam

How Oxfam measured the agribusiness sector on transparency and accountability

The transparency and accountability theme measures companies on how they govern human rights monitoring, reporting and remediation.

Figure 16. Transparency and accountability indicators



Results

The transparency and accountability theme showed very low results in the first edition of the scorecard, with an average of just 12% in 2018. This was the second-lowest average after the small-scale producer theme. Three companies, ADM, Bunge and Louis Dreyfus, scored zero points, while just two, Olam Group and Wilmar, scored above 20%. Of the two, only Olam Group has an explicit policy to uphold the UNGPs.

In the most recent edition, scores have improved substantially for some agribusinesses, while remaining relatively low for others. Wilmar has maintained the highest score in the theme, followed by Olam Group. Bunge and Louis Dreyfus remained at the bottom, scoring just 24%. Overall, ADM showed the biggest increase in absolute terms, increasing its score from 0% to 41%.

Scores showed improvements in terms of both policy and implementation. Supply chain traceability appears to be on the increase. While no company scored on the 2018 indicators associated with supply chain disclosure; all companies now disclose supplier-level information for one or more commodities. At the time of the assessment, all companies except Cargill disclosed which governance structure (e.g., Board sub-committee) has responsibility for the oversight of human rights and discloses its reports and statements. Cargill published an updated a Human Rights Policy that outlines their governance structure, though the publication date in January 2023 means it could not be included for this

assessment as it came after Oxfam's deadline to submit new documentation.⁷³ All companies except Bunge now recognize the limitations of social audits in their agricultural commodity supply chains and have made a commitment to move beyond a reliance on social audits.

More progress needs to be made on human rights disclosures and recognition of human rights norms. Just one company, Barry Callebaut, identifies and discloses salient human rights risks across its supply chains over time, including by demonstrating it engages with key stakeholders. Just three companies have a grievance mechanism covering at least one high-risk commodity that incorporates key tenants of the UNGPs. No company provided evidence that it gives preference to suppliers whose business forms give greater power to workers, small-scale producers and local communities.

Transparency and accountability remain crucial in the food and agricultural sectors. It is imperative that global agribusinesses continue to deepen their human rights due diligence approach and strengthen existing policies and commitments.

Box 7. The importance of human rights defenders

Human rights defenders (HRDs) are people who, individually or with others, act to promote or protect human rights in a peaceful manner.⁷⁴ They advocate for the application and adherence to human rights norms and laws at the local, regional and international levels. These rights include civil and political rights as well as economic, social and cultural rights. HRDs include all those working to defend their land rights, protect the environment and ensure respect for indigenous and community rights.

HRDs represent a vital line of defense when government and other actors fail to address human rights issues. They play a critical role in the prevention and remediation of abuses that drive injustice and inequality. In many locations, they face considerable threats to their lives and general well-being.

Why should agribusinesses respect and protect their role?

Threats against HRDs are on the rise. According to Global Witness, over 1,700 land and environmental defenders lost their lives between 2012 and 2021.⁷⁵ They estimate that 59% of HRDs killed in 2021 were protecting land, Indigenous peoples', and environmental rights. Many were killed while defending against business-related abuses, particularly deforestation.

Violence against HRDs takes place in some of the most important sourcing countries with global agribusinesses' supply chains. Global Witness found that in 2020, three-quarters of recorded attacks in Brazil and Peru occurred in the Amazon region. Other studies have recognized that environmental HRDs face elevated rates of threats compared with other categories of defenders.⁷⁶ With large footprints in high-risk commodities like soy and palm oil, companies must adopt policies and practices that support the rights of HRDs.

How do their policies and practices support HRDs?

The global agribusiness sector must urgently address issues related to HRDs. Just three companies – ADM, Olam Group and Wilmar – have explicit policies that require them and their suppliers to ensure zero tolerance for threats, intimidation and/or attacks against HRDs. Weak performance overall on grievance mechanisms, a key instrument for HRDs, also reflects a deficient approach to these vital voices.

RECOMMENDATIONS AND CONCLUSIONS

This section outlines Oxfam's recommendations for the agribusiness sector, their downstream customers, and actors in the financial sector who invest in them.



Recommendations for global agribusinesses

The global agribusiness sector has a direct role in creating and sustaining a more just food system. Oxfam's recommendations for companies within the sector are below, while the annex outlines individualized company scorecards and recommendations.

Ensure that women have more power within food and agriculture

- Sign on to the UN Women's Empowerment Principles.
- Commit to tracking and disclosing the gender profile of farmers and workers in your supply chains.
- Ensure grievance mechanisms provide equal access and representation to women.
- Adopt multi-year, time-bound commitments that contribute positively to women's economic empowerment in your supply chains.
- Participate in collective advocacy to address the root causes of gender inequality.

Respect land rights and address increasing land inequality

- Demonstrate full awareness of the importance of communities' right to land for cultural, spiritual and ceremonial purposes, and identify where land-related risks to people and the environment are high and require company action.
- Recognize the extent of the company's land footprint,⁷⁷ taking steps such as disclosing the total area of land in your landbanks and requesting the same of suppliers.
- Ensure company land commitments are up to par, such as committing to respecting communities' FPIC decisions when buying, leasing, or developing on land across all high-risk commodity supply chains and for land-based climate initiatives.
- Prioritize business and sourcing models that strengthen the land rights of small-scale producers.
- Engage others, including governments, women's rights organizations and civil society organizations to understand and identify solutions to addressing land tenure risks and impacts and increasing land inequality.

Address the climate crisis and its impacts

- Adopt comprehensive zero net deforestation policies, with a 2025 deadline, that incorporate the UNGPs.
- Recognize the need to support small-scale producers to build resiliency and create a measurable, time-bound commitment to do so.
- Set clear GHG reduction targets in line with a 1.5°C pathway that include Scope 1, 2 and 3 emissions, approved by SBTi and incorporating SBTi FLAG guidance, reporting regularly on progress.
- Support low carbon and regenerative agriculture approaches, including agroecology and agroforestry, that put small-scale producers first.⁷⁸
- Ensure public relations, lobbying activities, and trade group membership align with stated climate and sustainability goals.

Value the role of small-scale producers through fair trading practices

- Disclose the total number of small-scale producers within your value chains, disaggregated by gender and country of origin, starting with those that are most high-risk.
- Create fair and transparent contracting terms regarding quality requirements, quantity, terms of pricing, and dispute resolution mechanisms.
- Make an explicit commitment to ensuring fair, transparent, stable and long-term sourcing from small-scale food producers.
- Support the rights of farmers and farm workers to organize collectively.
- Commit to a multi-year, time-bound action plan to improve the ability of farmers to earn a living income, as defined by the Living Income Community of Practice.

Demonstrate ‘knowing and showing’ through more disclosure and accountability

- Publish traceability information for commodities with high levels of human rights risks.
- Thoroughly embed the UNGPs within your business, regularly reporting on their implementation, including lessons learned.
- Adopt a thorough policy that protects HRDs by demonstrating zero tolerance for threats and intimidation.
- Clearly identify who has responsibility within the company to ensure human rights are respected and disclose outputs from relevant governing bodies (Boards, committees, etc.) who cover human rights issues.
- Publish a comprehensive human rights impact assessment which assesses the impact of agricultural supply chain activities on small-scale food producers, including assessing gender and climate risks.



Recommendations for downstream companies

- Call on agribusiness suppliers to strengthen their approaches to women's economic empowerment, land rights and land inequality, climate change, fair trading practices and human rights due diligence.
- Partner with companies across the food and agriculture sector to foster pre-competitive collaboration that has a positive impact on farmers, workers and their communities.
- Make benchmarking your policies with those of your suppliers an integral part of your approach to sourcing.
- Create clear incentives for business units to source from agribusinesses with strong approaches to ESG issues.
- Disclose the names of all Tier 1 suppliers for all commodities you source; work with and through global agribusinesses to disclose sources to the farm and plantation levels.
- Work with and through global agribusinesses to drive change at the farm and plantation levels.
- Ensure that trading practices with global agribusinesses are fair and do not incentivize a 'race to the bottom' through unrealistic sourcing terms.



Recommendations for investors

- Ensure that companies in your investment portfolio are providing ESG disclosures in line with the guidance of International Sustainability Standards Board⁷⁹.
- Encourage agribusiness companies to publish traceability information for high-risk commodities.
- Ensure that companies disclose strong public commitments to human rights (including gender equity) across agribusiness companies in your investment portfolios.
- Ensure human rights (including gender equity) and environmental sustainability are respected and prioritized by companies in your investment portfolio by promoting adherence to the UNGPs.
- Encourage agribusiness companies to identify and assess human rights and environmental risks and impacts, especially in high-risk commodities and sourcing regions, and actively engage these companies on risk management and impact.
- Signal the importance of commitment to gender equity and human rights across all companies in your investment portfolios.
- Ensure that companies have processes to prevent, mitigate, and remediate adverse human rights impacts because of agribusiness operations.
- Ensure that salient and material issues laid out in Oxfam's agribusiness scorecard receive greater board-level and senior management oversight.

CONCLUSIONS AND NEXT STEPS



This analysis of three editions of the agribusiness scorecard over the course of five years shows signs of progress mixed with stalled action. Within certain themes, individual companies made new commitments that have the potential to change from business as usual towards a model that incorporates more responsible practices. While some have chosen to act, others still have substantial room for improvement. All still have significant work to do.

It is code red for humanity, and the next decade will be decisive. There is a clear need for a roadmap and transformational commitments to tackle inequality, human rights and climate justice in the food sector. This is particularly true around sourcing agricultural raw materials from smallholder and women farmers, whose voices should be amplified in and help shape such roadmaps. The story of food does not need to be one of suffering. Global agribusinesses have a choice in either contributing to this narrative or changing it for the better. Given the urgency of the climate crisis and other intersecting challenges, the global agribusiness sector must act now to avoid further exploitation and destruction.

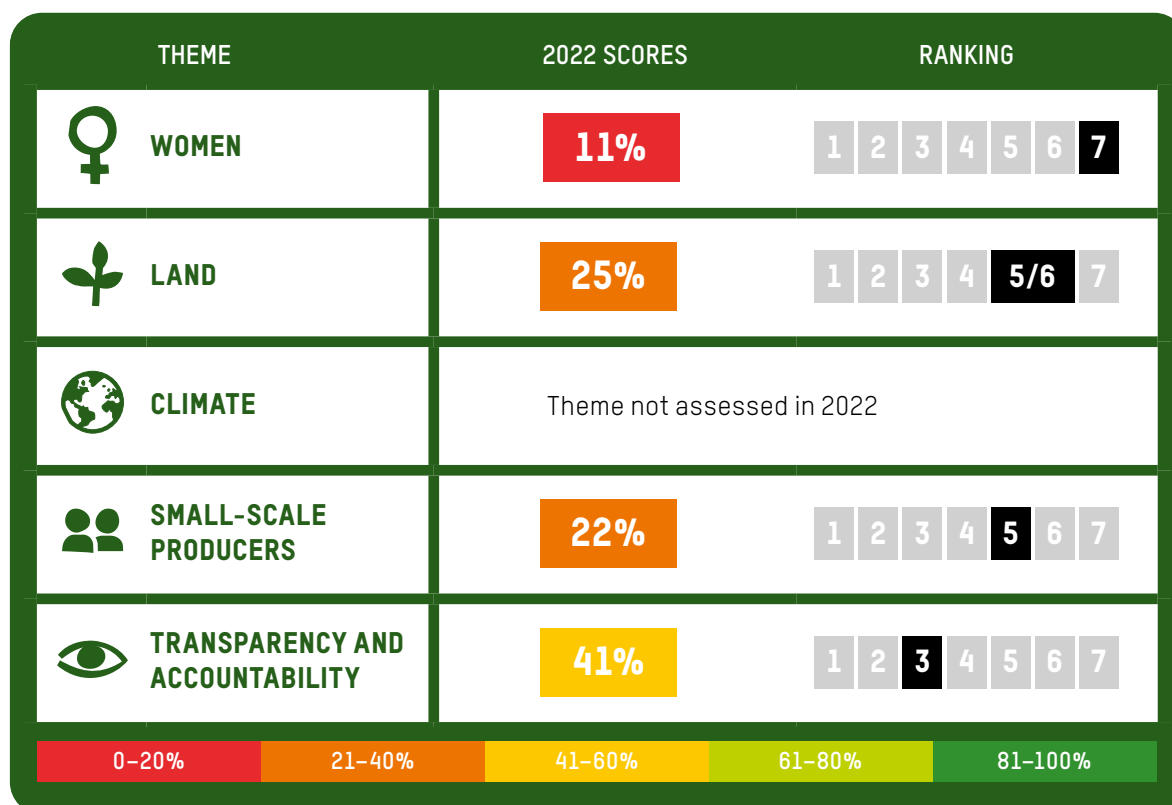
The story of food does not need to be one of suffering.

Above: In Kpatua, Ghana, Cecilia is queen mother of Kpatua and a farmer. She farms millet, maize, rice, and soya beans during the rainy season and farms vegetables with other women in Kpatua during the dry season using a solar-powered water pump. Photo: © Nana Kofi Acquah/Oxfam

ANNEX



Figure 17. Oxfam agribusiness 2022 scorecard: ADM



Selected recommendations

Women

- Demonstrate greater awareness of the unique issues that women face in agriculture.
- Sign on to the UN Women’s Empowerment Principles and require your suppliers to do the same.
- Publish a human rights impact assessment focused on women in your value chains.

Land

- Disclose ADM’s landbanks and request that your suppliers do the same.
- Engage with civil society organizations focused on land in your origin countries.
- Pursue business models that strengthen the land rights of small-scale food producers.

Climate

- Set science-based targets using SBTi FLAG guidance and validated by SBTi with a clearly defined pathway to reduce greenhouse gas (GHG) emissions in line with limiting global warming to 1.5°C and report on progress yearly.
- Report on emissions related to food waste and food loss.
- Support suppliers on mitigating the impact of GHG and implementing sustainable land use practices.

Small-scale producers

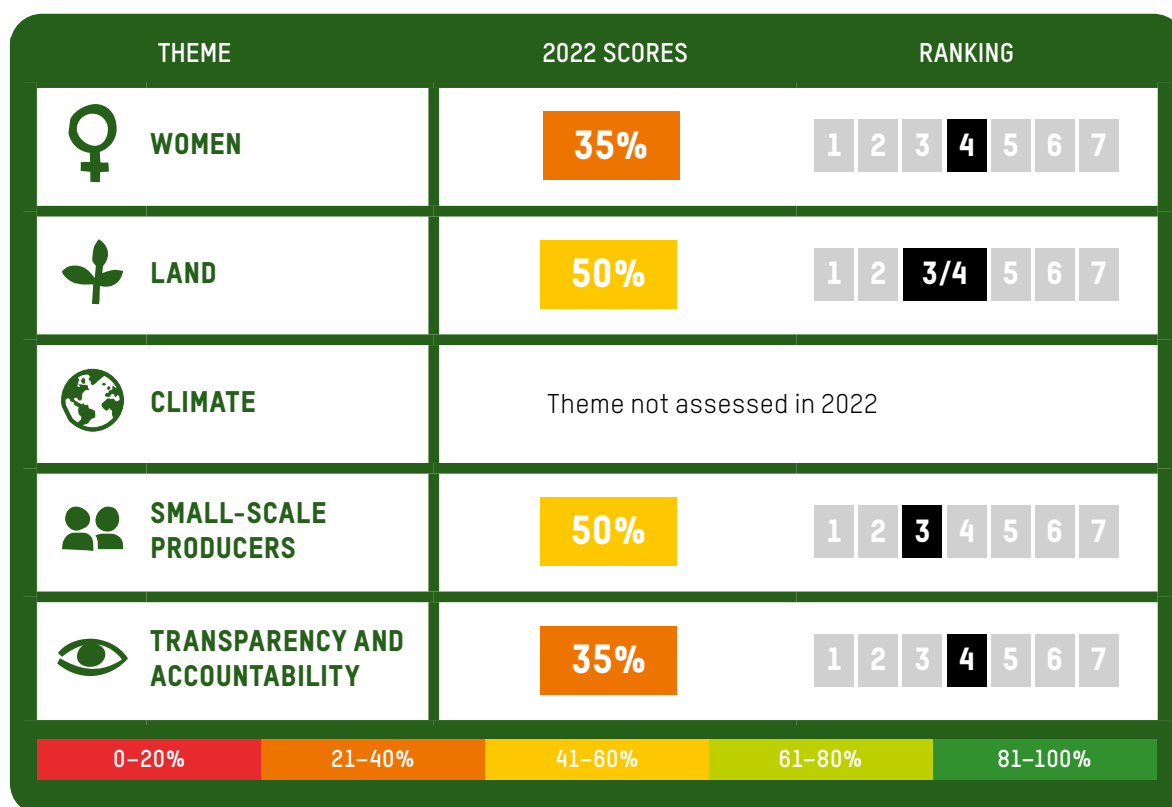
- Disclose the number of small-scale producers in your value chains.
- Make an explicit commitment to ensuring fair, transparent, stable and long-term sourcing.
- Commit to a time-bound plan to improve the ability of farmers to earn a living income.

Transparency and accountability

- Identify and disclose salient human rights risks across supply chains, reporting regularly.
- Strengthen grievance mechanisms in line with the UNGPs.
- Publish a human rights impact assessment for at least three commodities.



Figure 18. Oxfam agribusiness 2022 scorecard: Barry Callebaut



Selected recommendations

Women

- Recognize the importance of women's civil society organizations and find ways to work with them in your origin countries.
- Commit to publishing the gender profile of your major supply chains, including gender-disaggregated data.
- Publish a human rights impact assessment focused on women in your value chains.

Land

- Request that your suppliers, especially high-risk suppliers, disclose their landbanks.
- Pursue business models that strengthen the land rights of small-scale food producers.

Climate

- Establish a multi-year, time-bound strategy across your supply chain to invest in the climate change resilience of small-scale farmers.
- Establish explicit targets to reduce methane (if not already done).
- Review and revalidate the company's science-based targets and action plan using SBTi FLAG guidance, with a clearly defined pathway to reduce GHG emissions in line with limiting global warming to 1.5°C and report on progress yearly.

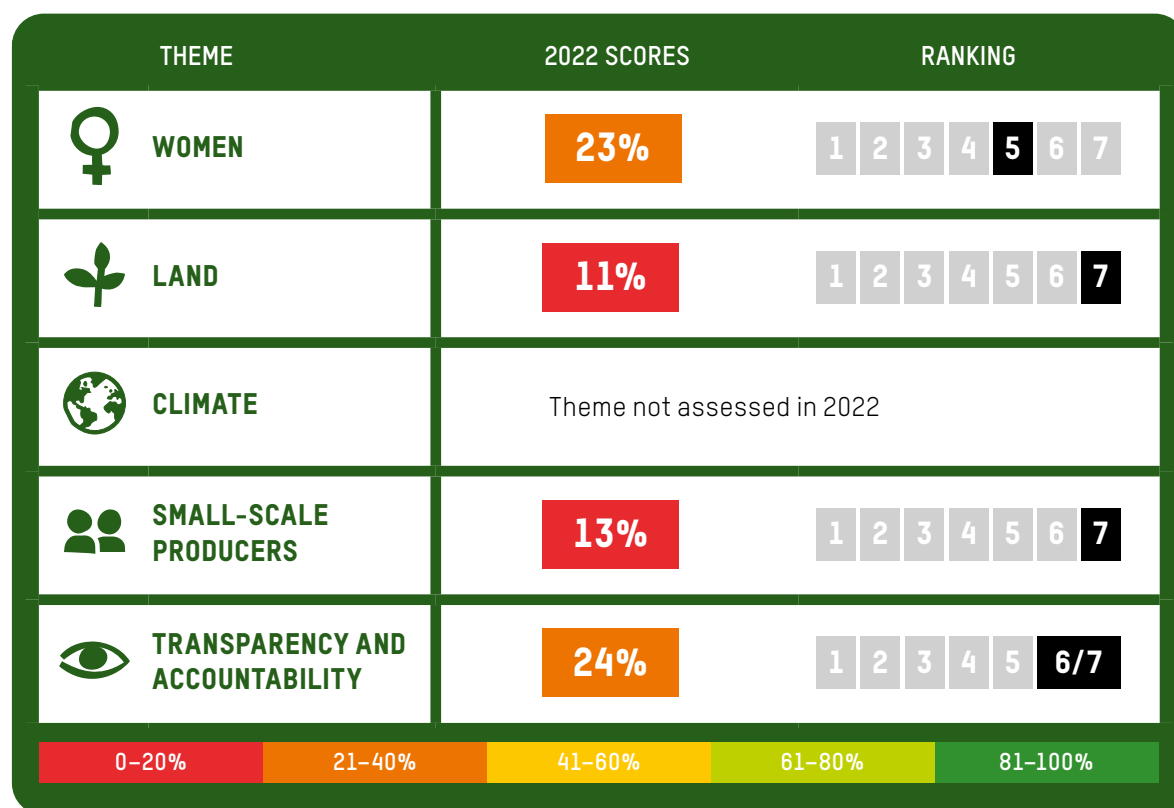
Small-scale producers

- Disclose the number of small-scale producers in your value chains.
- Make an explicit commitment to ensuring fair, transparent, stable and long-term sourcing.
- Ensure that you are on track to improve the ability of farmers to earn a living income.

Transparency and accountability

- Make an explicit commitment to the UNGPs.
- Establish a grievance mechanism in line with the UNGPs that is available to all stakeholders.
- Publish a human rights impact assessment for at least three high-risk commodities, and an action plan to address its findings.

Figure 19. Oxfam agribusiness 2022 scorecard: Bunge



Selected recommendations

Women

- Demonstrate greater awareness of the unique issues that women face in agriculture.
- Sign on to the UN Women’s Empowerment Principles and require your suppliers to do the same.
- Publish a human rights impact assessment focused on women in your value chains.

Land

- Adopt a comprehensive FPIC policy that applies across all your supply chains.
- Disclose Bunge’s landbanks and request that your suppliers do the same.
- Engage with civil society organizations focused on land in your origin countries.
- Pursue business models that strengthen the land rights of small-scale food producers.

Climate

- Set science-based targets and action plan, using SBTi FLAG guidance, and validated by SBTi with a clearly defined pathway to reduce GHG emissions in line with limiting global warming to 1.5°C and report on progress yearly.

- Support suppliers on mitigating the impact of GHG and implementing sustainable land use practices.
- Adopt a policy and action plan to assist farmers in building resiliency.

Small-scale producers

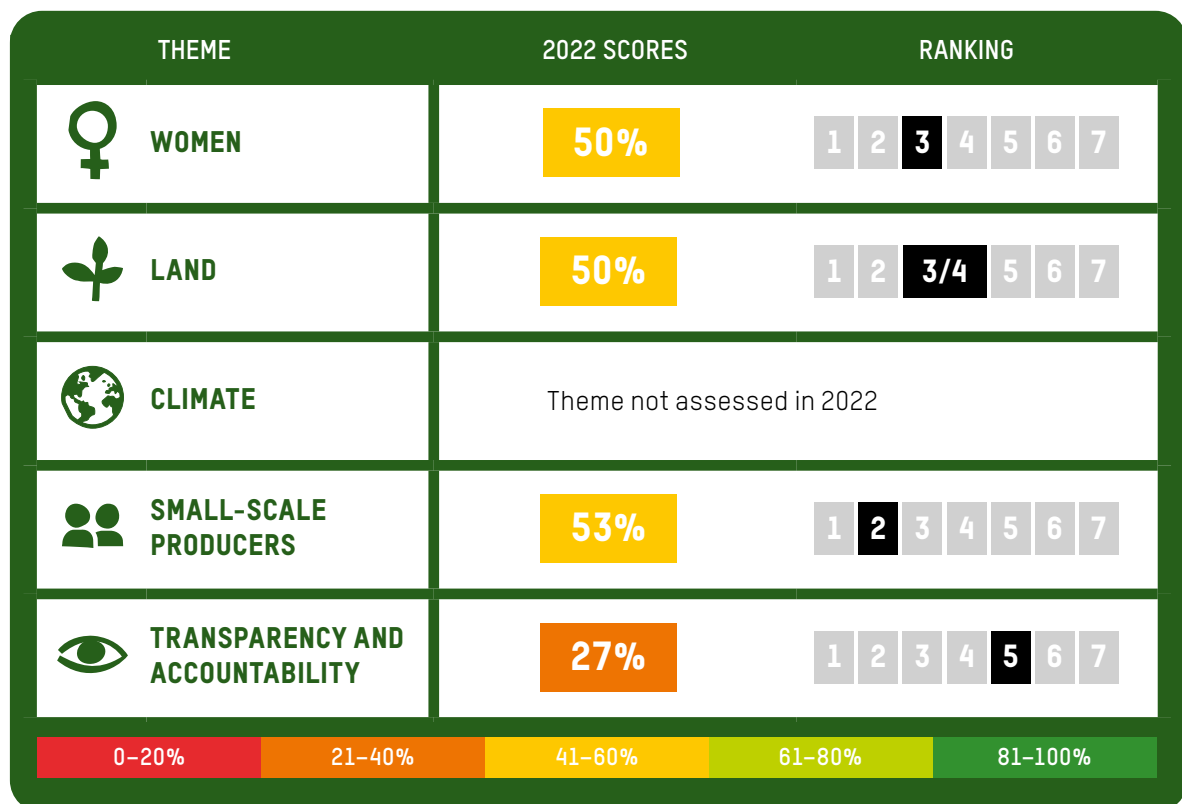
- Disclose the number of small-scale producers in your value chains.
- Make an explicit commitment to ensuring fair, transparent, stable and long-term sourcing.
- Commit to a time-bound plan to improve the ability of farmers to earn a living income.

Transparency and accountability

- Identify and disclose salient human rights risks across supply chains, reporting regularly.
- Strengthen grievance mechanisms in line with the UNGPs.
- Publish a human rights impact assessment for at least three commodities.



Figure 20. Oxfam agribusiness 2022 scorecard: Cargill



Selected recommendations

Women

- Adopt a time-bound action plan to increase women's economic empowerment and resiliency.
- Recognize the importance of women's civil society organizations and find ways to work with them in your origin countries.
- Publish a human rights impact assessment focused on women in your value chains.

Land

- Disclose Cargill's landbanks and request that your suppliers do the same.
- Engage with civil society organizations focused on land in your origin countries.
- Pursue business models that strengthen the land rights of small-scale food producers.

Climate

- Adopt a comprehensive zero net deforestation plan with a 2025 target.
- Adopt a policy and action plan to assist all farmers in building resiliency.
- Review and revalidate the company's science-based targets and action plan, using SBTi FLAG guidance, with a clearly defined pathway to reduce GHG emissions in line with limiting global warming to 1.5°C and report on progress yearly

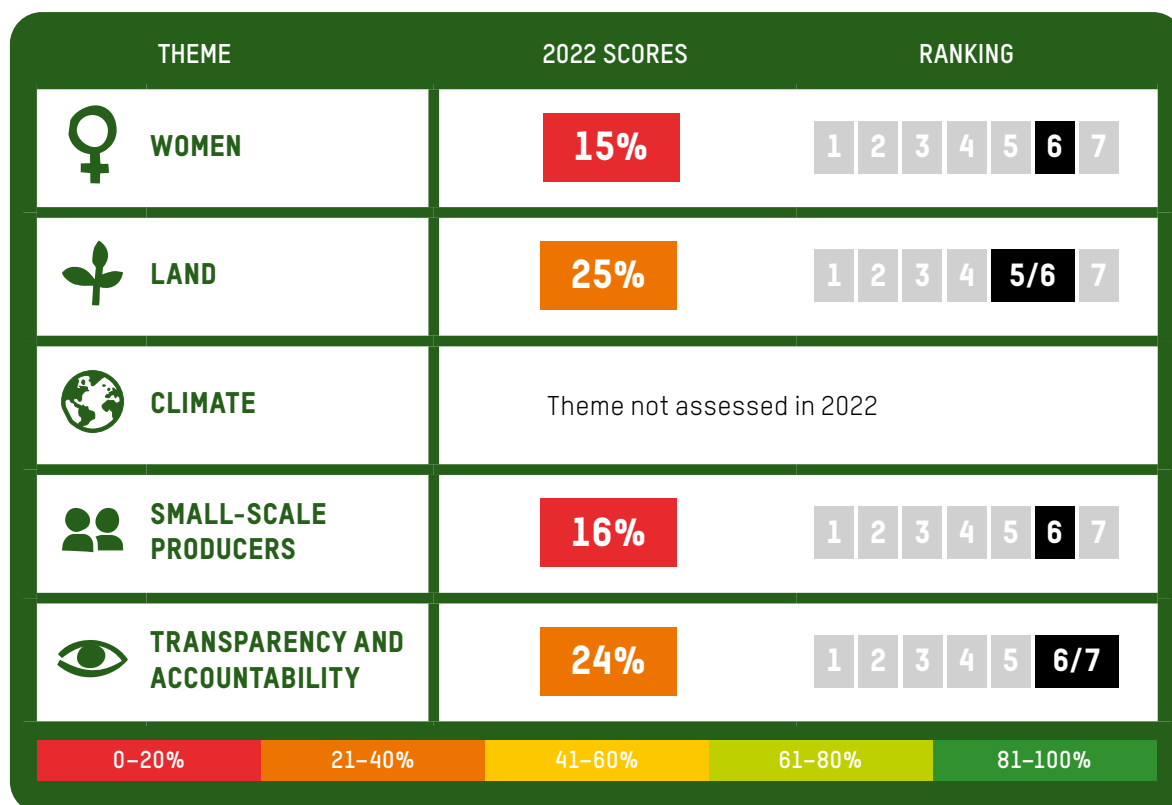
Small-scale producers

- Disclose the number of small-scale producers in all of Cargill's high-risk value chains.
- Make an explicit commitment to ensuring fair, transparent, stable and long-term sourcing.
- Commit to a time-bound plan to improve the ability of farmers to earn a living income.

Transparency and accountability

- Identify and disclose salient human rights risks across supply chains, reporting regularly.
- Strengthen grievance mechanisms in line with the UNGPs.
- Publish a human rights impact assessment for at least three commodities.

Figure 21. Oxfam agribusiness 2022 scorecard: Louis Dreyfus Company



Selected recommendations

Women

- Sign on to the UN Women’s Empowerment Principles and require your suppliers to do the same.
- Adopt a time-bound action plan to increase women’s economic empowerment and resiliency.
- Publish a human rights impact assessment focused on women in your value chains.

Land

- Disclose Louis Dreyfus Company’s landbanks and request that your suppliers do the same.
- Adopt a comprehensive FPIC policy that applies across all your supply chains.
- Engage with civil society organizations focused on land in your origin countries.
- Pursue business models that strengthen the land rights of small-scale food producers.

Climate

- Adopt a comprehensive zero net deforestation plan with a 2025 target.
- Set a science-based targets and action plan, using SBTi FLAG guidance, and validated by SBTi with a clearly defined pathway to reduce greenhouse gas (GHG) emissions in line with limiting global warming to 1.5°C and report on progress yearly.
- Support suppliers on mitigating the impact of GHG and implementing sustainable land use practices.
- Adopt a policy and action plan to assist farmers in building resiliency.

Small-scale producers

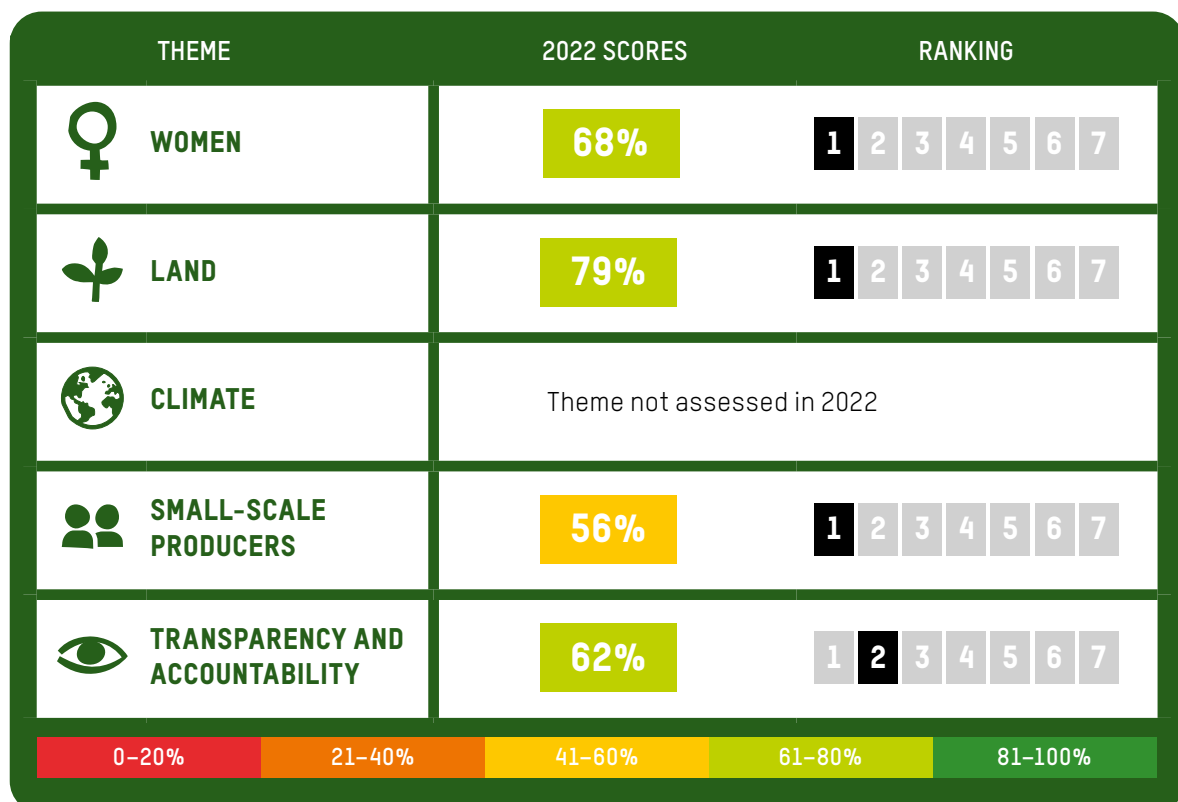
- Disclose the number of small-scale producers in your value chains.
- Make an explicit commitment to ensuring fair, transparent, stable and long-term sourcing.
- Commit to a time-bound plan to improve the ability of farmers to earn a living income.

Transparency and accountability

- Identify and disclose salient human rights risks across supply chains, reporting regularly.
- Strengthen grievance mechanisms in line with the UNGPs.
- Publish a human rights impact assessment for at least three commodities.



Figure 22. Oxfam agribusiness 2022 scorecard: Olam



Selected recommendations

Women

- Commit to implementing supply-chain-wide initiatives (beyond projects limited in scale and scope) that provide specific support to women farmers facing external shocks (e.g., extreme weather events, reduced water availability, soil degradation and food price volatility) for at least three high-risk commodities.
- Publish a human rights impact assessment focused on women in your value chains.

Land

- Commit to publicly disclosing contracts for concession agreements – prior to the transfer of land rights or finalization of leasehold arrangements – when buying, leasing, holding or developing new land.
- Engage with civil society organizations focused on land in all origin countries.
- Pursue business models that strengthen the land rights of small-scale food producers.

Climate

- Adopt a comprehensive zero net deforestation plan with a 2025 target.
- Review and revalidate the company's science-based targets and action plan, using SBTi FLAG guidance, with a clearly defined pathway to reduce GHG emissions in line with limiting global warming to 1.5°C and report on progress yearly
- Adopt a policy and action plan to assist farmers in building resiliency to climate change.

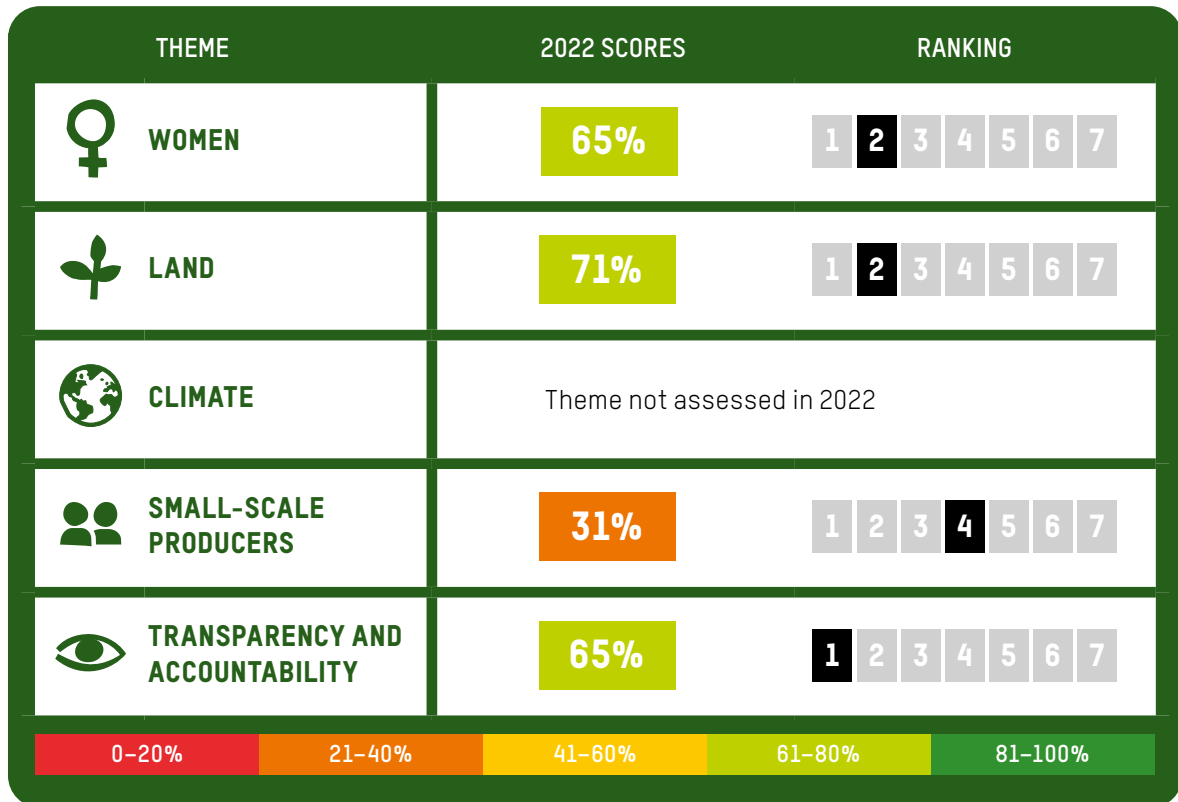
Small-scale producers

- Measure and disclose the share of value going to small-scale producers in your sourcing of three high-risk agricultural commodity supply chains.
- Make an explicit commitment to ensuring fair, transparent, stable and long-term sourcing.
- Commit to a time-bound plan to improve the ability of farmers to earn a living income in all relevant supply chains.

Transparency and accountability

- Identify and disclose salient human rights risks across all supply chains, reporting regularly.
- Strengthen grievance mechanisms in line with the UNGPs.
- Publish a human rights impact assessment for at least three commodities.

Figure 23. Oxfam agribusiness 2022 scorecard: Wilmar



Selected recommendations

Women

- Sign on to the UN Women’s Empowerment Principles and require your suppliers to do the same.
- Publish a human rights impact assessment focused on women in your value chains.

Land

- Commit to publicly disclosing contracts for concession agreements – prior to the transfer of land rights or finalization of leasehold arrangements – when buying, leasing, holding or developing new land.
- Engage with civil society organizations focused on land in all origin countries.
- Pursue business models that strengthen the land rights of small-scale food producers.

Climate

- Adopt regular reporting on your 2025 deforestation commitment.

- As announced by the company in 2022, set science-based targets and action plan, using SBTi FLAG guidance, and validated by SBTi with a clearly defined pathway to reduce GHG emissions in line with limiting global warming to 1.5°C and report on progress yearly.
- Adopt a policy and action plan to assist farmers in building resiliency to climate change.

Small-scale producers

- Measure and disclose the share of value going to small-scale producers in its sourcing of all high-risk agricultural commodity supply chains.
- Make an explicit commitment to ensuring fair, transparent, stable and long-term sourcing.
- Commit to a time-bound plan to improve the ability of farmers to earn a living income in all relevant supply chains.

Transparency and accountability

- Identify and disclose salient human rights risks across all supply chains, reporting regularly. Publish a human rights impact assessment for all relevant high-risk origins.

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