



THIS REPORT WAS
MADE POSSIBLE WITH
THE SUPPORT OF



WWF NEDBANK
**GREEN
TRUST**



REPORT

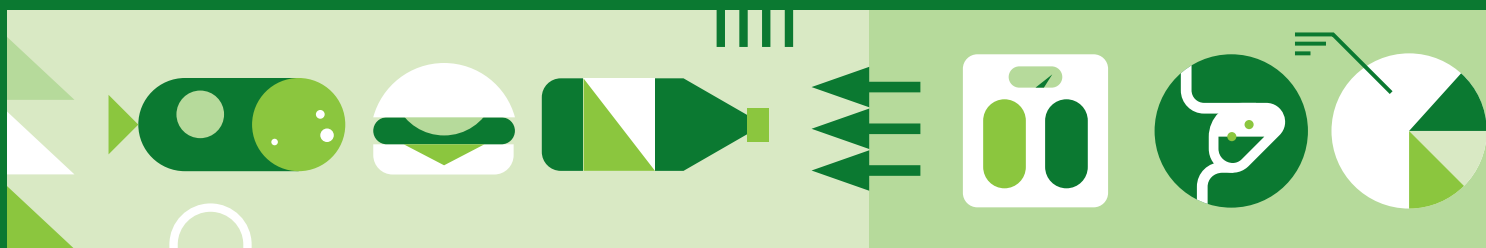
ZA

2018



AN APPETITE FOR COLLABORATION

**Addressing food-related health challenges
through collective industry action**



Authors: Jonathon Hanks, Jacqui Dixon and Treve Jenkin

Editors: Tatjana von Bormann and Scott Drimie

Copy editor: Carolyn Cramer

Cover and report illustrations: Brad Cuzen

Design and layout: Sue S | Design

Printer: RSA Litho

Printed on: Cocoon Offset

Published in October 2018 by WWF – World Wide Fund for Nature (formerly World Wildlife Fund), Cape Town, South Africa. Any reproduction in full or in part must mention the title and credit WWF as the copyright owner.

© Text 2018 WWF-SA

All rights reserved

WWF is one of the world's largest and most experienced independent conservation organisations with over 6 million supporters and a global network active in more than 100 countries.

WWF's mission is to stop the degradation of the planet's natural environment and to build a future in which humans live in harmony with nature, by conserving the world's biological diversity, ensuring that the use of renewable natural resources is sustainable, and promoting the reduction of pollution and wasteful consumption. wwf.org.za

CONTENTS

INTRODUCTION	3
THE RESEARCH PROCESS	4
SOUTH AFRICA'S HEALTH CHALLENGE	5
FOOD-RELATED HEALTH CHALLENGES	6
THE DRIVERS OF CONSUMERS' FOOD CHOICES	7
THE ROLES AND RESPONSIBILITIES OF KEY PLAYERS	8 - 9
OPPORTUNITIES FOR INDUSTRY COLLABORATION	10 - 11
CHALLENGES FOR COLLABORATION	12
RECOMMENDATIONS	13 - 17
TAKING IT FORWARD	18
ACKNOWLEDGEMENTS	19
REFERENCES	20





INTRODUCTION

South Africa has a serious health problem. Lifestyle diseases are among the top causes of death.

Non-communicable diseases like heart disease, stroke and some cancers are responsible for around 40% of deaths.

The prevalence of overweight and obesity is close on 58% for men and 71% for women. Resultant health risks are most pronounced for women, children and those with low incomes, reflecting and reinforcing historic socio-economic disparities.

As South Africa experiences rapid urbanization, a youth bulge and population growth – all of which are seen as positive opportunities for economic and private sector growth – these changes drive a diet transition whereby more and more people tend to favour low-nutrient, high-calorific convenience foods exacerbating the triple burden of malnutrition. The very drivers of economic opportunity are therefore contributing to a genuine and growing threat to the region's health and ultimately coming at a very real economic cost.

The growing health impacts of this diet transition, converging on a resource intensive Western style diet, compounded by associated environmental challenges across the food value chain, are stressing an already over-burdened public healthcare system, reducing population health and well-being, and posing a material risk for business and the economy.

More effective government policy and regulatory intervention are critical to addressing some of the systemic issues driving food choices. But in the absence of an enabling policy environment, it is incumbent upon those involved in the food sector to consider the potential role of collaborative industry initiatives as a means of addressing nutrition-related health challenges. This publication presents key findings and recommendations of research undertaken on behalf of WWF South Africa and the Southern Africa Food Lab to determine what such collaboration could look like.

THE TRIPLE BURDEN: AFRICA'S UNIQUE STRUGGLE

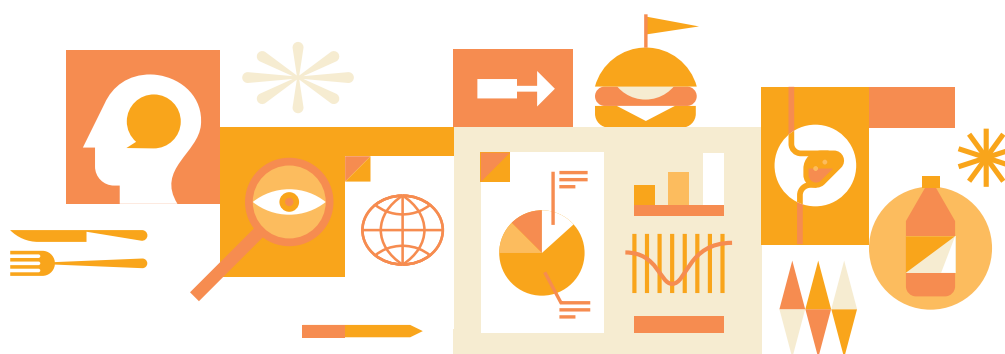
The triple burden of malnutrition is the seemingly contradictory coexistence of under-nutrition (which results in stunting and wasting), over-nutrition (which results in overweight and obesity) and micro-nutrient deficiencies (which exacerbate the other two). These issues are less a result of food quantity, or consumption than they are of food choices, or nutrition.

FOOD AND THE ENVIRONMENT

There are numerous feedback loops between what we eat and how we grow that food. Increasingly we are growing food for animals or as base ingredients for highly processed foods and even for fuel for cars and planes. As the production of food is fundamentally linked to natural resources, any changes in consumption demand result in concurrent changes in the embedded water and energy in the final food product. A continuation of the recent trends of expansion and intensification will undermine the very resource base on which the food system depends. Negative health and environmental outcomes cannot be addressed in isolation; agricultural policy should be linked to health policy.

THE RESEARCH PROCESS

A desktop review and an engagement process were undertaken to assess the feasibility and nature of potential collaborative initiatives within the South African food and retail sector. The end purpose is to address some of the health challenges associated specifically with unhealthy diets and food insecurity.



STAGE ONE	STAGE TWO
Desktop Review	Interviews
<p>A comprehensive global review of recent relevant industry interventions suggests that industry collaborations on health and nutrition have increased in recent years, driven in part by greater regulatory and civil society pressure. Most initiatives:</p> <ul style="list-style-type: none"> • tend to be in those areas where regulatory risk is greatest • where collaboration requirements are lowest • focus on promotional activities that encourage consumers to make healthier choices while maintaining a free choice retail environment • are biased towards industry preservation over transformation • may be developed specifically to divert attention away from more transformative policy measures. 	<p>Following the desktop review, an engagement process was undertaken to assess the appetite, feasibility and possible nature of collaborative initiatives within the South African food sector. Forty-six semi-structured interviews were conducted between February and June 2018 with representatives from:</p> <ul style="list-style-type: none"> • local and international sector bodies • food manufacturers and retailers • provincial government • academia • consultants • and NGOs <p>The process provided useful perspectives and insights on the South African food system, and on the potential for and nature of collaborative industry initiatives. It also resulted in the connecting of various organisations and the sharing of resources.</p>

SOUTH AFRICA'S HEALTH CHALLENGE

The persistence of hunger and malnutrition in South Africa relates to a range of complex and interrelated issues spanning environmental, health, economic, socio-political and management domains. Ensuring that a growing population has access to a healthy, affordable, and environmentally sustainable diet will undoubtedly remain one of the greatest challenges facing the region.

There are key trends and challenges that need to be addressed, some of which include the following:



The burden of increasing obesity, non-communicable diseases and persistent malnutrition

Obesity and diet-related non-communicable diseases are increasingly prevalent across most of the population, while hunger, nutrient deficiencies and stunting persist at alarming levels. Risks are more pronounced for women, children and those with low or no income, reinforcing historic socio-economic disparities. These health risks are further associated with intensifying patterns of environmental decline and social volatility that together hold potentially material consequences for national productivity and economic performance.



The challenge of changing dietary patterns

Unhealthy dietary patterns directly contribute to poor public health and high NCD risk. Generally, South Africans under-consume whole natural foods, fruits and vegetables, and over-consume refined grains, meats and meat-products, sugar-sweetened food and drink, and convenient fast foods. There is a tendency to over-consume in general, with high intake of saturated fats, sugars and sodium of particular concern. Many with low incomes struggle to access and afford appropriate food and adequate nutrition. A significant change in South African diets and nutrition is crucial to improve health, productivity and wellbeing. This will be the most cost-effective strategy to address this health challenge.



The industrial food sector and the increasing availability and affordability of unhealthy food

The South African food environment is strongly shaped by the practices of large industrial food companies in the food, beverage and retail sector. Such companies wield significant power and their strategies – to aggressively market their products, expand their market share, and drive supply-side efficiencies to maximise profits – have resulted in strongly concentrated and highly industrialised food value-chains. This has driven high availability, acceptability and affordability of predominantly unhealthy, processed-packaged foods. This overwhelming abundance of unhealthy foods and the deep cultural acceptance of and aspiration towards these foods presents a unique challenge and opportunity to improve health in the food system through collaborative engagement with the food industry.



The nutritional implications of a decline in small, informal, rural and local food networks

The industrialisation and concentration of agricultural and food retail value-chains in South Africa has led to a decline in small players and local food networks. This has had a further negative impact on health and nutrition, as these informal systems tend to have shorter value-chains, improve access and affordability to a greater diversity of healthier whole-natural foods, and reduce vulnerability to international price fluctuations. These smaller players and networks currently lend an unaccounted-for resilience to the South African food system, nutritionally, economically and socially.



The challenge of the food-health-environment nexus

The power and practices of the food industry together with the nature of agricultural and retail food value chains have important environmental implications that often exacerbate poor nutrition and health. In South Africa, these impacts are significant and growing and are strongly shaped by pressures from retailers in meeting (and shaping) demand for mainly unhealthy food products. Through its impacts on the soil, and through increased chemical contamination from pesticides in crop farming and antibiotics in concentrated animal production, industrial agricultural practices are further compromising food safety and resulting in food that is of lower nutritional value than food produced through ecological farming methods.

FOOD RELATED HEALTH CHALLENGES

"The NDP explicitly emphasises social dialogue as the way to drive change in the country through renewed engagement and commitment between the private sector, organised labour, civil society, and the state. This reflects a recognition, at least within the NDP, that addressing food insecurity cannot be the sole responsibility of the state."
(Food consultant)

"I think business doesn't yet sufficiently appreciate the extent of this challenge. But this is beginning to change."
(Food consultant)

"I'm very sceptical that business will do the right thing. In a capitalist economy, competition is cut throat, not just within sectors, but also across sectors. If you don't make a profit you just disappear... The only answer is regulation. The state has to lay down the guidelines and enforce them." (Academic)

Policy levers are important as there will always be limitations to what food manufacturers can do.
(Government)

"There is absolutely a need for collaborative initiatives. This is a huge challenge facing us and will cost us a fortune as a country if it's not addressed. We have to find a way to find a larger, scalable impact." (Food retailer)

"Nutrition is always seen as someone else's problem. If the consumer is not demanding it and government is not requiring it, why would companies respond?" (Academic)

The struggle is that we have an affordability challenge and people end up buying cheaper highly processed foods.
(Food retailer)

"When we discuss how we address this big issue around accessibility of food, there has to be a fundamental rethinking by all parties. The fundamental change has to be specifically around the economic value chain, an area that people are uncomfortable addressing."
(NGO / researcher)

"Obesity and diabetes will have a similar impact on the workforce as HIV in the past."
(Food manufacturer)

The costs to the Western Cape Province from child stunting and obesity have been estimated at R1 trillion: R360 billion from stunting and R640 billion from obesity. That's 5% of GDP per year.
(Government)

THE DRIVERS OF CONSUMERS' FOOD CHOICES

Appreciating the drivers behind consumers' food decisions is seen as critical in designing effective policy responses. Various views were shared on this issue, with useful implications for informing potential collaborative interventions. Some spoke of the role of affordability, availability, time, culture and habits, while others cautioned that increased awareness alone does not always lead to behaviour change.



“Why are people not consuming their 5-a-Day? People know what they should be eating. It’s a function of finance, time and availability. I’m not always convinced there is a knowledge gap. It can be culture and cooking habits.” (Academic)

“We have to find the right means to change consumer behaviour. In South Africa we did some very good research and we found that it’s all about affordability and availability; but the researchers also looked at what South Africans like, and it seems that they don’t generally like fruit and vegetables.” (Food consultant)

“To understand what drives current diets and what might facilitate change, we need to appreciate how some traditional cultures used to eat – typically high-carb samp and beans, and lots of pap. There has been some interesting work done by the Noakes Foundation in Ocean View, seeking to shift diets from pap to Heba.” (Food retailer)

“People only buy healthy food if it’s packaged with stuff that people want. Changing consumer behaviour is the hardest possible thing to do. You can tell me to eat well, but I’ll still eat rubbish. People are creatures of habit.” (NGO / researcher)

“People have been buying the ‘township burger’ or ‘kota’ – two slices of bread, stuffed with fried chips, achar and polony – for many years; it is habitual. If there is something else that is healthier and it becomes fashionable, they will buy it.” (Food consultant)

“Built into our biology is a long history of being chronically deprived of energy foods. High fats and high sugar products are just delicious to us. If you combine this with high levels of consumption, it’s a heady mix. This is the problem with traffic lights and ‘5-a-Day’: they actually go against what’s embodied in us and in our aspirations. Advertising is latching onto these things, but not causing it.” (Academic)

“Changing behaviour on this issue is complicated and is wrapped up in bliss points. And that’s difficult to change.” (Academic)

“In our recent research on nutrition, the customers’ main concern is to keep their tummy full and there is a huge aspiration for western food, which is probably the most unhealthy food. It is very difficult for us to do this alone, without others to support us.” (Food manufacturer)

THE ROLES AND RESPONSIBILITIES OF KEY PLAYERS

There were diverging perspectives on the nature of the roles and responsibilities of key players in the food system. This divergence was particularly apparent among some of the food producers and retailers who differed on the level of responsibility they believe should be shouldered by business. This has obvious implications in terms of identifying those industry players that will be most receptive to contributing to a more progressive collaborative initiative.

It highlights the importance of understanding how each company is framing its value proposition over the longer term, and of identifying those specific issues that are most material to its business model and that are within its sphere-of-influence.

Although many emphasised the important role of consumers in shaping the corporate response, several suggested that consumer groups were not sufficiently organised in South Africa, and that the linkage between nutrition and health was not widespread. The role of consumer education and driving aspiration was considered key to changing dietary patterns. Concerns were expressed about the quality of business and NGO engagement in the health space primarily due to the high levels of mistrust between the parties.

THE ROLE OF
CONSUMER EDUCATION
AND DRIVING
ASPIRATION WAS
CONSIDERED KEY
TO CHANGING DIETARY
PATTERNS.



DESPITE
WIDESPREAD
CONCERN WITH
BUSINESS
INCENTIVES,
THERE IS SEEN TO
BE SIGNIFICANT
MERIT IN
PURSUING
INDUSTRY
COLLABORATION

OTHERS
SUGGESTED THAT
THE PRIMARY
RESPONSIBILITY
FOR THIS ISSUE
LIES ELSEWHERE

"We need to fundamentally change the system... one way is through collaboration between players." (Food manufacturer)

"I think it's extremely important to collaborate and work with companies. We might have different interests, but at the end of the day we are working towards the same goal. There is no point in us fighting 'Big Food' – by working with them we can achieve our objectives." (NGO)

"We need to recognise the power of the corporate sector: they have economies of scale and the ability to shape consumer food preferences and consumer behaviour." (Food consultant)

"In trying to understand how to change the food sector, we have to be clear that we have to work with the private sector. It's ultimately in their long-term interests to deliver healthier foods, a healthier environment and healthier jobs." (Academic)

"There are much better chances for real scale change when parties come together in a precompetitive manner, in the context of a multi stakeholder environment." (Food retailer)

"Big business is not the reason why people make poor food choices; it's because people are uneducated and have little money, and as a result have limited choice. We can be a part of the solution, but only so far. We sell biscuits. Having a biscuit with a cup of tea is not a bad thing; having a cup of tea is not a bad thing – but filling that with sugar is a bad thing. This is all about education – and education is the role of government." (Food manufacturer)

"Coke spends a huge amount of money on communities, brings a lot of joy...there are a lot of things that are good about it. My teenage children know that sugar is bad for them. So do you target the brand because they make it easy to have what is not good for you? Or do you target the person drinking it? Where do you begin and end? Should we [as industry] play God?" (Food manufacturer)

THE ROLES OF
OTHER KEY
PLAYERS

There was widespread agreement on the key enabling role that Government can play

"As salt and sugar legislation globally has shown, a single actor making a decisive change can deliver change. This is a domain where state legislation can potentially influence behaviour change through retailers. The quality of legislation is important. The indirect impact (the threat of legislation) could be equally strong. My guess is that those companies that are thinking about this might be doing this at least in part because they realise the potential impacts." (Academic)

"The nutrition issue is bubbling but not yet boiling. We have the appetite to address this. Nutrition is one of the biggest challenges facing this country, and one of the biggest potential business opportunities; we can come up with some of the most nutritious products – if possible I would love to do that. But we would still need help from government for this." (Food manufacturer)

Civil society and NGOs may potentially play an important supportive role

"Where possible we try to partner with NGOs. It's more effective, and sticks more, if we find business relevance. The most successful initiatives have been where we have worked together from the start." (Food manufacturer)

Although some believe there are low levels of trust between business and NGOs on health-related issues.

"We have seen constructive NGO engagement more in the environmental space, and less so in the health space. They [NGOs] are very reluctant to engage with us in industry; there is still a huge amount of mistrust. It is changing, but slowly." (Global industry body)

THE OPPORTUNITIES FOR INDUSTRY COLLABORATION

Valuable insights were shared on the opportunities and challenges associated with existing and potential collaborative initiatives. Specific suggested initiatives included:

Increasing consumer awareness of and accessibility to healthier eating options through:

- Collaboration on awareness-raising and education initiatives
- Creating an enabling environment for good nutrition across different consumer touch points
- Encouraging the uptake of appropriate food labelling initiatives

Collaborative initiatives to drive affordability and accessibility of healthier food through:

- Product reformulation and the development of specific product lines
- Promoting local sourcing and supporting smallholder agriculture
- Exploring opportunities with fresh produce markets
- Realising opportunities associated with food waste
- Specific collaborative initiatives aimed at reducing costs



Driving consumer aspiration for healthier foods through:

- Positive marketing opportunities of healthier products, and restricting marketing of unhealthy foods

Fostering greater accountability in the food sector

- Acknowledging the food industry, as a driver of dietary changes, has an impact on both human health and the environment



Increasing consumer **AWARENESS** of and accessibility to healthier eating options

“Nutrition education is really where we need to start.” (Food retailer)

“You can’t simply flood the market with healthy foods; you need the education too.” (Academic)

“Most of the people I know are astonishingly ignorant about what is in food – for example the sugar content.” (Consultant / researcher)

“Direct communications is one thing, but creating an enabling environment is my favoured approach. We need to look at how people interact with their food environment – whether at home, at school, in the shop, or on the street. There is an opportunity to have a healthier food environment. We need to scrutinise all the touch points and try to make them more congruent with healthy options.” (Food manufacturer)

“The bottom line is that without a specific communication programme – that is trying to get people to consume less of sugary foods and pursue a balanced lifestyle – I don’t think these initiatives will have an impact.” (Academic)

Collaborative initiatives to drive **AFFORDABILITY** and **ACCESSIBILITY** of healthier food

“It has been a major challenge for all companies to offer nutritional products in an affordable way. How do you challenge the addictive habits of cheap fast foods? Making healthy foods affordable is vital – you will not get daily consumption if it’s punitive in price.” (Food manufacturer)

“Some retailers are making an impact by making fresh produce available at a subsidised price, but what would make a real difference to people, is ready-made meals at a subsidised price.” (Consultant / researcher)

“We need to embed nutrition into product development to ensure that the product by design is healthier for the consumer. It’s never been done at the beginning stages; it’s always happening at the later stages.” (Food manufacturer)

Driving consumer **ASPIRATION** for healthier foods

“There is a strong need to focus on the aspirational aspects – we need to make healthy eating far more aspirational, as it is in Europe.” (Food manufacturer)

“Drinking Coca-Cola in the morning before school – it’s a signal that “we can afford it”. It’s that aspirational desire that capitalism and industry is working on. It separates us from those who can’t afford eating these foodstuffs.” (Academic)

“The big food trade companies are starting to invest in plant-based diet trends; they are seeing the shift in the market and are already investing in that.” (NGO)

“Billboards are a municipal competence – this is where the city can say no alcohol, no fast foods.” (Academic)

“There is a whole lot of opportunity around kids. We are doing so little here; we are still lagging behind on cartoon characters on sugary cereals.” (Academic)

Fostering greater **ACCOUNTABILITY** in the food sector

“One of the things you could do with this research is to make the case for nutrition to be a topic in transparency and disclosure, including in annual reports.” (Academic)

CHALLENGES FOR COLLABORATION

In addition to sharing their views on existing and potential opportunities for collaborative action, interviewees also provided valuable insights on the key barriers and enablers for collaborative initiatives, as well as on the potential institutional mechanisms for managing such initiatives.

KEY CHALLENGES INCLUDE

- Overcoming the highly competitive nature of the South African food producer and retail industry
- Addressing concerns with collusion
- Overcoming polarisation between groups
- Dealing with different levels of ambition amongst the parties to the collaboration
- Managing conflicting business imperatives
- Securing sufficient and sustainable source of funding, particularly in the context of existing entrenched incentives
- Having an agreed common understanding of a 'healthy diet'

ENABLERS FOR COLLABORATION

The following broad set of critical enablers was identified to inform effective collaborative initiatives:

- Setting challenging outcomes-driven targets, and ensuring appropriate accountability mechanisms
- Backing this up with sufficient funding, sound science and good communications
- Agreeing on the principles of engagement and setting clear ground rules

BROADENING COLLABORATION TO INCLUDE OTHER PARTIES

In pursuing collaborative initiatives, the value of engaging with other players was emphasised. The following proposed additional parties for potential engagement were identified:

- The financial sector
- The broader health sector
- Advertising and marketing agencies
- Quick Service Restaurants
- The ICT sector and 'big data'
- Disruptive entrepreneurs

RECOMMENDATIONS

The findings of the engagement process suggest that there is sufficient appetite to develop collaborative initiatives.



Under the right conditions these could contribute to addressing current health challenges. Informed by the desktop research and the engagement process, the following considerations have resulted in the identification of some specific guidelines:

- Efforts should focus on those initiatives where there is greatest potential to have a substantive impact on those most affected by the nutritional deficit, namely women and children in low income communities.
- Initial engagement should be with a priority set of organisations and individuals that have demonstrated their receptiveness to proactive, potentially high-impact collaboration.
- Any proposed collaborative approaches should build on the successes and failures of recent global and local initiatives, addressing some of the inherent challenges and providing for a set of identified critical enablers and appropriate institutional arrangements.
- The various initiatives should seek to provide for relevant actors and intervention areas across the food value chain, including farming, food manufacturing, food retail, consumers and waste.

Informed by the outcomes of the engagement process and desktop study, and by the considerations listed earlier, four opportunity spaces are proposed for potential industry collaboration:

01	Providing a healthy retail environment
02	Establishing a collaborative innovation group for food manufacturers
03	Engaging smallholder farmers and fresh produce markets
04	Identifying opportunities for collaborative social marketing

OPPORTUNITY SPACE 1:

PROVIDING A HEALTHY RETAIL ENVIRONMENT

Large food retailers can be seen as the power hotspot in the food system, providing a critical interface between farmers, food manufacturers and consumers, and having the ability to shape behaviour across the value chain. This is especially the case in South Africa, which has a highly concentrated food retail sector. The research process suggests that this is a high opportunity space, with several willing partners.

This opportunity space describes a potential collaborative initiative involving retailers, manufacturers, local government, and an independent external body (such as an academic institution) to encourage increased consumer uptake of healthier baskets. The initiative involves collaboration, data sharing and independent evaluation to inform things such as product and service offerings, in-store activations, online reward programmes, and in-the-community or in-the-workplace activities (like canteens in companies and other institutions).

“The retail sector can play an important role in the education of the consumer: in their offering they can put more importance on healthy food, and they can contribute to broader education through advertising and the placement of products in their supermarkets – all of this has a big impact on sales.” (Research / advocacy)

“The spirit of the Consumer Goods Forum is “many-to-many”. The Collaboration for Healthier Lives initiative has to be with more than one retailer. If we were to start with one retailer in South Africa, the objective would be to get others on board. In Costa Rica we started with one retailer, now there are two; in the US there are four; in the UK we have multiple retailers.” (Consumer Goods Forum)



Health is a massive part of our corporate strategy. We have a health group, but it needs more oomph in terms of driving the broader strategy. Collaboration could assist.

(Retailer)



OPPORTUNITY SPACE 2:



ESTABLISHING A COLLABORATIVE INNOVATION GROUP FOR FOOD MANUFACTURERS



We are currently lacking a future vision for food – this would be useful, with a strong focus on collaboration. We could partner and explore and learn from each other.

(Food manufacturer)



The engagement process identified significant interest amongst some of the large food manufacturers to be involved in a collaborative process with other stakeholders (including government) to identify potential solutions for meeting a government developed dietary plan. Several corporate champions emerged from the interview process with an evident willingness to engage in identifying potential opportunities for innovation.

The opportunity space would bring together selected senior management champions and industry leaders identified through this process, as well as selected representatives from government, with a focus on building a common vision for a healthy and sustainable food system aimed at facilitating opportunities for innovation among food manufacturers. The focus areas would emerge through a process of engagement, but ultimately would be aimed at enabling creative thinking and collaboration on non-competitive ideas around affordability, availability, acceptability, aspirations and consumer awareness.

“There needs to be some sort of bigger strategy. If we really want to address obesity or malnutrition, you can’t have all these separate strategies. If you don’t have this collaborative type of strategy looking at all the different segments will we win the battle? Are we just smoke screening this or is our real goal to address this?” (Food manufacturer)

“We need to create a nutritional plan with products that are available in the market from different manufacturers and brand holders.” (Food manufacturer)

“The collaborative opportunity arises when all parties work to address the system together. We need to identify the desired outcome and then work backwards from that.” (Food retailer)

“There are exciting opportunities for innovation in the food space: vertical farming; direct to consumer; lab foods etc.” (Food manufacturer)

“This is where you need some really big thinkers who have a sustainability mindset and who can take it to market.” (Food manufacturer)

“We don’t want to build layers of bureaucracy when effectively, in the end, you only need four key decision makers.” (Food manufacturer)

“It’s the ‘group strategy’ people who should be at the table to talk about what local manufacturers can do about the burden on health in South Africa.” (Food manufacturer)

“We see opportunities for partnerships on the marketing front; the other is through distribution in Spaza shops – we have never done a healthy eating campaign at a customer level, and we haven’t educated the Spaza traders.” (Food manufacturer)

OPPORTUNITY SPACE 3:

ENGAGING SMALLHOLDER FARMERS AND FRESH PRODUCE MARKETS



Focus on fresh produce markets where there are efficient logistic systems. We should not underestimate the logistics. It presents a valuable alternative decentralised distribution network where the private sector is already present.

(PMA member)



The SPAR Rural Hubs model emerged as best practice in local sourcing, inclusion of smallholders in formal value chains and increasing affordable fresh produce in rural areas. A strong theme emerged towards the end of the research that identified the important role of fresh produce markets in serving as critical ‘aggregation platforms’ to meet the demand for affordable vegetables and fruit, particularly in rural areas and the informal economy in township communities. With several interviewees highlighting the lack of support from municipalities as a major challenge, it was argued that there is scope for the private sector to work more closely with municipalities, pointing to the model of the Johannesburg Fresh Produce market in highlighting the potential for effective public-private partnerships.

The development of smallholder agriculture, with a focus on agro-ecological practices, requires a much larger-scale collaboration of multiple stakeholders. The focus initially would be on inclusion into formal value chains, prioritizing development of alternative and (shorter) local value chains, enhanced local food reliance and affordability.

“Promoting local sourcing should be a key focus in terms of reducing costs and increasing local availability – but we recognise there are some challenges here.” (Food manufacturer)

“For a long-term solution, we cannot rely on charity: we need an economic system that empowers people. We need aggregation platforms that make it easy to collaborate; we have real value in the fresh produce markets – we should look to fix and expand these as an existing aggregator.” (PMA member)

“We need to make the right products available at the right places...fresh produce markets are seen as having a critically important role to play. A key challenge is that these are not supported by municipalities – they are not doing their job, and are often the real source of the problem.” (PMA member)

“Work with wholesalers and with the fruit and veg markets; there is a huge opportunity with the Cape Town market in Epping. This is where you can work with the informal guys – otherwise it’s pretty much a lost cause.” (NGO / researcher)



OPPORTUNITY SPACE 4:

OPPORTUNITIES FOR COLLABORATIVE SOCIAL MARKETING

Most respondents in the engagement process highlighted the importance of education and awareness-raising initiatives on nutrition and healthy eating as a critical focus area and potential non-competitive space that runs throughout the food sector. This has been tried already to some degree by some groups such as the Five-a-Day campaign, Eat Better South Africa and Western Cape on Wellness with a number of other initiatives (like Sleek Geek) using social media as a channel to raise awareness. These have generally operated in complete isolation of each other. The recent significant uptake of banting in South Africa, and the positive impact of the Discovery Vitality initiative both highlight the potential role of a charismatic campaign in shifting consumer behaviour.

“Unfortunately SA consumers are misguided on what is good and what is bad; the level of knowledge is very poor. This is not helped by the gross miscommunication in the public media.” (Food manufacturer)

“Nutrition is already so complicated. We should aim to cut through that and keep it simple, so that it applies to different body types and cultural diets too.” (Food retailer)

“There is a strong need to focus on the aspirational aspects – we need to make healthy eating far more aspirational, as it is in Europe.” (Food manufacturer)

“There is a huge role [for us to play] in marketing and education. This is our game; it is our job to change people’s behaviour; but we will want to see a return.”
(Food manufacturer)



TAKING IT FORWARD

This research has underpinned the widely varying perspectives and interests held by different sectors in the food system. The Southern Africa Food Lab is a multi-stakeholder initiative that seeks to foster long-term food security in the region.

It exists to bring together diverse, influential actors in the food system to respond to systemic challenges in creative ways and to inspire change in how we think about and act on complex social problems in the food system. These challenges make rational discourse among actors from different disciplines, sectors, and levels difficult, and can prevent them from working together effectively to find innovative ways to respond to food security challenges.






A key argument of the Food Lab has been that a lack of engagement between civil society, government, and the private sector has exacerbated a fragmented food system that is vulnerable to current and emergent risks. These risks can be mitigated by increasing engagement among sectors and by creating an effective platform for authentic communication and innovation.

The Food Lab seeks to directly influence key actors' perceptions, relationships, and actions and both the formal and informal rules shaping these actors' incentives. Through these means, the Lab is able to:

- **Convince** Encourage people to do things differently in their own lives and in their organisations;
- **Coordinate** Enable different sector participants to align their activities and resources with those of other actors;
- **Collaborate** Support actors in co-creating shared goals and novel actions to be implemented together with other actors;
- **Change rules** Inform the creation and implementation of formal rules, including government policy and private regulation, as well as informal routines.

WWF South Africa and the Food Lab have together convened a number of systems-wide initiatives over 10 years. Underpinning the methodology is the use of systems learning and iteration, taking into account the complex inter-relationships and different perspectives of everyone who has a stake in the problem and the solution.

Through these steps, the Food Lab works to produce these five kinds of results:

	01	Cross-system relationships: the result of leading actors from across the system—including some who have been locked in conflict—to work together constructively on complex shared concerns.
	02	Systemic understandings: increased understanding of the critical issues, the interconnected drivers and leverage points and potentially some success stories from the food system.
	03	Intentions that take account of the whole system: commitments, on the part of leading actors, about what they need to do in light of these ideas.
	04	Capacities for leading systemic change in and among the participating organisations.
	05	Actions intended to transform the system: initiatives undertaken by these actors to create forward movement.

ACKNOWLEDGEMENTS

This publication presents findings of research undertaken as part of a larger food system study.

This research was undertaken by Incite on behalf of WWF South Africa and the Southern Africa Food Lab and was made possible through funding by the WWF Nedbank Green Trust.

Our sincere thanks to representatives of the sector bodies, business initiatives, food manufacturers, retailers, food producers, suppliers, NGOs, government departments and academia, as well as to the researchers and consultants who shared their valuable insights.

WWF SOUTH AFRICA

WWF SA's Policy and Futures Unit undertakes enquiry into the possibility of a new economic model that advances a sustainable future. The unit convenes, investigates, demonstrates and articulates for policymakers, industry and other players the importance of lateral and long-term systemic thinking. The work of the unit is oriented towards solutions for the future of food, water, power and transport, against the backdrop of climate change, urbanization and regional dynamics. The overarching aim is to promote and support a managed and just transition to a resilient future for South Africa's people and environment.

www.wwf.org.za

WWF NEDBANK GREEN TRUST

The WWF Nedbank Green Trust, founded in 1990 by Nedbank and the World Wide Fund for Nature (WWF-SA), funds innovative projects that have the potential to contribute to solving some of South Africa's greatest societal and environmental challenges. Our slogan, 'igniting new ways for people and nature to thrive', is our key reason for existence and we have, over the years, sought new paths, points of connection and solutions to ensure that people prosper. Our passion is for people and nature to coexist in harmony for the benefit of our country and the wellbeing of all.

THE SOUTHERN AFRICA FOOD LAB

The Southern Africa Food Lab was established in 2009 to promote creative responses to the problem of hunger through multistakeholder dialogue and action. The Lab team is one of unprecedented diversity in the region, comprising stakeholders from corporate, grassroots, NGO, academic, and government sectors, all working together to transform the food system from farm to table. Over the past decade the Lab has successfully facilitated collaboration and dialogue, not just raising awareness, but effectively catalysing action to foster innovations and experimental action towards a thriving, just and sustainable food system.

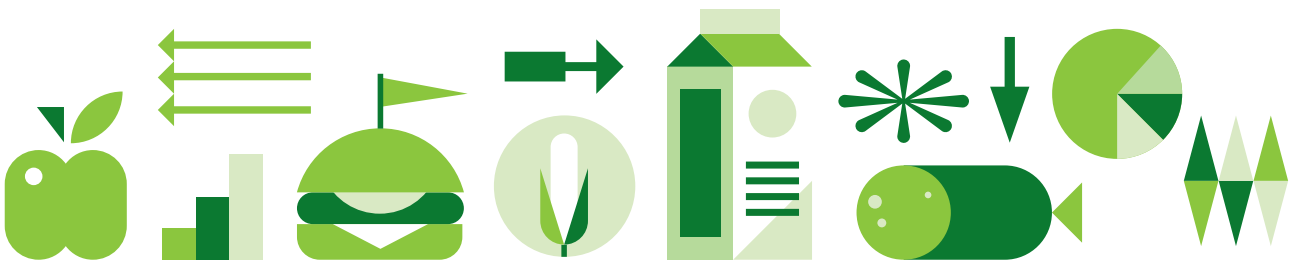
www.southernafricafoodlab.org

INCITE

Incite is an advocacy-based consultancy network based in South Africa and operating in emerging markets across the world. Incite's blend of coaching and advisory services helps organisations deliver value to society more effectively, profitably, sustainably, and at scale.

REFERENCES

- Abrahams, Z. et al.** *What's in the lunchbox? Dietary behaviour of learners from disadvantaged schools in the Western Cape, South Africa.* Public Health Nutr. 14, 1752–1758 (2011)
- Blignaut, J. N. et al.** *Sustainable Agriculture: A viable option for enhanced food and nutritional security and a sustainable productive resource base in South Africa: An investigation. Baseline Review.* (2014)
- Bureau for Food and Agricultural Policy (BFAP).** *Farm Sectoral Determination: An Analysis Of Agricultural Wages In South Africa* (2012)
- Colvin, C. A., Muruven, D., Lindley, D., Gordon, H. & Schachtschneider, K.** *Water: facts and futures - rethinking South Africa's water future.* (2016)
- Cousins, B.** *'Through a glass, darkly': Towards agrarian reform in South Africa.* 1–25 (2011)
- Eksteen, G. & Mungal-Singh, V.** *Salt intake in South Africa: a current perspective.* J. Endocrinol. Metab. Diabetes South Africa 20, 9–13 (2015)
- Faber, M., Laurie, S., Maduna, M., Magudulela, T. & Muehlhoff, E.** *Is the school food environment conducive to healthy eating in poorly resourced South African schools?* Public Health Nutr. 17, 1214–1223 (2014)
- FAO (Food and Agriculture Organisation).** *African Regional Overview of Food Security and Nutrition (2017)* <http://www.fao.org/3/a-i7967e.pdf>
- Hoddinott, J., H. Alderman, J. Behrman, L. Haddad and S. Horton.** *The economic rationale for investing in stunting reduction, Maternal and Child Nutrition*, 9 (Suppl 2): 69-82 (2013)
- Holmes, T.** *SA's ferocious fast food appetite | Business | M&G.* Mail & Guardian Business (2016) <https://mg.co.za/article/2016-04-11-sa-has-an-appetite-for-fast-food>
- Igumbor, E. U. et al.** *'Big food,' the consumer food environment, health, and the policy response in South Africa.* PLoS Med. 9, (2012)
- International Panel of Experts on Sustainable Food Systems.** *Unravelling the Food – Health Nexus: Addressing Practices, Political Economy, and Power Relations to Build Healthier Foods Systems.* (2017) http://www.ipes-food.org/images/Reports/Health_FullReport.pdf
- Joubert, L.** *The Food Dialogues Report: creating a healthier, more conscious and just food system in the mother city.* (2014)
- Kotze, I. & Rose, M.** *Farming Facts and Futures: Reconnecting South Africa's food systems to its ecosystems.* (2015). at http://awsassets.wwf.org.za/downloads/wwf006_ffl_report_low_res.pdf
- NASAC (The Network of African Science Academies).** *Opportunities and challenges for research on food and nutrition security and agriculture in Africa, Nairobi, Kenya.* (2018) <http://nasaonline.org/wp-content/uploads/2018/05/NASAC-FNSA-Opportunities-and-challenges-for-research-on-food-nutrition-security-and-agriculture-in-Africa.pdf>
- Pereira, L.** *The Future of South Africa's Food System: What is research telling us?* (2014)
- Pietermaritzburg Agency for Community Social Action.** *Media Statement: PACSA Monthly Food Price Barometer (February 2018).* (2018)
- Shisana, O. et al.** *The South African National Health and Nutrition Examination Survey 1 (SANHANES-1).* (2013)
- Statistics South Africa.** *South Africa Demographic and Health Survey: Key Indicators Report.* (2016)
- Von Bormann, T. & Gulati, M.** *The Food Energy Water Nexus: Understanding South Africa's most urgent sustainability challenge.* (2014)
- Webster, J. et al.** *South Africa's salt reduction strategy: Are we on track, and what lies ahead?* South African Med. J. 107, 20 (2016)
- Western Cape Government Department of the Premier.** *FuturesCape Policy Brief: Double Burden of Malnutrition.* (2018)
- World Health Organization.** *NCD Country Profile: South Africa.* (2014). http://data.worldbank.org/country/south-africa#cp_gep





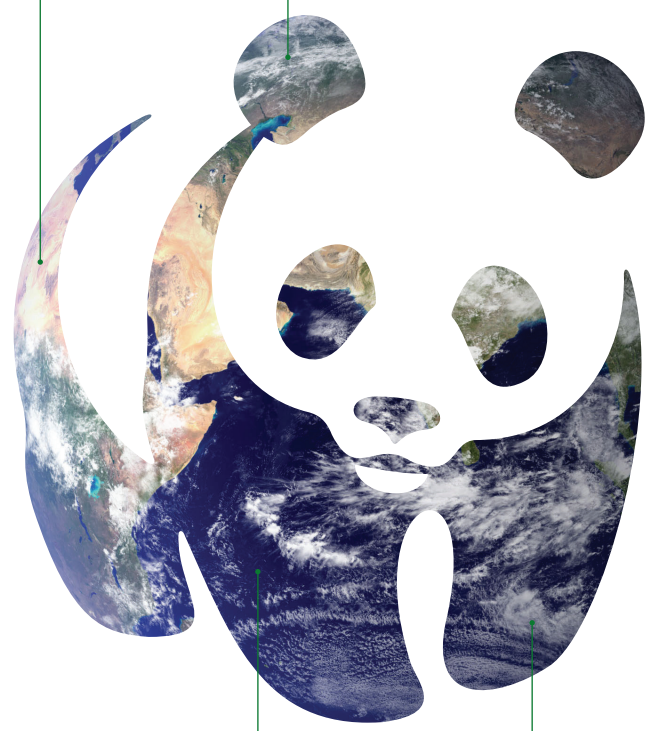
South Africa's food-related health challenge:

40%

the number of death resulting from non-communicable diseases

27%

the proportion of children younger than 5 who experience stunting



62%

the amount of water used for agriculture

R404 BILLION

the value of the informal food sector



Why we are here
To stop the degradation of the planet's natural environment and to build a future in which humans live in harmony with nature.
www.wwf.org.za