## Action Plan Sustainable Trade 2011-2015: Programs for Upscaling



SECTOR	CONSUMER MARKET												PRODUCER MARKET			POLITICAL ARENA		
	Investments in Sustainability (€)  Public Private NGOs Other Donors		Importance of Sector for the Netherlands  Annual Position in World  Turnover (€)				tive Importance therlands in World Import EU Import NL		Business Drivers	MDG 1: Poverty Reduction and Social Agenda	MDG 7: Environmental Footprint	MDG 8: Sustainable Trade	Relevance & Opportunities	Key Partners (Potential)	Countries / Regions			
Cocoa (ongoing)	3.5 mln	2.5 mln	1 mln	Irish Aid, IFC, CFC	25 bln	No. 1 in the processing industry; 25% of import in the world	10,300	3.7 mln ton	1.6 mln ton	0.7 mln ton	Securing sourcing in the long term. Higher farm yields, better product quality and sustainable farming are vital to the future of the sector	20% increase in productivity for \$0,000 cocoa farmers by 2020. Promotion of ILO standards, improvement of gender equity, and contribution to the abolishment of child labour	150,000 ha sustainable land use by 2012	64,000 ton certified cocoa by 2012. Improved transparency and accountability. Strengthening and development of producer organisations. Creation of direct market links and access to finance	Bilateral cooperation with governments in West Africa. Replication of Dutch PPP to other regions. The Netherlands, together with other West-European countries, as leading countries in the drive for sustainability	Armajaro, ADM, Ahold, Barry Callebaut, Cargill, Cocoa Abrabopa, Ecom Agroindustrial, Ferrero, FrieslandCampina, Heinz, Jamin, Mars, Nestlé, Rabobank, Oxfam-Novib, Rainforest Alliance, Solidaridad, UTZ Certified, WWF	Ghana, Indonesia, Ivory Coast, Nigeria	
Cocoa (upscaling)	25 mln	300 mln	15 mln	GTZ 10 mln Gates Foundation 30 mln SECO 25 mln								Increased income for 500,000 farmers in West Africa in 2015	500,000 ha sustainable land use by 2015. Adaptation of cocoa production for climate change	15 - 20% of production sustainable by 2015. More than 50% certified in the Dutch market			Brazil, Cameroon, Colombia, Dominican Republic, Ecuador, Peru, Vietnam	
Tea (ongoing)	5 mln	5 mln	3 mln	AEFC 1 mln	1 bln	No. 5 in tea consump- tion in Europe; In top 10 in trade in the world	500	3.7 mln ton	0.2 min ton	27,000 ton	Concerns about long term sustainability of the supply base, due to potential climate change impacts and environmental challenges. Consumer drivers on both environmental and social issues	10% increase in yield and 5 - 20% increase in income for 350,000 farmers by 2013. Improved labour rights and fair wages	150,000 ha sustainable land use by 2013. Reduced use of chemicals, improved watershed management and prevention of deforestation	310,000 producers certified. Access to the high quality tea market for smallholders. Participating companies make commitments to buying certified tea	The Netherlands, together	Ahold, Drie Mollen Holding, Elink Schuurman, Ethical Tea Partnership, KNVKT, Sara Lee, Simon Levelt, Tata, Taylors, Twinings, Unilever, Both Ends, CNV, Falifood, LIW, Oxfam-Novib, Rainforest Alliance, Solidaridad, Somo, Tropical Commodity Coalition, Traidcraft, UTZ Certified, Wageningen UR	China, India, Indonesie, Kenya, Sri Lanka, Vietnam	
Tea (upscaling)	7 mln	12 - 15 mln	5 mln	Indian Tea Board 2 mln DFID 10 mln								10% increase in yield and 5 - 20% increase in income for 550,000 farmers by 2015	500,000 ha sustainable land use by 2015	50% of European tea companies buy/sell certified tea in 2015			Mozambique, Rwanda, Tanzania, Zimbabwe	
Soy (ongoing)	0.23 mln	0.11 mln	0.12 mln	SECO, GTZ, LNV		No. 2 importer in the	7,000	240 mln ton	34.4 mln ton	8.9 mln ton	Public concern on deforestation. Soy is a critical raw material for animal protein	Improved production practices and legalisation of workers (implemen- tation of ILO standards)	Protection of 250,000 ha tropical forest and HCVAs. Additional 800,000 ha sustainable land use by 2015. Responsible use of insecticides, soil and water	100% of Dutch processing and consumption of soy is sustainable by 2015 (>1.65 mln ton). By 2015 20% of Global Trade is RTRS certified	Soy is a critical commodity in various government policies such as Biodiversity Program, deforestation, protein debate, biofuels. Also key to EU policy for biofuels	Round Table of Responsible Soy (RTRS) and its members	China, India, Latin America	
Soy (upscaling)	10 mln	25 - 35 mln	6.25 mln	IFC, SECO, GTZ, LNV	3.2 bln	world; No. 1 importer in Europe										ADM, Agrifirm Group, Ahold, Amaggi, Bemefa, Bunge, Cargill, CBL, Cefetra, Fefac, Fediol, FrieslandCampina, Gebr. van Beek, IDS, Nevedi, Nutreco, Productschap MVO, Rabobank, Shell, Storteboom, SLC Agricola, Unilever, VION, IUCN, FNV Bondgenoten, Solidaridad, WWF	Argentina, Bolivia, Brazil, Paraguay, Uruguay	
Natural Stone (ongoing)	0.4 mln	0.2 mln	0.05 mln	-	340 mln	No. 7 importer in Europe	3,200	€ 16 bln	€ 4 bin	€ 260 mln	Public procurement policies are increasingly asking for sustainably produced natural stone	Improved living and working conditions for 800 workers in India and China. Abolish child labour	Improved management of water, waste water, material	Development of a label for sustainably produced stone	Public procurement policies. 75% of Dutch municipalities purchase	ABNN, Arte, Beltrami, Hofman, Febenat, Michel Oprey & Beisterveld, Struyk Verwo Infra, RMP Grafmonumenten, VNNI, CNV, COS Nederland, Ethical Trade Initiatives (UK, Denmark, Norway), FNV Bouw, LIW	China, India	
Natural Stone (upscaling)	2 mln	2 mln	0.5 mln	Additional donors approached								Improved living and working conditions for 20,000 workers by 2015	and waste processing	Roll-out of sustainable stone label in Western Europe	sustainable natural stone	Additional West European companies and branch organisations, DFID, DANIDA, GTZ	Brazil, China, India, Southern Africa, Turkey	
Tourism (ongoing)	0.3 mln	0.2 mln	0.2 mln	-	Unknown		18,500	€ 643 bln. In 1 of 3 developing countries, tourism is the most impor- tant export sector	€ 327 mIn tours booked, of which € 54 mIn to developing countries	€ 26.7 mln tours booked, of which € 3.2 mln to developing countries	Developing new tourism concepts in which sustainability is key (e.g. CO <sub>2</sub> -emissions, local social issues)	Implementation of social sustainability criteria at accommodations in 6 destinations	Development of a sector wide strategy for reduction and compensation of CO <sub>2</sub> -emissions	Roll-out of Travelife Certification amongst suppliers of participating tour operators. Focus on 6 destinations		ANVR, ABTA/FTO, Baobab Reizen, Corendon, ECEAT, Fox Vakanties, Kuoni, OaD Groep, Reisspecialisten Groep, Sawadee Reizen, SNP Reizen, Thika Travel, TUI Nederland, Vereniging voor Duurzaam Uitgaand Toerisme, CBI, Cordaid, IUCN, Plan Nederland, Travel Foundation Nederland, Wageningen UR	Brazil, Egypt, Kenya, Tanzania, Thailand, Turkey	
Tourism (upscaling)	1.5 mln	0.8 mln	0.5 mln	Additional donors approached	Unknown	In top 5 of European travelers to developing countries						Improved working conditions at 1,000 accomodations by 2015. Destination approach on urgent social issues	Implementation of sector wide CO <sub>2</sub> -strategy. Improved environmental conditions (water, electricity, natural habitat) at 1,000 accommodations by 2015. Destination approach on urgent environmental issues	Per destination an effective alliance of local stake- holders. Dutch and West European tour operators involved		Additional Dutch and European tour operators and European branch organisations, Civil Society Partners. In destination countries: hotel associations, tourism boards, tourism authories		
Tropical Timber Borneo	2 mln	16 mln	-	Adessium 1 mln Dutch Post- code Lottery 2.3 mln	438 mln				5 mln m³	0.6 mln m³	EU regulations are banning illegal timber. Public procurement policies are prescribing sustainable timber. Popular species are expected to become scarce soon	Protection of forests for communities which depend on the forests for their livelihood. Implementation of FSC standards which comply with ILO conven- tions and abolish child labour	Reduced CO <sub>2</sub> -emissions and preservation of biodiversity through FSC certification of an additional 10 mln ha primary tropical forest by 2013	2.7 mln ha tropical forest certified extra. Formation of producer groups. Growth of FSC certified tropical timber markets	Dutch public procurement: 100% FSC in 2010 (national) and 50% - 75% in 2010 (local). Target FSC is 33% FSC tropical timber in 2012. The EU is in the process of banning all illegal timber on the European market	Indonesia: Bealyan River Timber, Indexim Utama, Roda Mas, Sarpatim, Sarang Sapta Putera, Suka Jaya Makmur. The Netherlands: Aedes, Dekker Hout, DPW van Stolk, Doorwin Trading, FETIM, Jongeneel, Lionex, Maxeda, Mulder Hout, NEPROM, PontMeyer, Rabobank, Steffex, Woonbron. Civil Society Partners: FSC, GFTN, Indonesian Forest and Trade Network, Tropical Forest Trust, WWF	Indonesia	
Tropical Timber Amazon	6.6 mln	24 mln	4.5 mln	-		No. 3 importer in Europe	8,000	217 mln m <sup>3</sup>						4 mln ha tropical forest certified extra. Growth of FSC certified tropical timber markets		Bolivia: Bitumbo, Cimal, Comarbol, Dekma, Inpa, Mabet, Soex. Brazil: Amata, Cikel, Cooperfloresta, Orsa, PFCA, Universal Timber Madeira Lithoranea. Peru: EJ Matthei, Espinoza, Fecomazan, Green Gold Forest, Mapesac, Nematsa, Rodrígo Group, Von Humboldt. The Netherlands: BAM, Clerkcs, Dekker Hout, Inpa Parket, Jongeneel, Precious Woods Europe, Nailtra, PonttMeyer, Rabobank, Volker/Wessels. Civil Society Partners: ICCO, IFT, Imaflora, FNV Bouw/BWI, FSC, SNV, WWF	Bolivia, Brazil, Peru	
Tropical Timber Africa (upscaling)	4 mln	18 mln	4 mln	Additional donors approached										At least 3 mln ha tropical forest certified extra. Growth of FSC certified tropical timber markets		DLH, Precious Woods Europe, Rabobank, Reef, Wijma, FSC, GFTN, ICCO, IFIA, WWF	Cameroon, Congo-Brazzaville, DRC, Gabon, Ghana	
Cotton	10 mln	20 mln	10 mln	SECO, IFC, CFC 10 mln	3 bln (Textile and Clothing Industry)	-	7,000	ca. 25 mln ton	Unknown	30,000 ton	Cotton is the most used natural fibre, though is associated with excessive water use, use of pesticides, labour circumstances, and indebtedness of farmers	15% increase in income for 350,000 farmers by 2015. Abolish child labour	900,000 ha sustainable land use by 2015. Reduced use of hazardous and toxic chemicals. Reduced water consumption	1 mln ton sustainable by 2015. 1.5% of world cotton production sustainable by 2020	The Netherlands, together with Switzerland and the Scandinavian countries, are key partners for the cotton industry in addressing sustainability	Ecom, H&M, IKEA, Levi's, M&S, Rabobank, ICCO, Solidaridad, WWF	Initially India, Pakistan. Later Brazil, China, West Africa, China (as guided by BCI)	
Aquaculture	20 mln	50 mln	3 mln	GTZ and others 20 mln	3.6 bln (whole fish sector)	In top 6 in trade in Europe	19,000 (whole fish sector)	Aquaculture total 50 mln ton; Pangasius 1.1 mln ton; Shrimp 2.8 mln ton; Tilapia 2.3 mln ton	Pangasius 0.2 mln ton; Shrimp 0.4 mln ton; Tilapia 0.2 mln ton	Pangasius 30,000 ton; Shrimp 26,500 ton; Tilapia 6,000 ton	Processors/traders are responding to retailer's demands to provide their consumers with certified sustainable seafood	Increased income for 10,000 smallholders by 2015. Improved working conditions for 50,000 employees on the farms by 2015. Improved land use and water use rights of local communities	Conservation of biodiversity, fish stocks, and vulnerable, coastal ecosystems. Prevention of outbreaks of exotic species, land salinization. Certification of fish feed	15% of EU trade in Tilapia, Pangasius and Shrimps certified by 2015. 30% certification by 2020. Creation of ASC sustainability eco-label	Sustainability policy of Ministry of LNV. Realisation of Biodiversity Programme of Dutch government. Aquaculture as part of the EU Common Fisheries Policy. ASC headquartered in the Netherlands	Ahold, Anova, Aquastar, Birds Eye/Iglo, Docifish, Edeka, Findus, Heiploeg, Hiep Thanh, Kennemervisgroep/Mayonna, Metro, NACA, Rabobank, Gueens, Vinh Quan, Regal Springs, Skretting/Nutreco, SuperUnie, ASC, Deutsche Bundesverband Fisch, GLOBALGap, GTZ, LNV, IUCN, MSC, Oxfam-Novib, Productschap Vis, UNDP, VIV, World Fish Centre, WWF, WUR, local NGOs	Bangladesh, China, India, Indonesia, Thailand, Vietnam	

## **Overall Conclusions:**

- 1. The eight programs for upscaling involve over 100 organizations, of which approximately 60 companies with offices in the Netherlands
- 2. From 2009 to 2015 these companies are expected to invest approximately € 480 mln in sustainability of cocoa, tea, tropical timber, natural stone, tourism, soy, cotton and aquaculture
- 3. Considering their turnover in the Netherlands, their position on the world market and their employment generation, it is not only valuable but also essential that these companies secure the future supply of sufficient, high quality raw materials
- Cooperation between companies, NGOs and government results in stronger leverage for making the commodity chains sustainable
- 5. Support to these public-private partnerships is a tangible and significant contribution from the Dutch government to contribute to the Millennium Development Goals

## Action Plan Sustainable Trade 2011-2015: Programs in Scope



SECTOR	CONSUMER MARKET											PR	ODUCER MARI	KET	POLITICAL ARENA		FOCUS
	Investments in Sustainability (€)		Importance of Sector for the Netherlands			Relative Importance the Netherlands in World			<b>Business Drivers</b>	MDG 1: Poverty Reduction and	MDG 7: Environmental Footprint	MDG 8: Sustainable Trade	Relevance & Opportunities	Key Partners (Potential)	Countries / Regions		
	Public Private NGOs Other Donors				Direct FTEs			Import NL		Social Agenda	Pootprint						
Electronics	3 mln	2 mln	-	-	30.9 bln (whole ICT sector)	Philips, Océ (Canon) and TomTom have global headquarters in the Netherlands. Philips is in the top 10 of electronics companies worldwide	250,000 (whole ICT sector)	Global market is about 2,000 bln USD	-	_	Several raw materials used are becoming scarce. Financial benefits. Image and risk manage- ment, especially regarding working conditions	Opportunities for industry wide cooperation with large front runner companies including HP (No. 1 in sector) and Philips	Reduced use of hazardous chemicas. Reduced water pollution. Improved e-waste recycling	Opportunities for industry wide cooperation	Public procurement policies on electronic devices. Conflicts about minerals. Recycling agreement. Possible diplomatic cooperation with China and other Asian countries	Hewlett Packard, Philips, FNV, GoodElectronics, MakelTFair, Somo, others including supplying companies	Initially China
Cashew	2.75 mln	2.75 mln	-	-	ca. 1 bln	ca. 20% of import in the world	_	2.1 mln ton raw cashews (400,000 ton after proces- sing)	2.0 mln ton of edible nuts	128,000 ton of edible nuts	Securing sourcing by stimulating processing in and export from Africa. Need for an international sustainability standard	Increased income for 30,000 small farmers and processors. Improved working conditions in processing industry	Reduced CO <sub>2</sub> -emissions through development of processing industry in Africa. Reduced use of pesticides	Organisation of and market access for initially 30,000 farmers. Development of a sustainability brand	The port of Rotterdam is the main trading centre of Europe for edible nuts	African Cashew Alliance, Ahold, Global Trading, Intersnack, Bill & Melinda Gates Foundation, FairMatch Support, GTZ	Initially Benin, Burkina Faso, Ghana, Mozambique. Later all producing countries (incl. Asia)
Herbs & Spices	2 mln	2 mln	-	-	ca. 41,000 ton	No. 3 importer in Europe; No. 2 exporter in Europe	-	ca. € 4 bln	ca. € 1.2 bln	ca. € 100 mln	Repositioning herbs and spices as natural and sustainable	Improved socio-economic position of smallholders in 2 to 4 countries	Improved environmental performance of production in 2 to 4 countries	Development and implementation of a sector wide sustainability standard. International coalition of frontrunners covering 10 - 15% market share	Sustainability of agribusiness, foodsecurity and biodiversity	Members of NVS including Euroma, Intertaste and Verstegen, ESA, KIT	China, India, Madagascar, Vietnam
Fruit	4.5 mln	10 mln	4.5 mln	-	2.1 bln	No. 2 importer in fruit juice and mangos in the world; No. 3 importer in pineapples and citrus in the world; No. 13 importer in bananas in the world	19,000	Pineapples 20 mln ton; Citrus 125 mln ton; Bananas 90 mln ton	Pineapples 1.4 mln ton; Citrus 6.6 mln ton; Bananas 7.4 mln ton	Pineapples 0.2 mln ton; Citrus 1 mln ton; Bananas 0.2 mln ton	Ensuring supply in the long term. Maintain a high level of food safety and food quality. Retailers are looking for sustainable	Improved working conditions and increased income for workers	Reduced CO <sub>2</sub> -emissions. Reduced waste. Reduced use of chemicals. Reduced consumption of water and	Alignment of retail (consumer) labels for fruit and vegetables. Development of international coalitions	Expansion of the horticulture partnerships towards other subsectors and regions	Ahold, CBL, Coop Norden, Coop UK, Frugi Venta, Plus, Productschap Tuinbouw, Tesco, ICCO, Solidaridad	Africa, Latin America (pineapple in West Africa; citrus in Southern Africa; bananas in Latin America)
Vegetables				-		No. 3 importer in avocados and beans in the world; No. 7 importer in asparagues in the world		Avocado 3.5 mln ton; Beans 6.8 mln ton; Asparagus 7 mln ton	Avocado 0.3 mln ton; Beans 5.4 mln ton; Asparagus 1 mln ton	Avocado 50,000 ton; Beans 58,000 ton; Asparagus 19,000 ton	products to increase their brand value		water pollution	to implement sustainability in different subsectors	and regions	Ahold, CBL, Coop Norden, Coop UK, Frugi Venta, Plus, Productschap Tuinbouw, Tesco, ICCO, Solidaridad	Africa, Latin America
Palm Oil	10 mln	15 - 20 mln	12.5 mln	POPSI (Soli- daridad), LNV	-	No. 1 importer in Europe; No. 3 user in Europe	-	43 - 48 mln ton (Indonesia, Malaysia, 85%)	3.8 mln ton	€ 1.2 bln	The palm oil industry is organized in the RSPO to address sustainability. In the implementation phase smallholder and chain of custody issues are vital	Strengthened position of small producers and plantation workers. Improved land use rights of local communities	Protection of peat areas and conservation of biodiversity. Improved sustainable land use	Strengthening producer organisations. Implemen- tation of RSPO standards globally. Chain-of-custody certified	Diplomatic cooperation with China to base their imports on the RSPO standard	Cargill, Cefetra, CSM, Essent, Nutreco, Rabobank, Unilever, Oxfam Novib, Solidaridad, WWF	Brazil, Colombia, Ecuador, South East Asia, West Africa
Fisheries	1.9 mln	2.8 mln	5.8 mln	-	3.6 bln (whole fish sector)	In top 12 in trade in the world	19,000 (whole fish sector)	Total 95 mln ton; Tuna 6.5 mln ton; Shrimp 3.2 mln ton; Fishmeal 5.46 mln ton	Tuna 832,000 ton; Shrimp 436,000 ton; Fishmeal 1.0 mln ton	Tuna 42,700 ton; Shrimp 31,000 ton; Fishmeal 26,300 ton	Retail demand for certified sustainable seafood. Fish imports need to be proven not to be illegal	Increased income and affordable protein for local workers	Conservation of biodiversity, fish stocks, and vulnerable ecosystems	MSC certified and trans- parent supply chains (fisheries in India, Indonesia, Mozambique, Phillipines, Suriname, Vietnam and reduction fisheries in Peru)	Realisation of Biodiversity Programme of Dutch government. EU Common Fisheries Policy	Anova, Ibromar, Guyana Seafood, Heijploeg, Mavimbi Ltd., Morubel, Ocean Fresh, Socksargen, ADB, Walton Family Foundation, IUCN, MSC, WWF	India, Indonesia, Mozambique, Peru, Philippines, Suriname, Vietnam
Flowers & Plants	4.5 mln	10 mln	4.5 mln	-	4.9 bln	No. 1 in trade in the world	16,000	€ 24 bln	€ 13 bin	€ 1.2 bln	Maintaining market position by delivering a high level of quality. Improved consumer awareness	Improved agricultural	Reduced use of chemicals. More efficient water consumption and reduced water pollution. Mitigation of negative impacts on biodiversity	Alignment of retail (consumer) labels for flowers and plants. Increased market access for small holders. Organisation of a Round Table promoting open dialogue	Expansion of horticulture partnerships towards relevant regions	Ciccolella, Dutch Flower Group, FloraHolland, Hilverda de Boer, Kenya Flower Council, Productschap Tuinbouw, Royal Lemkes Group, Both Ends, FFE, FFP, International Labor Rights Forum, Kenyan Ministry of Agriculture, KHRC, Ministry LNV, MPS, OLAA, Solidale	Africa, Latin America
Shoes & Sporting Goods	2.1 mln	2.1 mln	-	-	1500 retailers and 250 suppliers	Nike, Reebok and Asics have their European headquarters in the Netherlands	-	USD 284 bln	-	-	Sub-contractors and manufacturers operating with social and environmental concerns are perceived by the brands as more reliable. Opportunity for economic gain. Consumers are increasingly demanding sustainable products	Improved labour rights and working conditions, particularly in South Africa and Asia. Abolish child labour	Reduced CO <sub>2</sub> -emissions. Reduced local chemical waste	Development of a sector wide carbon governance program. Taking concrete steps in social and environmental issues	Diplomatic cooperation in China and other Asian countries on sustainability policy	World Federation of Sporting Goods Industry (incl. Adidas, Asics, Nike), local trade unions, ILO, WWF	South Africa, South East Asia
Sugar	3 mln	3 mln	0.5 mln	SUPSI (Soli- daridad)	> 1 bln	No. 1 importer of sugarcane ethanol in Europe (used for transport fuel, Chemical Industry and Food & Beverages)	3,000	Sugar > € 20 bln; Ethanol > € 30 bln	Sugar > € 800 mln; Ethanol > € 1.7 bln	Sugar > € 20 mln; Ethanol > € 840 mln	Changes in EU regime will cause increased imports of raw cane sugar. Mandatory biofuel blending. Develop- ment of biobased economy	Increased productivity of small farmers and improved working conditions for cane cutters	Reduced water consumption. Reduced CO2-emissions and air pollution. Controlled expansion in order to save areas of high biodiversity	Certification and producer support through the inter- national multi-stakeholder roundtable, Better Sugarcane Initiative (BSI)	Dutch government promotes biobased economy. This requires sustainable supply chains for legitimacy	Akzo Nobel, DSM, North Sea Group, Rabobank, Shell, Suikerunie, Unilever, VNCI, WWF, Solidaridad	Net exporting countries in Southern and Eastern Africa, Central America, the Caribbean and Brazil
Beef	2 mln	2 mln	0.5 mln		700 mln (pro- duction value beef sector)	No. 2 in beef trade in Europe	12,700 (in slaugh- terhouses & meat proces- sing)	58.5 mln ton	478,000 ton (expected increase of 50% until 2015)	361,000 ton beef	EU imports of beef are expected to increase by 60% until 2015. Retailers want a label for high quality sustainable beef. Serious public concern on a range of sustainability issues resulting in high reputational risks	Increased income for small farmers especially in Southern Africa. Improved working conditions especially in Latin America	Reduced GHG-emissions and water consumption. Reduction in deforestation	Development of sustain- ability standard for European/international market (making use of Beef Round Table in Brazil). Market introduction of a high quality sustainable beef label	Beef is a crucial commodity to various government policies such as biodiver- sity, climate change, deforestation and protein transition	Retailers, Dutch leading importers, leading exporters in Africa and Latin America, Rabobank, Solidaridad, WWF, local NGOs	Argentina, Brazil, Botswana, Namibia, Paraguay, Uruguay