Food Industries for People and Planet: Toward a New Research Agenda

Summary Report of the Roundtable and Research Day
June 25-26, 2018

IFPRI, Washington D.C.
4 July, 2018
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* This report was prepared by Rob Vos and Sara Gustafson, with important contributions from Tess Lallemant, Flor Paz, and Siddhartha Baral.
On June 25-26, 2018, over 50 participants representing public and private sector institutions, international organizations, and academia gathered at the International Food Policy Research Institute (IFPRI) headquarters in Washington, D.C. to discuss the priorities and strategic vision for a new research program on Food Industries for People and Planet (FIPP). The discussions resulted in a clearer vision for the direction of the program, as well as the identification of several important areas of focus moving forward.

This note briefly summarizes the key elements of the discussions and conclusions from both the Roundtable event, held on June 25, 2018, and the Research Day, held on June 26, 2018. The Annexes include the agendas (Annex 1) and participants for both events (Annex 2), as well as a description of the Research Consortium that participants agreed to set up as a key outcome of the Roundtable (Annex 3).

### Key Messages

- **Rapid changes are taking place in distribution systems, food processing, and food services (the midstream of the global food system).** These changes impact farm systems, agricultural input markets, and environmental and nutritional outcomes. Yet far too little research has looked at the ramifications of these changes. The FIPP program is well suited to fill this void.

- **Expanding and modernizing food sectors, especially at the midstream stages, bring enormous opportunities for new job creation, diversification of diets, and increased food safety.** They also bring daunting challenges in the form of unhealthy diets and increased environmental pressures as food value chains lengthen. The FIPP program should focus on providing evidence and analysis to enable policymakers and market actors to address the challenges and seize the opportunities.

- **To do so, a broad, multi-stakeholder research consortium is needed.** This consortium must be inclusive with representation from developed and developing countries, men and women, public and private sector stakeholders, formal and informal sectors, actors along all stages of the food system from production to sale, and researchers from multiple disciplines.

- **Rather than attempt to address every factor within the complex arena of food systems,** the program must clearly prioritize select areas of research and focus on providing strong evidence within those areas to inform and drive policy.
Summary of key findings of Roundtable and Research Day

Three main takeaways

First, participants recognized the importance and relevance of FIPP’s research focus on the midstream of the food system, as stated in the background note for the Roundtable. The rapid changes taking place in distribution systems, food processing, and food services are exerting increasing influence on farm systems and agricultural input markets, at one end, and on nutritional outcomes, at the other. Yet far too little research is taking place to understand the ramifications of these changes. At the Roundtable, stakeholders agreed the FIPP program would be well suited to fill this void.

Second, it was recognized that expanding and modernizing food sectors, especially at the midstream stages, bring enormous opportunities for new job creation, diversification of diets and food safety, but also bring daunting challenges, inter alia, by catering for unhealthy diet and adding to environmental pressures as food value chains lengthen. The FIPP program should provide evidence and analysis to enable policymakers and market actors to address the challenges and seize the opportunities.

Third, it was broadly agreed that it would be meaningful to form a broad, multi-stakeholder research consortium (FIPP-MSC) to better equip all stakeholders to thrive in this rapidly changing environment. As follow up on this, IFPRI would request that participants confirm the interest of the institutions they represent in forming part of the FIPP-MSC.

Vision for the FIPP program

The need for a broad program examining the midstream of the food system, its modernization and industrialization, and its impacts on diets and nutritional outcomes, economic growth, jobs, and planetary health was broadly felt. Yet several calls were made for sharper focus and a clearer vision statement.

Suggestions were made for a less academic and more policy-oriented mission statement for the FIPP program. While not discussed at length, one suggested way of putting this could be:

- **The world needs healthier and more sustainable food systems.** Currently, malnutrition and dietary risks rank as the top two health risks associated with the global burden of disease; in addition, food systems at large are responsible for one-third of all global greenhouse gas emissions. Modern food industries and distribution systems are believed to increasingly induce these problems, as they encourage over-consumption of sugar, fat, and salt and drive increased energy and resource use associated with dietary change and food processing, transport, and packaging. However, these problems can be overcome and managed with intelligent regulation and through the encouragement of best practices that induce healthier diets and resource efficiency along food supply chains.

- **The world needs jobs, and food systems can help deliver these.** The ILO estimates that 600 million decent jobs will be needed for new labor market entrants by 2030, with an additional 780 million jobs needed to raise people to the poverty line. The figure for Africa alone is 18 million jobs per year. The food industry and food sectors at large can help provide these jobs, especially as the developing world urbanizes and as food consumption habits change. The way to provide decent jobs is to modernize food supply chains and support technical innovation in food processing and distribution and food services.
The creation of a modern food industry that can deliver on those promises requires sustained effort – for research and development to support innovation; through targeted subsidies, standards, and regulation; and through sustainable technologies, investment in infrastructure and inclusive agro-industrial business models, and long-term credit to emerging enterprises.

The Food Industries for People and Planet (FIPP) program aims to provide a knowledge base for action. Managed through a multi-disciplinary, multi-stakeholder research consortium, the program focuses on providing evidence-based research to build a healthy, inclusive, sustainable, and profitable global food future. The FIPP program aims to shift the global conversation from simply the cost of food to the true value that safe, nutritious, sustainably produced food can provide for all.

Changing analytical lenses

Food policy research has long focused on agricultural development, staple crop value chain analysis, and nutrition studies. A stronger focus on the midstream of the food chain will require new analytical lenses:

- **Demand-side lens**: Dietary change and shifts in food consumption demand have major implications for the entire food value chain, but particularly for the types of products and services that the midstream is supposed to deliver. Traditional value chain analysis approaches focus too much on value addition of staple crops; in contrast, modern food system trends are stemming much more from a combination of food product development and consumer preferences, such as demand for improved food safety and quality. Addressing this new trend requires linking consumer behavior to supply chain dynamics in the midstream and taking a different approach to value chain analysis, i.e. one that focuses on the product cycle from the perspective of food as an endproduct for consumers and that focuses on product differentiation. Through this demand-side-driven lens, the FIPP program will examine:
  - What do consumers want, and how do these wants change in different locations and at different stages of economic and social development?
  - How are urbanization and income growth patterns changing dietary preferences?
  - How do these changes in consumption demand impact the production, processing, transportation, marketing, and distribution and sale of food and food products?

- **Firm and market structure lens**: The program needs a better understanding of firm behavior to be able to understand changes in market structures in the midstream.
  - What impacts does the growth of modern, large-scale food processing and wholesaling have on food production and consumption?
  - How does the “quiet revolution” of increased small- and medium-sized enterprises (SMEs) fit within the modernizing food system?
  - How are these different food systems interacting? Are they competing or complementary?

- **Global and local lens**: The modern revolution in food systems has progressed farthest in developed countries, but it also illustrates the dynamics that we expect are happening in developing countries at a likely accelerated pace. The FIPP program will examine both the workings of global food value chains and local food value chain contexts in order to understand how these multiple value chains are interacting and influencing one another.
• **Food output and input market interdependence lens**: Dynamics in the midstream of food systems, including vertically integrated firms and disruptive technologies, are causing shocks to input and factor markets (use of fertilizer and pesticides, IT technologies, labor and capital reallocation, rental markets for equipment, labor-saving technologies, credit supplies, etc.). The FIPP program will examine the interactions of these various markets, including:
  - How do capital and technology markets affect the food system, particularly the midstream actors?

• **Spatial lens**: Changes in food systems are heterogeneous, differing by geographic context. Many of these dynamics are territory bound (urban/peri-urban/rural interactions, agro-ecological zones, etc.). Thus, territorial-based analysis approaches are needed to identify context-specific bottlenecks to food system development, including natural resources, conflicts over use of land and water, and infrastructure deficiencies.

• **Sustainability lens**: Environmental costs will need to be fully internalized in the valuation of food. This, in turn, should help policymakers and researchers to identify and address trade-offs when trying to reshape food systems to provide healthier diets, more and better jobs, and minimal environmental pressure.

Analysis of policies and investments will need to be adjusted to align with these lenses. The FIPP program needs better measurement of the food system in order to map out the importance of the midstream of food supply systems and to better identify trends and changes in markets and technologies that matter for key impact variables, such as employment, nutrition, and environmental stress. Improved data should help researchers and policymakers to analyze value chains as a whole and from a food product cycle, as well as from a food company perspective. To provide analysis from these multiple perspectives, the FIPP program should deploy an ample range of methodologies, from randomized control trials with a local focus to large surveys examining national trends to company-level business and marketing analyses.

**Clearer description of research areas**

During the Roundtable, several suggestions were made to sharpen the titles of the three proposed core research areas for the FIPP program. As originally proposed, these areas read as follows: (1) improving agri-food market efficiency and access; (2) innovation for inclusive agri-food value chains development; and (3) incentives for safer, healthier and sustainable food.

To highlight the focus on the midstream, these research areas could be defined as follows: (1) reshaping agriculture to supply fast-industrialising food systems; (2) creating jobs along inclusive agri-food supply chains; and (3) incentivising food system actors to deliver are safer and healthier food for people and planet.

During the follow-up to the Round Table, the coordinators of the FIPP program will further sharpen these three focus areas.
In this first session, the broader motivation for the research program was discussed. In addition, the proposal to form a multi-stakeholder Research Consortium was introduced. Several key points emerged. First, the food industry holds vast potential for development, particularly through the creation of jobs. However, the modern food industry, with its emphasis on processed foods and longer supply chains, can also have negative implications for health and nutrition outcomes and the environment. The world needs to make the shift to a benign food system that captures the benefits of modernization (like easier access to food, greater nutritional diversity and food safety, and new jobs in the downstream of value chains), while avoiding negative aspects (like promotion of unhealthy diets, environmental degradation, conflict over resources, etc.).

To fully examine this complex area, several interventions were emphasized. The FIPP program will need to take a global perspective, looking at trends in both developed and developing countries and at the increasingly important role of trade and global food value chains.

In addition, different skillsets and expertise will need to complement traditional research approaches focused on farming and nutrition analysis. Vertical integration of food chains, food product branding, increasing influence of large market players, etc. will require engagement with the private sector to better understand firm behavior, marketing and business strategies, contract choice, and trends in consumer behavior. Such understanding is essential to understand how regulatory and policy environments can enable producer and consumer choices for healthy, nutritious, and sustainably produced foods.

Second, participants in this session further highlighted the importance of the “quiet revolution” of small- and medium-sized enterprises (SMEs) and stressed the need to make sure that the focus is not placed solely on large multinational businesses, like Pepsico or Unilever. SMEs are growing in importance, particularly in developing countries; however, food security laws have put many small firms out of business because they cannot meet stricter food safety and quality standards. How can the FIPP program help these businesses transition to meet new quality and safety requirements? In addition, young populations may have trouble entering the modern food system as workers due to increased need for skills. How can the FIPP program help young people find employment in the food supply chain?

A third recurring theme in this panel was the need for clear definitions. What is meant by food industries? What is meant by food systems? What is the difference between the two concepts, and how can the FIPP program make that clear moving forward? This idea of clear nomenclature was repeated throughout the day.

Fourth, participants highlighted the need for more and better data and information on the midstream of the food sector, both for researchers to understand what is really happening on the ground in terms of demand- and supply-side trends and for consumers to make more informed choices about the foods they eat.

In the wrap-up of the session, it was emphasized that there is a clear need to connect research on agriculture and farm systems to food and nutritional outcomes by focusing more research on the midstream of the food system (processing, distribution, food services, etc.). In doing so, researchers should try to disentangle: 1. how technological innovations and change in market structure and organization in
the midstream of food supply chains are influencing both consumer choices and farm systems and 2. to what extent food demand shifts prompt changes in supply chains.

**Panel Session 2**

This session began with reiteration of the need for clear, commonly agreed-upon language to define where the FIPP Research Consortium will fit into the sustainable food system conversation. Several speakers reiterated the need to develop a new narrative when talking about the global food system, one that takes into account how agriculture, nutrition, and sustainability – the traditional purview of the development sector – are linked to businesses, marketing, and profits. The need for a stronger focus on the demand side of the food system was particularly emphasized, including the need to focus on nutrition and dietary diversity (fruits and vegetables, pulses, and whole grains, as well as healthy processed foods). While many studies and policies focus on increasing market efficiency for staple crops, a focus on agrobiodiversity and dietary diversity is needed if improving nutrition is a goal of the program. Accordingly, researchers should focus on what types of incentives would drive consumer and business choices in favor of healthier and more sustainable food system outcomes. Political economy considerations should also be an essential ingredient in order to come to realistic, policy-relevant findings. In this same vein, it would be useful to include quality assessments of policy and regulatory failures: what went wrong, and how can policymakers avoid making the same mistakes?

Finally, the importance of engaging the private sector was reiterated. The program will need to balance healthy diets with sustainability and profits to ensure that multiple stakeholders are willing to invest in improving the global food systems.

**Panel Session 3**

Much of the discussion during this session centered on food quality and safety regulations, specifically through product certification and labeling. Certification and quality regulations can increase food safety and quality for consumers and, also, have the potential to help producers enter more competitive and lucrative markets. However, such standards may also be too expensive for SMEs to abide by, thereby limiting market opportunities for these important food system actors. Participants discussed the need to consider economies-of-scale when it comes to certification, acknowledging that SMEs may not be able to effectively engage in certified products; this reiterates the need for the FIPP program to engage with larger food businesses as well as SMEs.

In addition, certifications and standards may incentivize farmers to focus on a particular commodity, thus reducing overall diversity in food production. Farmers and farmers’ cooperatives may also engage in side sales, which can affect loyalty between farmers and buyers and thus cause certified products to lose their credibility in the market.

Hence, both research and policy debates should go beyond certification to an overall upgrading of value chains, both global and regional. Looking at the interaction between these value chains can help identify ways to increase the bargaining power of smallholders and other SMEs along food supply chains. Participants also highlighted the need to consider laborers in this examination of the value chain, looking specifically at wages and working conditions for workers in the farm and non-farm food sectors.

The question was also raised as to whether successful inclusive business models exist to bring women, youth, and vulnerable populations into food value chains.
To properly study all of the related processes along the value chain, more data are needed. These will have to come from a variety of linkable sources to provide a comprehensive picture of the size, nature, and market structure of the food sector in the various stages of the supply chain. It was suggested that an important contribution of FIPP would be to develop a database that would yield indicators on the size of the food sector (in terms of GDP, employment, etc.) and degrees of market concentration and integration along the various stages of the supply chain.

Finally, participants again stressed the need to look at value chains from a different perspective, one that starts with the market for food products and works backward to the primary producers. While productivity is important to development, there was a sense that it may have been overemphasized and that the program needs to better understand market demand to help producers determine what to produce.

**Panel Session 4**

Incentives played a leading role in the discussion in this session – specifically how to incentivize consumers to make healthier food choices and how to incentivize businesses and policymakers to invest in producing more nutritious, sustainable foods. A key question raised referred to the traditional carrot-or-the-stick debate—that is, whether to focus on punitive measures to change consumer behavior, such as sales taxes for sugary beverages or explicit labelling of fatty snacks, or on positive incentives, such as nutrition education campaigns, subsidies of healthy foods, or certification of sustainably produced foods.

It was emphasized that nutrition has a strong link to economic outcomes – poor diets lead to lower productivity (both agricultural and labor). Governments often have to spend more public resources to address the results of unsafe, unhealthy, and unsustainable diets, including increased healthcare costs, lost wages, soil degradation, etc. Providing stronger evidence regarding the costs of poor nutrition and diets can help encourage policymakers to fund nutrition programs.

Marketing plays a key role in changing consumer behavior when it comes to food choices. For example, foods that are biofortified with vitamins and minerals, such as vitamin A or iron, provide more nutrition; however, consumers may not choose to eat biofortified foods for a variety of reasons. They may be hesitant to try new, non-traditional foods, or they may not realize that a certain food is healthier because its nutrition traits are invisible. Using marketing channels such as radio or television to educate consumers regarding healthier foods can be effective in changing consumer behavior. With this in mind, the FIPP program will need to engage with private sector companies, which often have strong data regarding consumer demand and preferences and strong knowledge regarding effective marketing strategies.

In order for private sector food businesses to shift their portfolios toward more nutritious, sustainable foods, strong evidence is needed to show that they can do so in a way that is still profitable. Producers also need incentives to grow more nutritious crops, particularly those with invisible beneficial traits, as adoption of improved crop varieties tends to die off without continuous support.

The issue of market access was also raised in this session because as people’s market access increases, they tend to diversify their diets. Participants also emphasized the need to take into account laborers in informal non-agricultural sectors; these populations tend to be vulnerable to food insecurity and to rely on convenient, processed foods.
Panel Session 5

In this wrap-up session, participants focused on clarifying the priorities for the FIPP program and on determining the best ways to move forward. A revision of FIPP’s three research themes was suggested: 1. delivering growth, jobs, and sustainability in rapidly industrializing food systems; 2. shaping agriculture to supply rapidly industrializing food system; 3. incentivizing food systems that are safer and healthier for people and planet. It was also suggested that the focus on “people and planet” be extended to include “prosperity and peace”.

Participants emphasized that FIPP should not take a “one size fits all” approach to its analysis of the food system; rather the program must traditional, mixed, and modern food systems and must involve close collaboration among multiple actors. There is untapped potential for public-private partnerships both to drive innovation and to reduce the risk involved in investments. In order to take advantage of this potential, the FIPP program should put emphasis on food company/business case analyses and include business metrics to support its research agenda. The research should also aim to identify successful organizational models for agri-food business development that can be scaled up (horizontal and vertical strategies).

The program also needs to acknowledge that there will be trade-offs to making the food system healthier and more sustainable and needs to focus on helping policymakers understand and deal with those trade-offs.

The Round Table concluded with a strong recognition that a collaborative effort is needed, that the food industry is a critical topic, and that the midstream of the food value chain is where many dynamic changes are taking place. The FIPP program does not aim to replace or recreate the current research agenda, but rather to fill the critical knowledge gap in better understanding the dynamic changes taking place in the midstream of food sectors to underpin evidence-based interventions for a food system that truly works for people’s and the planet’s health and prosperity.
Research Day

The Research Day sessions mirrored the research areas organized during the Round Table event. The day’s presentations included discussions on:

- Dynamic changes in the midstream (quiet revolution), innovation and technology change;
- How these changes are affecting not just individuals but also the planet;
- The definition and measurement of food loss and waste, as well as where losses occur along value chains and potential interventions to mitigate those losses;
- Importance of crop insurance and other interventions that promote climate-smart agriculture and risk management;
- Demand for food safety and ways to incentivize production of safe foods;
- Policies addressing unhealthy diets and global burden of disease;
- The role of regulation and certification in improving food safety and quality;
- Gaps in knowledge regarding trends and differences, specifically whether the food sector is the mainstay for future employment and income generation in various countries;
- Better/different measurement of food chains (particularly the midstream); and
- How to design a new approach to value chain analysis, stemming from a food system perspective.

You can find the presentations from the Research Day sessions here.

Keynote address

The day began with a keynote address by Prof. Thomas Reardon of MSU. He reiterated that although food security debates have largely focused on the farm, the food system comprises of upstream, midstream, and downstream components that are all equally important. To date, however, little research has focused on the midstream, which comprises 40% of the overall food system. Issues related to the midstream include rapid urbanization, lack of developing country exports, high consumption in urban areas, rise of secondary cities, rise of purchased food in total rural food expenditures, rise of processed foods, rise in consumption of processed foods, rapid diversification beyond grains, and significant rise in SMEs involved in the production of perishable foods.

The world is also experiencing a “quiet revolution” involving SMEs joining midstream value chain sectors. As value chains become longer, more complex, and more diversified, there comes the need for researchers and policymakers to look at the whole value chain as the unit of analysis, rather than looking simply at production.
Concluding discussion

In the final session of this two-day FIPP event, several main themes were again reiterated. Specifically, participants stressed the need for a clear vision, focused priorities, and inclusiveness. The key takeaways from this discussion were spelled out above in the “Summary” section above.
Challenges and questions to be addressed

Throughout the Round Table and Research Day events, participants highlighted several challenges and questions to be addressed as the FIPP program develops.

First, a clearer use of nomenclature is needed. What is meant by food industry? What is the difference between food industry and food systems? What is meant by value chains, and which specific value chains should the program focus on? What is meant by food waste?

Second, the program needs to further narrow down its priority research areas and focus. The issue of food industries is vast and complex, and not all aspects can be covered by a single research program. Questions to consider include whether the program will include nutrition and the environment or whether it will be focused solely on economic development (incomes). There was strong feeling throughout the two days that nutrition and environmental concerns had not received sufficient attention. The question also arose of how the program will examine infrastructure, as this plays a crucial role in the creation of jobs in sectors related to the food industry, including the energy and transportation sectors.

Third, the FIPP program needs to be defined more clearly in terms of how it will fit in with and relate to ongoing work. It should not duplicate existing efforts, but rather provide innovative analysis and a fresh perspective on the rapidly growing and changing food industry.

Finally, it is essential that the FIPP program be made truly inclusive, in terms of both who is involved in the Consortium and whom the research targets.

Next steps

As the first next step, the FIPP team at IFPRI will extend an invitation to various public, private, and civil sector actors to join the Research Consortium. Alongside, a book or special journal issue will be prepared based on the research presented during the FIPP Research Day.
Annex 1: Agendas for Round Table and Research Day

Round Table
Food industries for people and planet: Toward a new research agenda
25 June 2018
IFPRI, Conference Room 12A
1201 Eye Street NW, Washington D.C. 20005

Background
The International Food Policy Research Institute’s (IFPRI) new research program on “Food industries for people and planet” (FIPP) will expand traditional ways of thinking about the global food system and will provide evidence-based policy assessments aimed at making agri-food industries and food systems more inclusive in terms of employment and income opportunities, more efficient in terms of meeting global food needs, and more conducive to the promotion of healthy diets and environmentally sound production and distribution systems.

Agenda

08:30 – 8:55   Registration and light breakfast

Session One | Overview: Challenges and opportunities
09:00 – 10:30
This session will provide an overview of the background for the program, its proposed main research areas, and the key challenges and opportunities presented by the modern food industry.

- Which factors should concern researchers and policymakers?
- How are food businesses positioning themselves?
- To what extent are changing dietary patterns shaped by consumer taste and preference, and to what extent are they shaped by changes in the modern food system itself?

Chair
Eugenio Diaz-Bonilla, Director, Latin America and Caribbean, IFPRI

Lead speakers (7 minutes each)
Rob Vos, Director MTID and leader FIPP program, IFPRI
Simon Maxwell, IFPRI Board
Tom Reardon, Michigan State University
Leonard Mizzi, European Commission

Round table discussion (60 minutes)
Session Two | Improving agri-food market efficiency and access: Challenges and opportunities

10:30 – 12:10

This session will assess the challenges and opportunities presented by the ongoing horizontal and vertical restructuring and integration of food chains.

- Are changes in agri-food markets happening uniformly? What opportunities do these changes create? What concerns do these changes raise, and how important are those concerns?
- Do changes to the global food system affect market efficiency? If so, can policies designed to stimulate competition help reduce market inefficiencies?
- How and where are investments and innovations in R&D for agriculture and food technologies taking place? What should we expect from disruptive technologies (such as new food technologies, blockchain technology in marketing; etc.)? How will these technologies affect farming systems? Will they accelerate dietary changes?
- What policies are needed to reduce the vast food loss and waste that exists both upstream and downstream in the agri-food industry?

Chair
Ertharin Cousin, Stanford University

Lead speakers (7 minutes each)
David Zilberman, University of California at Berkeley
David Bennell, World Business Council for Sustainable Development
Maximo Torero, World Bank
David Neven, FAO (remote participation)

Round table discussion (60 minutes)

12:15 – 13:15 Lunch

Session Three | Innovation for inclusive food value chain development

13:15 – 14:45

This session will examine the conditions needed for the food system to fully tap into the employment- and income-generating potential of well-developed food chains while still allowing for the achievement of global food security and sustainability objectives.

- Do effective and inclusive business models exist to help smallholder farmers and small-scale food processors and distributors gain from connections to large players in the modern agri-food
industry?

• Can agri-food business development play a role in solving Africa’s and South Asia’s youth employment challenges? How can agri-food business development economically empower rural women?

• How can disruptive IT technologies be used to drive inclusive agri-food value chain development? What should public policies do to enable such technological contributions?

• Can product certification and labelling for food safety and quality, smallholder origin, and/or environmental sustainability promote inclusive value chain development?

• Can weather and income-risk insurance help create greater resilience along agri-food value chains?

Chair
Louise Fox, USAID

Lead speakers (7 minutes each)
James Thurlow, IFPRI
Gerd Fleischer, GIZ
Stephen Gelb, Overseas Development Institute
Ruerd Ruben, Wageningen Economic Research
Tanguy Bernard, IFPRI

Round table discussion (60 minutes)

Session Four | Incentivizing food that is safer and healthier for people and planet
14:45 – 16:15

Changes in the structure of the modern food industry also bring impacts on human health and the environment, both with potentially substantial economic cost. This session will build on IFPRI’s expertise in nutrition and environmental issues to explore the following research questions:

• What drives people’s food choice in developing countries? What role does marketing by the private sector, as well as taxes and incentives and larger macroeconomic policies established by the public sector, play in the creation of consumer demand?

• How can traceability and technology use support food safety? What is the potential for public-private partnerships (PPPs) for nutrition and food safety?

• What factors pose constraints to the uptake of biofortified foods by both producers and consumers? How can such constraints be addressed?

• What are the macroeconomic costs, both global and national, of the health impacts of food safety risks and the triple burden of malnutrition and of the environmental impacts of shifting demand toward processed foods and agricultural commodities?

Chair
Gina Kennedy, Biodiversity International

**Lead speakers (7 minutes each)**

Emmy Simmons, GLOPAN  
Howarth Bouis,  
HarvestPlus Maggie  
Biscarr, Pepsico  
Dan Gilligan, IFPRI

**Round table discussion (60 minutes)**

16:15 – 16:30 Refreshments

**Session Five | Closing session: Setting priorities for policies and research: Industrial development for food that is safer and healthier for people and planet**

16:30 – 17:30

To properly address all of these questions, policymakers and researchers will need to take a food-system-wide approach that promote inclusive and sustainable development of agri-food systems and that steer consumer behavior and food preferences toward healthier diets.

- Will better integrated and system-wide food policies be sufficient to change producer and consumer behavior in favor of healthier, more sustainable practices? Will multi-stakeholder agreements be necessary to ensure effective collective action for change?
- What does a food system approach imply for the structure of research on the food industry? What options exist to fund larger, multi-disciplinary research teams to evaluate global value chains?
- Integrated policy frameworks will require a stronger evidence base. While some efforts are underway to compile components of data on modern food systems, a system-wide analysis has still not been undertaken. Should the FIPP program undertake a major initiative to compile current databases along the value chain in order to develop food-system-wide databases?

**Chair**

Simon Maxwell

**Lead speakers (7 minutes each)**

Leonard Mizzi, European Commission  
Eric Trachtenberg, Millennium Challenge Corporation  
Eelco Baan, SNV  
Laura Birx, Gates Foundation Babatunde
Omilola, UNDP

Round table discussion (30 minutes)

Closing remarks
17:30 – 17:35
Rob Vos, IFPRI

17:35 Reception
Research Day

Food Industries for People and Planet

26 June 2018

IFPRI, Conference Room 12A

1201 Eye Street NW, Washington D.C. 20005

Background

The International Food Policy Research Institute’s (IFPRI) new research program on “Food industries for people and planet” (FIPP) will expand traditional ways of thinking about the global food system and will provide evidence-based policy assessments aimed at making agri-food industries and food systems more inclusive in terms of employment and income opportunities, more efficient in terms of meeting global food needs, and conducive to the promotion of healthy diets and environmentally sound production and distribution systems.

Building on its comparative advantages, IFPRI and its partners will focus on three interrelated areas of research (see Annex for further background to these research areas):

(1) *Improving agri-food market efficiency and access*: This research area will focus on understanding the impact that the changing agri-food industry has on market access, food prices, technology adoption, and market interlinkages (e.g. land, credit, and output markets), as well as the role that policymakers can play in influencing these changes.

(2) *Innovation for inclusive agri-food value chains development*: In the context of changing food markets, this research area will assess the effectiveness of policy options to create more inclusive, well-developed food value chains that can also help meet global food security and sustainability targets, as defined through the Sustainable Development Goals.

(3) *Incentives for safer, healthier and sustainable food*: This research area will focus on understanding the risks posed by food system developments to food safety, the environment, and nutrition and on assessing the potential of innovative policy approaches to mitigate these risks and leverage change for better nutrition and health and food system sustainability.

Workshop objectives

The workshop will provide a platform to discuss existing research related to the above-mentioned areas in order to take stock of the state of the art of available and ongoing research and to identify needs for new research directions and explore possibilities for collaborative policy- and action-oriented research. These findings will be used to further shape the FIPP program and forge partnerships for its implementation.

As a further outcome, the papers (or a selection of them) will be bundled into a book publication (or
Workshop setup

The workshop will kick-off with an overview study prepared by Thomas Reardon (Michigan State University) for the event. The paper will provide a synthesis of recent evidence and analyses of the industrialization of food systems as this is taking place in different parts of the world and lay out some of the more specific knowledge gaps and research challenges which the FIPP program would need to consider. During the first session Reardon will introduce his paper followed by discussion. The subsequent three sessions will be devoted to presentations and discussions of papers that address issues related to the three key research areas indicated above. Each of those sessions will include one or two invited papers and a number of papers selected from a call for papers. In the final session, conclusions of the workshop deliberation will be drawn for the research orientation of the FIPP program and areas for research collaboration among partner institutes and agencies.

Program

| Light Breakfast – 8:30– 8:55 |
| Panel Session 1 – 9:00 – 9:45 |

**Food Industries for People and Planet: what are the issues?**

Moderator: *Rob Vos (IFPRI)*

**Keynote address:**

Food industries and transformative change upstream and downstream food systems

*Thomas Reardon, MSU*

Discussant: *Maximo Torero* (World Bank)

| Panel Session 2 – 9:45 – 11:00 |

**Improving agri-food market efficiency and access: Challenges and opportunities**

Moderator: *Eric Trachtenberg (MCC)*

**Panel presentations:**

Technology and innovation in food supply chains: theory and practice

*David Zilberman, UC at Berkeley*
Implications of Africa’s unfolding diet transformation for farm employment: Evidence from Tanzania  
*David Tschirley, MSU*

Science, innovation, and competition: What the life sciences industry growth, public policy, and regulation mean for developing-country food systems  
*David Spielman, IFPRI*

Discussants: *Stephen Gelb (ODI), David Neven (FAO)*

Coffee break – 11:00– 11:15

| Panel Session 3 – 11:15 – 12:15

**Innovation for inclusive food value chain development**

Moderator: Eelco Baan (SNV)

**Panel presentations:**

Transformative changes in dairy value chains in Uganda and Ethiopia  
*Bart Minten, IFPRI*

Effectiveness of standards and certification for reinforcing tropical supply chains  
*Ruerd Ruben, Wageningen Economic Research*

Insurance and risk management tools for resilient food systems  
*Berber Kramer, Francisco Ceballos and others, IFPRI*

Discussants: *Karen Brooks (IFPRI), Gerd Fleischer (GiZ), James Thurlow (IFPRI)*

Lunch – 12:15 – 13:15

| Parallel Sessions – 13:15 – 15:15
| 1 | Improving agri-food market efficiency and access: Challenges and opportunities | 2 | Innovation for inclusive food value chain development | 3 | Incentivizing food that is safer and healthier for people and planet |
|---|---|---|---|---|
| **Moderator:** Ruerd Ruben/Rob Vos Conference Room 12E | **Moderator:** David Spielman Conference Room 12F | **Moderator:** Gina Kennedy Conference Room 12G |
| Estimates and affluence elasticity of consumer food waste | Gendered milk markets in peri-urban Nairobi | Weight gains from trade in foods: Evidence from Mexico |
| *Monika Verma, Wageningen Economic Research* | Alessandra Galie, ILRI (Steven Staal presenting on behalf) | *Matthias Rieger, International Institute of Social Studies* |
| Implementing the Dry Chain to Reduce Postharvest Commodity Losses and Improve Food Safety | What is the role of men in connecting women to cash crop markets? Evidence from Uganda | Food Consumption and Household Expenditure Variability: Evidence from Nigeria |
| *Kent Bradford, UC Davis* | *Kate Ambler, IFPRI* | *Sylvan Herskovitz and Alan de Brauw, IFPRI* |
| Assessing determinants of food loss along the food chain: Implications for policy research | Options for Reducing Poverty in Remote Areas of Northern Ghana: Can Maize Contract Farming Schemes Help? | Recapturing vegetable phytonutrients for healthier diets |
| *Eduardo Nakasone, MSU and Options for Reducing Poverty in Remote Areas of Northern Ghana: Can Maize Contract Farming Schemes Help?* | *Catherine Ragasa, IFPRI* | *Ray-Yu Yang, World Vegetable Center* |
| Imperfect competition in fertilizer markets: implications for output markets and food security | Improving trust and reciprocity in agricultural input markets: A lab-in-the-field experiment in Bangladesh | Analysis of perceived risk on consumers’ confidence in food safety practices: Evidence from Ghana |
| *Manuel Hernandez, IFPRI* | *Berber Kramer, IFPRI* | *Carl Johan Lagerkvist, Swedish University of Agricultural Sciences* |
| Overcoming the challenges for large-scale utilization of ready-to-eat fish products for nourishing nations | Demand for aflatoxin-safe maize in Kenya: Dynamic response to temporary discounts and advertising |
| *Shakuntala Haraksingh Thilsted, WorldFish* | *Vivian Hoffman, IFPRI, Christine Moser and Tom Herrman* |

Coffee break – 15:15– 15:30
Session 4 – 15:30 – 17:00

Incentivizing food that is safer and healthier for people and planet

Moderator: Emmy Simmons (GOPAN)

Panel presentations:

Unhealthy diets and the global burden of disease: food policy implications?
Ashkan Afshin, Institute of Health Metrics and Evaluation (IHME), University of Washington

Effectiveness of sugar taxes on dietary outcomes: The case of Guatemala
Valeria Piñeiro, Lionel Cosnard, Flor Paz, Summer Allen, Eugenio Diaz-Bonilla, IFPRI

Demand for porcine cysticercosis vaccine in Uganda: Lessons and insights
Steven Staal

Discussants: Harold Alderman (IFPRI), Gina Kennedy (Biodiversity)

Session 5 – 17:00 – 17:30

Lessons for further research and research collaboration

Concluding remarks and next steps

Thomas Reardon and Rob Vos

Reception – 17:30 – 18:30
Annex 2: Participant List

Leonard Mizzi, European Commission
Ertharin Cousin, Stanford University
David Zilberman, University of California at Berkeley
David Bennell, World Business Council for Sustainable Development
Maximo Torero, World Bank
Louise Fox, USAID
Gerd Fleischer, GIZ
Stephen Gelb, Overseas Development Institute
Ruerd Ruben, Wageningen Economic Research
Gina Kennedy, Biodiversity International
Emmy Simmons, GLOPAN
Howarth Bouis, HarvestPlus
Maggie Biscarr, Pepsico
Eric Trachtenberg, Millennium Challenge Corporation
Eelco Baan, SNV
Laura Birx, Bill and Melinda Gates Foundation
Babatunde Omilola, UNDP
Tom Reardon, Michigan State University
Kent Bradford, University of California Davis, World Food Center
David Tschirley, Michigan State University
Monika Verma, Wageningen Economic Research
Steven Staal, ILRI
Shakuntala Haraksingh Thilsted, World Fish
Ray-Yu Yang, World Vegetable Centre (AVDRC)
Ashkan Afshin, Institute of Health Metrics and Evaluation (IHME), University of Washington
Leonard Ziljstra, ICCO
Karen Brooks, PIM
Trent Blare, ICRAF
Mar Maestre Morales, Institute of Development Studies
Rob Henning, Foundation for a Smoke-free World
Gene Moses, IFC
Geraldo Martha, EMBRAPA
Wijnand van Ijssel, World Bank Group
Simon Maxwell, ODI
Eugenio Diaz-Bonilla, IFPRI
James Thurlow, IFPRI
Tanguy Bernard, IFPRI
Dan Gilligan, IFPRI
Bart Minten, IFPRI
David Spielman, IFPRI
Summer Allen, IFPRI
Berber Kramer, IFPRI
Vivian Hoffmann, IFPRI
Kate Ambler, IFPRI
Alan de Brauw, IFPRI
Harold Alderman, IFPRI
Teunis van Rheenen, IFPRI
Catherine Ragasa, IFPRI
Sylvan Herskowitz, IFPRI
Nick Minot, IFPRI
Valeria Pineiro, IFPRI
Manuel Hernandez, IFPRI
Simla Tokgoz, IFPRI
Carl Johan Lagerkvist, Swedish University of Agricultural Science
Matthias Rieger, International Institute of Social Studies
Md. Fazle Wahid Khondaker, Additional Secretary, Bangladesh Ministry of Agriculture (MOA)
Abdul Halim, Research Director, Agricultural Policy Support Unit, Bangladesh MOA
Annex 3: FIPP Multistakeholder Consortium (FIPP-MSC)

About the Consortium

Initiated by the International Food Policy Research Institute (IFPRI), the Multi-Stakeholder Consortium promoting Food Industries for People and Planet (FIPP-MSC) aspires to foster policy research partnerships and promote original thinking and innovative practice in an effort to achieve food systems that provide for healthy diets, that are environmentally sustainable, and that foster inclusive economic welfare and poverty reduction.

The FIPP-MSC has more than 20 founding members from around the world (see Appendix), representing the food policy research community, development agencies, agri-food businesses and other private sector agents, and UN agencies. The Secretariat of the Consortium is housed in IFPRI Headquarters in Washington, D.C.

The Consortium was initiated at the first FIPP Roundtable meeting held at IFPRI Headquarters in Washington, D.C. on 25 June 2018. This important event was attended by more than 50 researchers, practitioners, and policy makers from research institutes, think tanks, international organizations, private companies, and development agencies.

Objectives

The Consortium aims to become a key provider of knowledge and evidence on changing food systems, particularly regarding the role of the “midstream” stage of food supply chains (food distributors, industries, and service providers).

The Consortium will promote the implementation of the research program, Food Industries for People and Planet (FIPP), and act as an interface between research and implementation.

The FIPP program will provide evidence-based policy assessments to make agri-food industries and food systems worldwide more inclusive in terms of employment and income opportunities, more efficient in meeting the food needs of the growing global population, and more conducive to the promotion of healthy diets and environmentally sound food systems.

Partners of the FIPP-MSC will jointly develop the components of the FIPP research program and share and disseminate key research findings and policy advice. They will also jointly seek funding to support the operations of the Consortium.
Why join the FIPP-MSC?

1. The FIPP-MSC will be the only multi-stakeholder platform in the world that focuses research and policy dialogue on the midstream of food supply chains.
2. It will be a platform to bridge knowledge gaps and link think tanks and organizations involved in implementation of the program.
3. It will provide a platform for knowledge and information sharing, research collaboration, and policy dialogue among leading experts, private and public sector stakeholders, and leading development partners.

Membership

- All organizations who attended the Roundtable on June 25 are invited to join the FIPP-MSC
- Additional organizations can be added by submitting a written request to the FIPP-MSC Secretariat. Before adding new members, existing partners will be consulted.

Moving forward

The FIPP-MSC will:
- meet virtually (webinar) on a quarterly basis to discuss progress and upcoming opportunities;
- organize an annual conference at rotating locations;
- The Secretariat will develop a website that will serve as a platform for knowledge and data sharing, virtual discussions and policy dialogues, and upcoming opportunities.

Secretariat

- The FIPP-MSC will have a very small Secretariat to be housed at IFPRI HQ
- The Terms of Reference for the Secretariat will be developed to be shared agreed with the members.
- Estimated initial budget to cover the cost of the Secretariat is USD 100,000 per year. The budget would be used to set up and maintain the website of the Consortium, facilitate and coordinate networking and joint resource mobilization activities, and coordinate meetings of the Consortium.
- Each member will be asked to make a contribution to cover these costs.

For additional information, please contact: Rob Vos, Coordinator FIPP program and Director Markets, Trade and Institutions Division at IFPRI (ifpri-fipp@cgiar.org).
Appendix: FIPP Founding Institutions (provisional, subject to confirmation)

Bill and Melinda Gates Foundation, USA
Biodiversity International
Directorate-General for International Cooperation (DGIS), Netherlands
European Commission, Directorate for Development Cooperation, Brussels
Food and Agriculture Organization of the United Nations (FAO)
Foundation for a Smoke Free World, USA
German International Development Cooperation (GIZ), Germany
Global Panel on Agriculture and Food Systems for Nutrition (GLOPAN), U.K.
HarvestPlus
ICCO, Netherlands
International Centre for Research in Agroforestry (ICRAF)
Institute of Development Studies, UK
Institute of Health Metrics and Evaluation (IHME), University of Washington, USA
International Food Policy Research Institute (IFPRI)
International Finance Corporation, World Bank Group
International Livestock Research Institute (ILRI)
Michigan State University (MSU), USA
Millennium Challenge Corporation (MCC), USA
Overseas Development Institute (ODI), U.K.
Pepsico, USA
SNV – Netherlands
Stanford University
United Nations Development Programme (UNDP)
USAID, USA
University of California at Berkeley, USA
University of California, Davis, USA
Wageningen Economic Research, Netherlands
World Business Council for Sustainable Development, Geneva
WorldFish
World Vegetable Centre (AVDRC)