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Abstract

The last 20 years have seen growing pressure on businesses to pay attention to the environmental and resource consequences of their products and processes (Kleindorfer, Singhal and Van Wassenhove 2009). Indeed, increasing numbers of firm are implementing Sustainability in their vision and their development as a result of increasing pressure and drivers. While changing their way of working and adapting their objectives, they are trying to take advantages of those changes. The Food Industry is often criticized for its unsustainable practices but on the other hand, distributors have been working on this topic for years. As proof, the market of organic and biologic products is growing at fast speed. However, the Supply Chain environment has still place for improvement in term of sustainability. In this study, we will discuss the existing theory and the managerial implications of the Sustainable Supply Chain Management. A classification of the main drivers, benefits and barriers will be detailed. Three semi-directed interviews were conducted with experts in SC or sustainability in the food industry to gather more information's on this. The analysis of the SSCM impacts on the brand equity of a firm are discussed and turn into hypothesis. A survey evaluates the level of influence that those Sustainable business practices have as effect on the Walloon customers and if those effect can be turned into a competitive advantage. The conclusions are that SSCM can influence customers in their willingness to pay for sustainable products and it can be turn into a competitive advantage if associated with other success factors and that SSCM can enhance the talent acquisition and management and to this extent, improve innovation which can lead to a competitive advantage.

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INTRODUCTION

Feeding the planet is one of the most crucial challenges that we are facing in the last decades. In 2017, over 821 000 000 people were undernourished. (UN, 2019) additionally the global population is growing making the requirement of more sustainable food systems of topmost importance. Ensuring sustainable human development means being able to feed a planet with increasing population, decoupling the socio-economic development from environmental impact, and addressing the evolving food and energy demand (UN, 2015). Food industry is growing, and more researcher are paying attention to environmental impact of food production industry and associated suppliers. (Roy, Nei, Orikasa, Xu, Okadome, Nakamura & Shiina, 2009) Right now, our soils, freshwater, oceans, forests and biodiversity are being rapidly degraded by the way we produce and consume food. (UN, 2019) This industry being complex with flows all over the globe, the scientists are measuring the impact of the food production industry using an integrated approach. The main method to measure it are: the LCA analysis and the carbon foot print. (Tarabella & Burchi, 2012; Amienyo, 2012; Roy et al., 2009). As an example, approximately 88 Million tonnes (Mt) of food is wasted in the European Union each year and the environmental impacts of these losses throughout the food supply chain are well known. (Scherhauer, Moates, Hartikainen, Waldron and Obersteiner, 2018)

However, the supply chain impact of this industry is not the only issue in this context. Goossens et al. (2016) argued that current systems fail at enabling consumers to make adequate decisions in term of sustainability. The way people consume also needs to be reconsidered. Anthropologist Willett Kempton (2001) has suggested that from an environmental perspective, a problem with consumption to display social status is that status is always relative, generating an unending negative spiral of increasing consumption. Even if public interest in sustainability continues to rise and consumer attitudes are mainly positive, the concrete action related to sustainability are not always consistent with the attitude. A study was recently undertaken to explore this consumer attitude–behavior gap among Belgian consumers (Vermeir & Verbeke 2006). Involvement with sustainability was found to be directly associated with positive attitude and intention to buy sustainable food products (Vermeir & Verbeke 2006).

In the last decade, we have observed progress in term of sustainability in the food sector. Western consumers are getting more aware of the environmental and societal problems are caused by the food consumption. Many drivers are pushing the food industry to evolve to a

more responsible way of production and consumption. (Meixell and Luoma, 2015)

The choice of the subject for this master thesis has been guided by the characteristics of this market. The consuming and producing of food has multiple externalities that the companies and the customers tends to not consider. SSCM can help to improve the sustainable performance and reduce the negative impacts that it has on its environment. We target the B2C dimension of the food retailing, but we don't limit our research to a specific scale of company. Therefore, we know that the willingness of the final consumer to buy a product will guide the market. Indeed, this study discusses the practices of large distributors and local food shop. Besides all the potential benefits that the SSCM addresses, we will analyze if the company can obtain a real CA from this strategy. The consumer opinion will therefore be key to analyze if there is a possible competitive advantage in the implementation of SSCM in the food distribution sector. The originality of this study is to measure if the general conclusions on SSCM benefits and competitive advantage can be applied to the Walloon environment.

Limits of the study

The SSCM theory is very wide and it's possible that some of the theory was omitted because it seemed not relevant in the context of the study. The background of the writer might play a role in the discussion even if he is trying to remain objective. The survey results can be a great indicator, but the questions remain simple and the skills of the writer in terms of marketing are limited.

PART I: LITERATURE REVIEW

In the context of this master thesis, it's crucial to first analyze the concepts that will be exposed during our research. This section is divided in different categories. First the following domains are defined: Supply chain (SC), Sustainability and Competitive Advantage (CA). Afterwards, the links that exist between 3 domains are discussed in the case of Sustainable Supply Chain Management (SSCM) in the food distribution market. Last, we summarize the main drivers, benefits and the barriers to the implementation of Sustainable Business Practices (SBP) implementation.

1.1 Supply Chain Literature

Supply Chain is often defined as the complete process that a product will follow from the raw material to the final product which ends in the hand of the consumer. The two first people who started talking about Supply Chain Management (SCM) were two consultants in the 80's who viewed supply chain management as a way to manage resources and assets more proficiently (Ellram and Cooper, 2014). Supply chain management has traditionally been viewed as primarily operational, with a major focus on reducing cost. Over the past twenty years, this perspective has significantly evolved as firms realize that they can use effective supply chain strategies to create competitive advantages against competitors. In a financial world that seeks increased return on investment, effective supply chain management can help to increase revenue (extended markets and accelerated product/service innovation), lower cost (lower cost for materials, production, inventory, transportation or taxes) reduce assets (leveraging outsourcing or improved asset utilization) and improve sustainability (reduce waste and reduce exposure to resource, political, criminal and financial risk) (Jayaraman, Klassen and Linton, 2007.; Ruiz-Benítez, López and Real, 2018) Interest for Supply Chain management has also grown when firms understood that they could no longer compete without considering their suppliers.

Even if the popularity and the use of SCM in academic and business environment is growing, there remains considerable confusion regarding its definition because, as indicated by Habib (2014), some authors defined SCM as the flow of materials, information flow, financial flow and products (Waller and Roberts, 2003) while some consider it as a management

philosophy. Chicksand et al. (2012) pointed out that there is no final and precise definition for the SCM. (Ellram and Cooper, 2014)

One the most famous and used of SCM is: “Supply Chain Management is a systemic, strategic coordination of the traditional business functions and the tactics across these business functions within a particular company and across businesses within the supply chain, for the purposes of improving the longterm performance of the individual companies and the supply chain as a whole.” (Mentzer et al. (2001). From an operational view, there exist the definition of the SCM from Hugos: “SCM is the coordination of production, inventory, location and transportation among the participants in a supply chain to achieve the best mix of responsiveness and efficiency for the market being served.” According to Mentzer and al: a supply chain consists in at least 3 entities (organizations or individuals) involved in downstream and upstream flows of products from a source to a customer. Afterwards, he defines 3 different degrees of SC complexity. Direct, extended and ultimate. (Felea and Albastroiu, 2013). *Direct* refers to the central organization, its supplier and its customers. *Extended* refers to the supplier of the supplier of the central organization and the customers of the customer of it. *Ultimate* includes all organizations that are involved in every flow in the process from the ultimate suppliers to the final customers. That type of SC can also be named End to End SC.

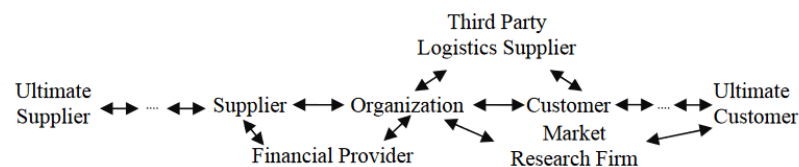


Figure 1. Example of ultimate SC. (Felea and Albastroiu, 2013)

1.2 Supply Chain Core Activities

In the next section, we define what are the main activities of a SC in the food distribution sector. This only represents an overview of all the flows that exist.

1.2.1 Sourcing and Procurement

The first step of the value creation process of a company is to buy the material that you will use to make your business flows. The objective of this activity is to find the right volume

at the right price at the right location of what the company needs. Demand management is key in this activity in order to avoid waste and the negatives effects that come along. The supplier selection criteria can be upgraded into sustainable supplier selection criteria where the common set of criteria is incremented with a social and environmental dimension (Tundys, 2016).

Aspects	Criterion					
Economic (logistics)	1.	Costs (including environment al cost)	20.	Scope of the technical support		
	2.	Price	21.	Fulfilment of the contract obligations		
	3.	Product quality	22.	ISO 1400 x		
	4.	Technological capabilities	23.	"Green" image		
	5.	Reliability	24.	Environmental competence		
	6.	Previous cooperation	25.	Initiatives related to green R & D		
	7.	Manufacturing Facilities	26.	Formalized control of pollution in the company		
	8.	Financial abilities	27.	Implemented the recycling system		
	9.	Flexibility of supply	28.	Control of consumption of resources (water, energy, raw materials. The use of the renewable energy)		
	10.	The total transport costs		29.	The use of "clean" transport	
	11.	Long-term relationships (length of signed contracts)	environmental	30.	Disclosure of information (relating to environmental aspects)	
	12.	Delivery time		31.	Interests and rights of the employees	
	13.	Partnership		32.	Rights of the stakeholders	
	14.	Potential of the suppliers		33.	The occupational Health and Safety	
	15.	The financial condition of the suppliers		34.	Implementation of the environmental policy	
	16.	Location		Social	35.	Social engagement (including the employment of people with disabilities)
	17.	Punctuality of delivery				
	18.	The scope of the product services				
	19.	Lead time				

Figure 2. Sustainable Supplier Selection Criterion list. (Tundys, 2016)

The goal of this activity is to find the right suppliers to develop strong and resilient partnerships that can be maintained in the future. The way a company will source all of its goods will say a lot about its strategy. Indeed, each organization is only as sustainable as its upstream supply chain (Handfield et al., 2005; Krause et al., 2009). The sourcing strategy has a considerable impact on the food distribution sector. The distributors might purchase final products from another focal company or might directly go to the producer to afterward produce its own-brand products. However, the distributors have no control on the production process and the manufacturing steps. This is why the choice of a trustworthy supplier is required here.

1.2.2 Logistics

This paragraph refers to all the processes that will happen to the goods between the producer or supplier and the final customers. It concerns essentially the transportation, the warehousing, the quality control and the internal distribution. In Sweden, for example, statistics regarding food waste show that industrial producers generate 171,000 tons of waste per year, wholesalers and retailers, 63,000 tons, and households for 270,000 tons (Swedish Environmental Protection Agency 2013). If we only observe the segment represented by the wholesaler and retailers, this amount of waste is majorly due to the process named earlier.

Besides waste negative impacts, the transportation has also an important environmental cost. Those can be measured in food miles and afterwards calculated according to the type of vehicle (airfreight, sea freight, train etc.) (Weber and Matthews, 2008) The warehousing can represent a risk in term of waste if the shelf life of the products are not respected. All these operations can be improved.

1.2.3 Retailing

The last operation is the sale of the products in the shops. This is where the food companies have the contacts with the clients, where they can influence them and measure their preferences. (Juhl, Kristensen and Ostergaard, 2002). The challenge is to gather enough information to be able to improve the rest of the SC. The Information Technology will be helpful in this context. (Grewal, Roggeveen and Norfalt, 2017) However, the retailing and the distribution as we know it is most likely to change in the next year with the arrival of new technology and market trend. (Accenture, 2019)

1.2.4 Stakeholders management

The integration of the stakeholder and having an effective communication strategy with them is becoming vital. The access to information is getting easier and it's therefore crucial to share those with your stakeholder to optimize the common performance. The general premise of these approaches is that a company is no more sustainable than its supply chain (Krause et al., 2009) and that a holistic perspective is required to improve environmental performance. Freeman stated that stakeholder can be defined as 'groups and individuals who benefit from or are harmed by, and whose rights are violated or respected by, corporate actions' (Freeman, 2001 and McVea, p. 42). The most important external stakeholders that impact and are impacted by the supply chain of the company are:

- Governments imposing international and national regulations.
- Customers and consumers.
- Competitors
- Suppliers

The importance of stakeholder's management for sustainability or related CSR efforts has been subject of many articles and is well demonstrated in the definition of corporate sustainability by Dyllick and Hockerts.(2002). Lanza et al (2013) have gone as far as to say that

the weakness in existing business models is because of the reluctance to share information. Therefore, it supports our theory that the communication is crucial to enhance the relationships with the stakeholders.

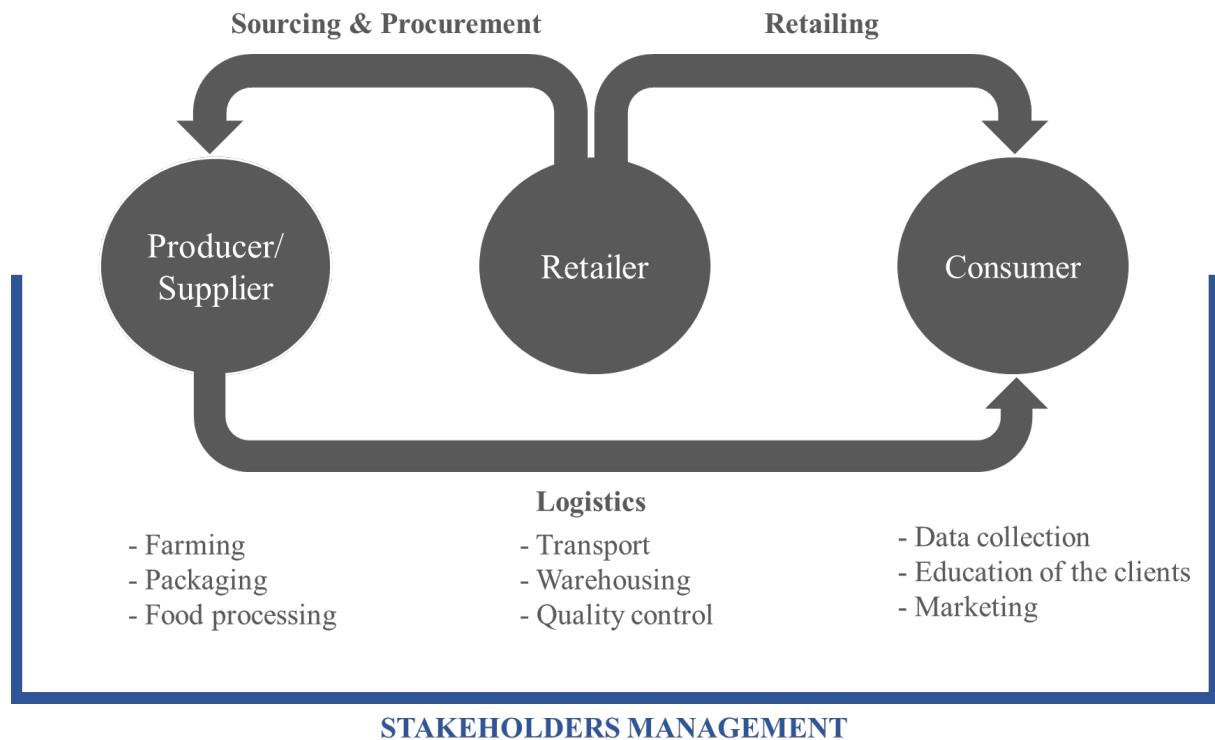


Figure 3. Principal activities and stakeholder of a food SC.

1.3 Sustainability Literature

The goal of this chapter is to define the concepts that will be useful in our study while limiting the scope of this topic that tends to get a little too wide. Over the past few years, global organizations have recognized sustainability as an increasingly important strategic goal. (Siegel, 2009) About 80 per cent of the world's largest 250 companies report on their social and environmental performance, up from about 50 per cent in 2005 (GRI, 2010). But what, really, is sustainability?

The most frequent definition of sustainable development is the 1987 version of the World Commission on Environment and Development, also called the Brundtland Commission. Sustainable development is defined as ‘development that meets the needs of the

present without compromising the ability of future generations to meet their own needs' (Our Common Future, The World Commission on Environment and Development 1987, p. 43) an ideal so indefinite as to be meaningless. In the past, many literatures discussed the two first pillars not considering enough the social dimension. But nowadays, besides environmental performance, the social performance of food products is also getting more and more attention from the stakeholders. (Arcese, Lucchetti and Merli, 2013)

Hereby, the authors and researchers would like to find a wise balance between those three. John Elkington (1998) introduced the concept of the triple bottom line. "It's a theory that recommends that companies commit to focus on social and environmental concerns just as they do on profits." Usually, companies only look after the financial bottom-line of the company but Elkington wanted to bring into this equation the real cost of selling goods, meaning the other impacts that the activities can have on a social and environmental dimension.

The UN Sustainable Development Goals (SDG) play a key role in the mediatization of this transition to a more sustainable way of living. They created a list of 17 goals linked with the sustainable development. On the other hand, the supply chain of a company cannot focus on all of them. You can find in the annexes more information on the SDG.

The following list counts the goals where progress is achievable and measurable in the context of food sector:

- Goal 2: Zero Hunger
- Goal 3: Health
- Goal 4: Energy
- Goal 8: Economic Growth
- Goal 10: Inequalities
- Goal 12: Sustainable Production and Consumption
- Goal 13: Climate Change
- Goal 14: Oceans
- Goal 15: Biodiversity, Forest and Desertification

For each dimension, we can find plenty of performance indicators that may vary depending on the sectors where the company operates. (Gardas, Raut, Jagtap and Narkhede, 2019 and Bell and Morse, 2008) stated that sustainability indicators must be: specific

(outcome bound); quantitative (measurable): usable (of practical value); available (data easily collated); cost-effective (not expensive to collect); and sensitive (demonstrate changes in circumstances). This does not preclude the use of qualitative indicators, but by their nature qualitative indications do not drive business performance and continuous improvement. Besides that, many non-profit organizations and associations propose different tools that help you in this measure. The results can be a great milestone in the sustainability project of a firm. However, even Elkington says that it's challenging to measure social and environmental performance at the same time. Monitoring and measuring the performance of every members of the SC can create a complex challenge. Once an objective has been fixed, there should measurable targets that are linked to those. The main challenges are (Hervani, Helms and Sarkis 2005 and Wong and Wong 2008):

- Managers lack understanding of metrics applied in multi- organizational context.
- Managers and organizations lack the control of inter- organizational metrics.
- Different goals and objectives among organizations in the chain result with different measures.
- Incompleteness and inconsistencies on PM among SC partners.
- Information systems are incapable of gathering non-traditional information relating to SC performance.
- Lack of standardized performance measures in terms of units to use, structure, format etc

In this context, the companies often expose their goals and initiatives through the CSR department and their sustainability report each year. The CSR definition is a bit different in terms of what the expectations are from the practices. It refers to a code of conduct and action beyond what is required by laws, regulations and trade rules, but it can be any steps representing a social benefit or an eco-friendly act. However, the final goal of those benefits is to improve the financial results of the company.

1.4 Competitive Advantage Literature

In this paper, we aim to define if Sustainable Supply Chain Management (SSCM) can be a key strategy to develop a competitive advantage on the market nowadays. Therefore, we must first define what we consider as a competitive advantage.

Multiple definitions have been stated by authors, but they converge towards the same idea. “Competitive advantage is a favorable position a business holds in the market which results in more customers and profits. It is what makes the brand, product, or service to be perceived as superior to the other competitors.” (Porter, 2004)

The idea of Porter was that his theory could assess if you are leading on your market and how you could maintain it. He puts a focus on sustainability in his proposition. To dig further into this concept, we are also analyzing a possible CA with Natural-Resource-Based-View approach. (Hart, 1995) This is a theory of competitive advantage based upon the firm's relationship to the natural environment. It is composed of three interconnected strategies: pollution prevention, product stewardship and sustainable development. Hart states that according to NRBV, initiating green practices can lead to CAs in terms of lower costs, reputation, legitimacy, future position and long-term growth. This was the result of an analysis of the well know theory of Hart.

In addition, Porter (2004) states that they are 3 main strategies:

- *Cost leadership*: It's often related to a cost-cutting strategy. It might include low skilled labor and therefore minimum wage or even lower payroll, however it can also be linked to scale economies.
- *Differentiation*: It means that the company is able to provide something more than its competitors. This advantage can take many different forms but will often be represented by an extra willingness of the target market to pay.
- *Focus*: This strategy consists in best knowing the best your target and using the information you have to obtain results that your competitors can't. It is used by the smaller scale companies to fight against large companies.

Besides those three main strategies, there exists other in the modern days such as the loyalty that a customer will feel for a brand or the network effect: a customer will usually go for a service that everyone else use to be part of a movement.

According to the problematic of this master thesis, a focus is put on the differentiation advantage. Indeed, this CA focuses on the customer and its willingness to pay for products. We will later measure if the SSCM in the food industry can bring that type of advantage in a highly competitive market.

1.5 Sustainable Supply Chain Management

After those three first topics, we can tackle interlinked topic: The Sustainable Supply Chain Management (SSCM).

The subject of sustainable supply chain management (SSCM) has gained increasing attention in the last decade (Kleindorfer and al., 2009, Linton et al., 2007, Matos and Hall, 2007, Vachon and Klassen, 2008, Pagell and Wu, 2009 and Seuring and Müller, 2008). SSCM is defined by Seuring and Müller (2008) as “the management of material, information and capital flows as well as cooperation among companies along the supply chain while taking goals from all three dimensions of sustainable development into account which are derived from customer and stakeholder requirements. In sustainable supply chains, environmental and social criteria need to be fulfilled by the members to remain within the supply chain while it is expected that competitiveness would be maintained through meeting customer needs and related economic criteria.” However there exists at least 12 different definitions according to Payman and Cory (2013) who made a literature analysis of the definitions of SSCM and Green Supply Chain management.

This definition shows that there are no precise objectives except the ones of the sustainability, which as explained earlier, are general. However, the importance of the cooperation between the actors is raised to keep the three dimensions into consideration but also to integrate the different stakeholder of the SC.

Below, we will summarize with a graph the main actions that are put in place in the domain of the SSCM according to the study case of a food wholesaler in South Africa (Santos, Svensson, Padinand Hogevoold, 2015):

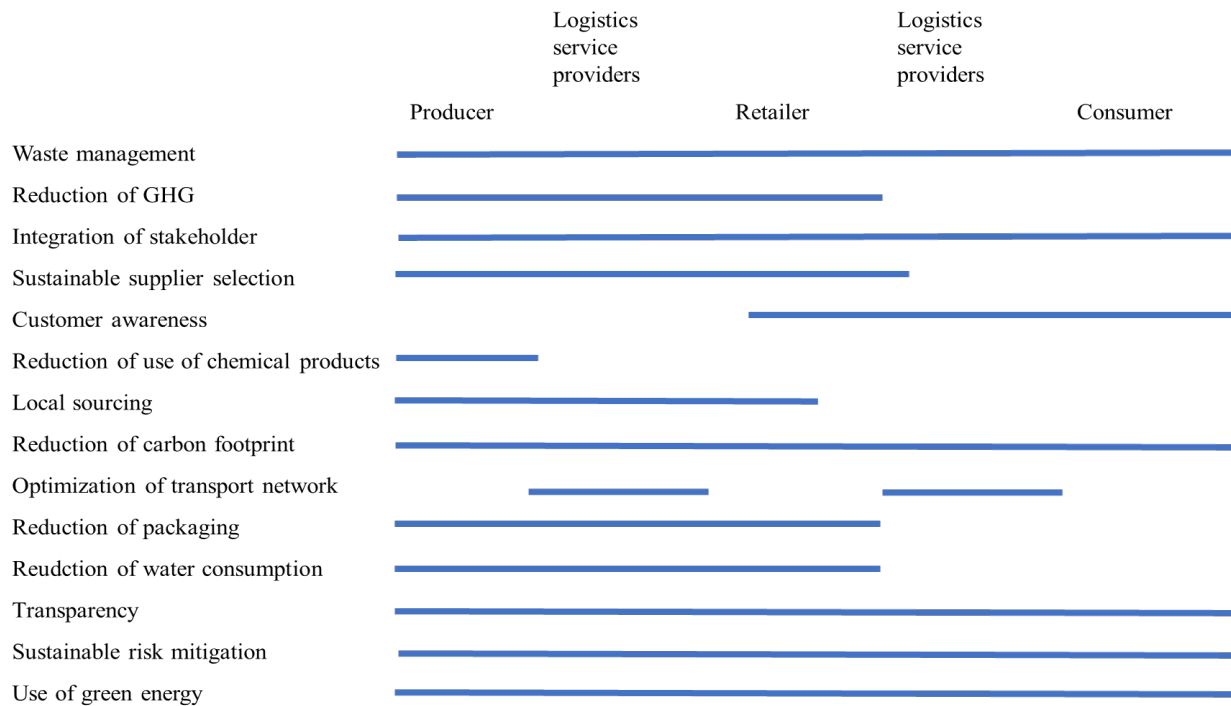


Figure 4. Example of SBP and the stakeholders concerned.

All these activities that are not simply executed for a financial result are often called Sustainable business practices (SBP). They are defined as corporate policies and actions that attempt to satisfy the various stakeholder groups of the firm in order to insure long-term competitiveness. This definition goes further than the common definition of business practices. Indeed, sustainable business practices ensure that present needs are met without compromising the ability of future generations to meet their needs to include other stakeholder groups in addition to the environment.” (Mefford, 2011)

1.6 Sustainable Supply Chain Management impact in the Food Sector

1.6.1 Context

The food companies are permanently looking for opportunities to reduce their cost, enhance their brand value and reduce their environmental impact. SSCM appears to be a solution that can help the firms in this direction. (See benefits section 1.6.2)

Particularly, food supply chains have been highlighted in the sustainability literature as one that faces the most significant supply chain challenges (Beamon, 2008). The main challenge appears to be how to provide food products efficiently and effectively while meeting the growing demand for food for an estimated global population growth of 34 percent since 2009, to 9.1 billion people in 2050. (FAO, 2009)

In contrast, figures indicate that around 25% of all food produced is wasted during the SC (Bilska and Wrzosek, Kolozyn-Krajewska and Krajewski, 2015) And this amount excludes the waste that are produced inside of households which is estimated to nearly 20% of all purchased goods in UK. (WRAP, 2009).

If the company only look at their own social and environmental cost, it only represents a small piece of what their activities is usually doing. For example: the food and beverages industry's supply chain environmental cost is 20 times higher than the direct impact of the company. (McKinsey, 2016) Therefore the first challenge in this context concern the assessment of the impact of the products. With the product lifecycle assessment, the external impacts on external stakeholders and environment must calculated. (Hagelaar, 2001)

The mitigation of the risks is of uppermost importance. If we take a NRBV approach, we must have long term view on the products we will sell. (Hart, 1995) The natural disasters are more and more frequent and can cause serious damages to a company. Therefore, it's a risk that must be mitigated by having a resilient supply chain but also by reducing the environmental impact of the company:

- Damages to assets and physical property
- Damages to raw material
- Supply Chain disruptions
- Workers are unable to do their jobs

By looking at the stock value of the publicly traded consumer company, we can observe that half of the value is represented by the value of the expected growth. Therefore, this value might be impacted by the sustainability risks linked to the supply chain of food companies. We assume that the sustainability of the supply chain of a company can have a significant impact

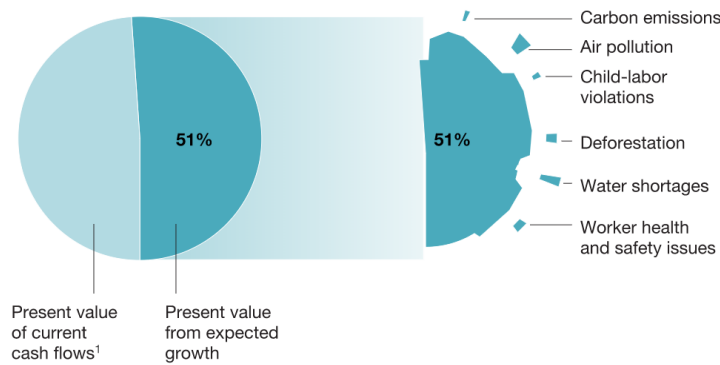


Figure 5. Percentage of the shareholder value which is risk-vulnerable (McKinsey, 2016)

The firms with a global supply chain must weigh the cost savings from lower labor costs against the penalties and damages that can happen because of unsustainable practices such as environmental pollution, sweatshop labor etc. Companies are increasingly expected to act responsibly throughout their supply chains (Walker and Brammer, 2009; Klassen and Vereecke, 2012), and failure to do so can have significant consequences for their reputation and financial performance (Phillips and Caldwell, 2005).

Five years later, many people still remember horsemeat scandal in the food industry. The issue came to light on 15 January 2013, when it was reported that horse DNA had been discovered in frozen beef burger sold in several Irish and British supermarkets. (Stanciu, 2015) Those events show the level of magnitude of those event that are related to the customers.

We see that the information flow is growing annually. according to some estimates, the amount of data produced worldwide is doubling every two years.(IDC, 2018) Those data can be helpful in understanding the customers' expectations, improving the demand forecasts but also to verify the origin of the product sourced by example. The technology and the data will be key for the development in SSCM.(Lin, Zhou,Spiegler,Nguyen and Ieromonachou, 2018) Those examples were cited to highlight that the Food Supply Chain has still a long way to go to get more sustainable. But this environment is full of opportunities but also threat that must be managed cautiously.

1.6.2 Drivers

Different types of internal and external drivers can be found in the scope of the SC of the firm. The SSCM literature identifies varied types of stakeholders that create pressures for sustainability and influence firms to adopt sustainable thinking or goals (Zhu et al., 2005; Gonzalez-Benito and Gonzalez-Benito, 2006; Wolf, 2013). These mechanisms include: regulatory pressure from the government, customer requirements, consumer pressure (Carter, Dresner and Dong 2001; Bjorklund, 2011), showed that carbon-based food taxes may reduce emissions and, at the same time, help to change consumption patterns towards healthier diets (Delmas (2001) found a strong and positive impact of external stakeholder involvement (customers/clients, shareholders, community members, distributors, and regulatory agencies) on competitive advantage, successful competitors (Sarkis et al., 2010), investor pressure, employee commitment, owner/manager values (Walker, Bourne and Shelley, 2008), supplier collaboration initiatives and attention from NGOs (Hall and Matos, 2010) external stakeholders can regulate or mobilize public opinion (Zhu and Sarkis, 2006); employee and managerial stakeholder pressure can result in a virtuous circle of proactive environmental strategies (Sarkis et al., 2010). Obviously, stakeholders play key roles in multiple way in the supply chain of consumer companies.

This article “Stakeholder pressure in sustainable supply chain management: A systematic review” was published by Mexiell and Luoma (2015). In this analysis, they aim at giving an overview on how the stakeholder can influence the firms to change their vision on the sustainability issue. The authors used a systematic review process to study the empirical evidence pertaining to how a stakeholder perspective helps to understand sustainability in the supply chain management domain. They analyzed more than 250 articles to publish this literature review that proposes different models on the stakeholder pressures and the effect in the supply chain decision area.

Meixell and Luoma (2015) create a list according to the level of recurrence of certain stakeholders in the analyzed articles. The search terms were Sustainability, Stakeholders and the supply chain decision areas. CSR and TBL were also in lieu used. The results are as followed:

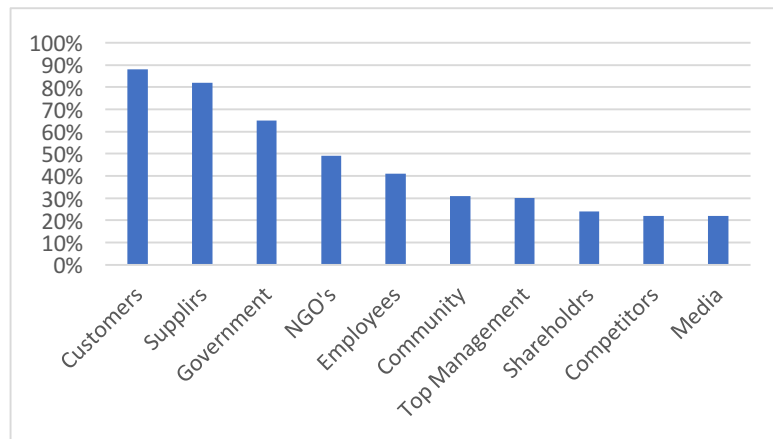


Figure 6. Percentage of articles discussing the influence of “x” stakeholder

Besides those stakeholders, we also found infrequent stakeholders such as: universities, technology consortiums, complementary innovators, safety advocates, external evaluators and rating indexes, alliances partners’ society or the public at large.

The authors highlighted three key messages: The stakeholder pressure on sustainability in supply chain management can translate into sustainability awareness, creation of sustainability objectives, and/or implementation of sustainability business practices as explained earlier.

In this context, all of those stakeholders are looking to pressure the firms in order to obtain results and implementations of SBP and SSCM actions, but the results are not always practical. (Zhu et al., 2005) The results will significantly depend on the resource capability of the firm (Seuring and Müller, 2008) and the level of influence of the stakeholder.

Three stages of the sustainability in a company:

- The easiest step to reach is the awareness of the sustainability issue or at least being informed of it. It can also be the awareness of a sustainable practice that could help the company in its activities.
- The second step is the adoption of goal or objectives according to this awareness. The customers, investors and NGO’s, the employees and the government have the influence to push a company towards this direction. The sustainable development goals, the “Paris agreement” are great benchmarks to use in the case of the adoption of a goal. (Carter and Dresner, 2001 and Bjorklund, 2011)
- The third and last opportunity in this escalation is the implementation of a practice. External stakeholders such as customers, NGO’s, government and shareholders have the power to

regulate or to create a public opinion. However, the most powerful primary stakeholders which are capable to force the implementation of a Sustainable practice remains the customers and the clients. (Sarkis et al., 2010)

It's obvious that companies will usually escalate these steps in the order explained, though, there is no defined time schedule linked to the implementation of SBP. Some companies might go very fast from awareness to implementing while some companies can take years from having objectives to implementing practical. (Meixell and Luoma, 2015)

Different types of stakeholders might have different influence and opinion in the sustainable supply chain decision areas. It was noticed that some stakeholders are most likely to influence some activities of the SC. For example, Ehrgott, Reimann, Kaufmann and Carter. (2011) stated the importance of the influence of the employees and middle managers as a stakeholder group on the supplier selection or for the transportation services. It appears in the same study, the positive pressure from the customer related to socially sustainable supplier selection. The government is mentioned as a pressure especially in the form of regulations, but it was observed that the expected value of influence is not consistently realized. Still, the authors on this topic tend to disagree on the practical influence of the government of the SSCM. It tends to create environmental awareness but not an important factor of decision at the logistics level according to Gonzalez Benito (2006) The US government generally has a low influence on product development and design in the US, although the Australian government has a very high indirect impact. (Polonsky, Rosenberger and Ottman, 1998) The media has been influential in purchasing decision while the shareholders were more influential in logistics decisions.

Those example shows that there are interrelationships between the stakeholders and what can be achieved for the SSCM. The level of influence of the stakeholders might vary depending on whether the sustainability issue is environmental or social. It has been shown that some stakeholders might be more interested in just one dimension of the sustainability. For example, the literature reviews show that employees would be more interested and reactive concerning the social dimension of the Supply Chain. For example, IKEA's employees were the pioneer of the code of conduct for the supply organizations at IKEA. The employees fight for the payment of fair wages and safety on their workplace for employees of suppliers. The company Levi Strauss has seen an increasing pressure of its employees to develop and

implement a code of conduct for the supplier of its garment. Employees recognized that implementing that type of SBP was a way for them to be proud of the brand they were working for. Mont and Leire (2009)

Lately, with the help of the information flow, media and NGO's have tried to identify and expose unsustainable practices in the third world countries to the public to put social pressure on them. (Wolf, 2013) The role of the NGO's, however, is not limited to the one of the reporters. They can establish partnerships with firms, showing them the way to overcome the barriers of traditional SC issues. "The NGO relationship provides strategically valuable attributes such as enhanced legitimacy for LCA results".(Schrader, Freimann and Seuring. (p. 1093), 2012) the skills of non-traditional supply chain partners are particularly important to create legitimacy and overcoming the gaps between the focal companies and its communities.

If we consider more specifically the environmental dimension, it has been shown by Walker et al. (2008) that the external stakeholders such as the regulations from government, customers' opinions, society view and competitors' technologies were all highly influential as drivers of Green Supply Chain Management practices implementations in different industries including the consumer goods in the UK. The fact that external factors were more influential than internal factors wer highlighted by Agero, Lavastre and Spalanzani.(2012) and Arimura, Darnall and Katayama (2011). On the other hand, this notion is refuted by Bowen, Cousins, Lamming and Farukt. (2001) and Caniato, Caridi, Crippa and Moretto (2012) who argue that external and supplier capabilities are crucial in SSCM implementation.

The conclusion is that there are no precise effects produced by the influence of a determined stakeholder on the implementation of SSCM practices. Most of the research is still focusing on a specific aspect of the TBL avoiding the complication of considering the 3 aspects. The least popular aspect remains the social dimension. A last point concerns the link between the stakeholder pressure in any form and the performance of the firms. There is a lack of articles linking those two subjects. (Wolf, 2013) It might due to the gap of information that exists in the concrete effect of each type of pressure of the different stakeholders. Although SSCM influence somehow the TBL performance, it's hard to link the stakeholder pressure that drives the implementation of the SSCM to the TBL performance.

After all those discussions concerning the pressures applied by the stakeholders and the environment, we will further analyze the advantages that companies are looking for while integrating the sustainable aspect in their SC.

1.6.3 Benefits

“First, companies should invest in understanding where opportunities lie to focus resources where they will have the most impact. Also, environmental and social performance factors should be embedded alongside factors of cost, quality, supplier reliability, and trust, to achieve and sustain efficiencies.” (BSR, 2011)

It was demonstrated by multiple company initiatives and industry-led coalitions that the corporate management observe considerable benefits to be earned from including a social and environmental dimension in their supply chains. Different association of firm's part of the same industry, such as the Sustainable Apparel Coalition (here the fashion industry), where companies such as H&M and Levis are grouping to create platform to help themselves and other companies to measures and improve their supply chain performance in term of sustainability. Famous brands as Unilever, Walmart and Procter & Gamble are working hard every to see improvement in their supply chains. (ZHDC, 2011) The food industry is often called for more sustainable improvement. However, it has been working for several years to this end due to the multiple pressures and improvement can be observed in their sustainable report.

Different potential benefits can be taken away from the literature about SBP implementation. (Meeford, 2011) (Chakravarty 2015) Those benefits are usually the results of long-term strategy results, the quickwins are more rare than what usually limits the willingness of the company to implement them. (Carter and Rogers 2008 and Li et al., 2015)

A) Reduction of emissions and costs

This benefit has a financial and environmental aspect. One of the reasons for these benefits, are the regulatory dimensions that forces the companies to reduce their environmental impact. Walton, Hanfield and Melnyk (1998) Hall (2001) For example, more than 40,000 companies have implemented ISO14001, the environmental management system standards. (Diabat and Govindan, 2011) They are required to provide proof of their improvement and commitment to agreement such as the one of Paris. As we know, governments

started applying regulation on the accepted level of emissions. (European Commission, 2015) Therefore, the companies that exceed some defined pollution threshold are being charged according to the carbon pricing. Therefore, they have a double incentive to reduce those. On other hand, the reduction of energy consumption is a saving in itself. (European Commission, 2018)

“Walmart is a good example here. When the retail giant announced its goal to reduce corporate greenhouse gas emissions by 20 million tons per year by 2020, it realized that its supply chain represented about 95 percent of Walmart’s overall carbon footprint. Walmart is working with suppliers to reduce their emissions, which not only reduces environmental impact but saves money, too. A Carbon Disclosure Project report published last month found Walmart and other major companies’ supply-chain emissions reduction initiatives saved suppliers a combined \$12.4 billion in 2016.” (BSR, 2011)

Dono and Mazzapicchio (2010) analyzed the possible economic impact of climate change on the farm sector. Emission gases and their effect on the climate and the environment can highly impact the food and beverages sectors by changing the prices of the raw materials. Therefore, they have another incentive to reduce those. This argument joins the NRBV approach discussed before where the entire life cycle of a product need to be assessed.

We observe that the price of green energy is significantly decreasing nowadays which can significantly influence the future choice of the companies on their way to consume energy. (Murray, 2019)

B) Improving the continuity of supply

The principles of SSCM highly recommend increasing and enhancing its relations and the communication with its suppliers and partners as we have in the definition of Seuring and Muller (2008) By focusing on its ultimate SC and not only on its own activities, the distributors can mitigate and prevents risks and that way, transform their SC into a more resilient organization. (Mentzer and Manuj, 2011) Indeed, the distribution activities depend on the activities of their suppliers, therefore the security and continuity of the suppliers’ activities should be as high as the primary.

The resilience of a supply chain is its capacity to adapt and resist to unforeseen changes. There is a link between Sustainability and Resilience; indeed, we could consider the resilience as a measure of performance of the sustainability if we consider it as a sub-section of the

sustainability that the Dow Jones Index defined as “a business approach that creates long-term shareholder value by embracing opportunities and managing risks deriving from economic, environmental and social developments” (RobecoSAM, 2019)

C) *Efficiency and innovation*

By redesigning its SC in a more sustainable way, the company might address different issues such as environmental and social impacts (Varsei and Polyakovskiy 2016). However, efficiency might be one of the potential outputs that SBP can bring into your model. The fact of reconsidering the way you use your resource will create a more responsible use of it. Sharma and Vredenburg (1998) stated that environmentally responsible management can lead to numerous organizational benefits such as increased efficiency, productivity, process innovation and knowledge of management operations as it was said before, a company that can make a better use of its resource has a potential advantage on its competitors. (Hart, 1995)

By rethinking its processes, working with different partners and diversifying its portfolio of suppliers, the firm can learn precious insights about its sectors and the latest technology. The innovation is crucial in every sector in term of competitiveness however, food and drink industry innovate less than the other sectors. (Eurostat Science Technology and Innovation database, 2008). If we want to translate sustainability into a competitive advantage companies must anticipate the new trends linked to the customer’s needs but also all the processes that can be enhanced via innovation. Therefore, we can conclude that innovation is beneficial but also a requirement.

Below can be found the main innovation objectives in the food industry in 2008. We can see that there exist multiple potential advantages.

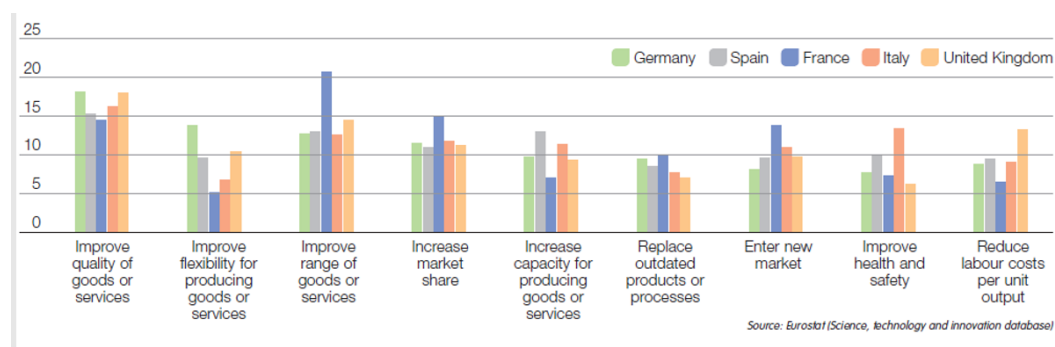


Figure 7. Ranking by European country of the important innovation objectives (Eurostat Science Technology and Innovation database, 2008)

A great way to innovate in SSCM is to recruit new talents in this domain. According to Dubey, Gunasekaran and Papadopoulos (2018), there is a shortage of talent in this sector. There are some skills that are required, and the talents must be trained accordingly to it to be able to develop afterward the company in a sustainable direction with the image of a company having an important impact on the job seekers, we can see the virtuous circle that exists between the innovation, the sustainability and the talent recruitment. (Cable and Turban, 2003)

D) Protection against reputational damages and brand equity

Unsustainable practices or product safety in the food industry can lead to an important impact. (Skees, 2001) The effects are multiple: negative impact on the share value of the company, reputational damages, loss of market share, bad publicity. All of those are linked to the brand equity of the company. (Thaler, Herbst, and Merz, 2015)

Indeed, SBP implementation doesn't only contribute to prevent the risk for the companies. By proving to the public, its commitment and showing sustainable results, the brand equity and general opinion tend to be improved. Strong brand equity not only improves the number of loyal clients who purchase more but also allows higher prices to be charged without paying too much attention to the competitors' price. Reinhardt (1999) discusses how differentiation of the product allows firms to charge a price premium. This theory directly refers to the differentiation strategy of Porter discussed before.



Figure 8. SSCM linkages with higher stock price according to Mefford (2011)

Colicchia, Wagner and Kim (2018) state the potential negative effect of Supplier Sustainability Risks (SSR's) on shareholder value. In this study, the risks are linked to the social aspect of the sustainability. they explain that they are two different possible risks, the one linked to the product and the one linked to the process. Process related risks refers to suppliers ethical/moral misconducts that is associated with process violations such as Nike's child labor, Starbucks unfair trade etc...Product-related risks reflects suppliers ethical/moral misconduct

that is associated with product violations such as the “Horsemeat scandal”, Yums’s antibiotics in chickens etc...

Of course, the market reacts negatively to those risks when it’s disclosed by media or NGO and it is most likely to affect negatively the brand image of the company. As the customer has a vision on these risks, it is then translated by an interpretation of the investors. It was shown after a study that a negative result happens in a two-day window after the event. (Colicchia and Al, 2018) The focal firm tends to be held as responsible for its supplier’s actions and therefore we can conclude that its image is vulnerable in case of sustainability risk within its supply chain.

It was also shown that CSR policy can sometimes work as a kind of buffer or insurance in case of social or environmental scandals. However, it doesn’t not always work, especially in the case of product-related risks. (Kim and Woo, 2019) It can also have a negative effect for the customers proving the misalignment between vision and operations. (Sohn and Lariscy, 2012)

The following benefits tend to neglect the social and environmental benefits. Yet, these benefits are the result of actions that are primarily intended to enhance the social and environmental dimension. Therefore, we try to focus and highlight the positive economic impacts that SBP can create in food sector. Additional possible benefits exist, but those categories are a great overview of the different topics that can be affected by SSCM practices. We can observe that many of those benefits are interlinked with each other’s.

1.6.4 Barriers

Literature mainly discuss the benefits and the needs of a more sustainable development but it tends to underestimate the barriers that exist and the tensions that might be caused by the implementation of SSCM practices. The decision to implement SSCM is often constrained by lack of information (Pagell et al., 2010), limited resources (Seuring et al., 2008), conflicting priorities (Brammer and Walker, 2011) and lack of know-how and capabilities (Closs, Speier, and Meacham., 2010). Özçelik & Öztürk (2014) insist on the fact that some drivers can turn into barriers if not managed proactively.

Jia, Zuluga-Cardona, Bailey and Rueda (2018) created a list of barriers that the companies might face in developing countries. This list is the result of a systematic review between 2000 and 2016.

A) Lack of political support

As an example, “Government spending on agriculture compared to agriculture’s

contribution to the total economy has declined by 37 per cent; the ratio fell from 0.42 in 2001 to 0.26 worldwide in 2017. In addition, aid to agriculture in developing countries fell from nearly 25 per cent of all donors' sector-allocable aid in the mid-1980s to only 5 per cent in 2017, representing a decrease of \$12.6 billion." (UN, 2019). The lack of political support in developing countries is according to the article the most common one. The authors aim at the low level of local regulation and/or the weak enforcement of the regulations. Local suppliers feel like there is no governmental pressure or incentives to increase the sustainable practices.

This lack of policy implementation is often due to the fact that policymakers can't agree on the objective to be put in place. (Li et al., 2015) There is also a lack of local control and inspection put in place due to the lack of resource allowed to subject. (Azmat and Ha, 2013) Moreover, there is a gap between what's is expected by Western companies and what can be achieved in the developing countries. The regulatory frameworks often don't fit the reality. (Bartley, 2010, Ras and Vermeulen, 2007).

B) Lack of knowledge and awareness

Many authors point out the lack of awareness about sustainability issues in developing countries among suppliers and consumers. (Soda, Sachdeva and Garg., 2015). In Western world, we have enough information to realize the real cost of unsustainable practices. Due to their socio-economic conditions, consumers are more concerned with meeting their basic needs than with the quality of their purchases (Azmat and Ha, 2013 and Morris and Dunne, 2004)

There is also a lack of knowledge concerning the great sustainable practices that can be implemented at the supplier level. As we know, the implementation can be challenging. (Ras et al., 2007, Soda et al., 2015) Many suppliers claim the lack of help and support from the buying firm concerning the standards expected. The external pressures from stakeholders is unfortunately weaker compared to the pressure experienced in the developed countries. (Gough, Thomas and Oliver, 2019)

C) Corruption and mock compliance

Many countries still report corruptions from the side of many parties: certification bodies, government and companies themselves. Countries such as Brazil, Indonesia and South Africa and Bangladesh are concerned with this issue. Due to the lack of transparency and information's in some contexts, the suppliers are able to cheat and buy fake labels. (Morris and Dunne, 2004) They will not conform to new regulations through irregular payments to government agencies.

D) High economic costs

The issue here is the long-term view of the SSCM. There is not enough “quick-win” to make it attractive for many supplier or focal companies. (Li et al., 2015 and Riisgaard et al., 2010). Indeed, many suppliers cannot afford to wait the future benefits of the investment in SBP. On the other hand, there is a lack of resource and subsidies from the government and buyers’ companies to cover the certifications labels, the training etc.. (Soda et al., 2015)

E) Misalignment and social barriers

There are multiples factors that can lead to a misalignment between the strategy of the buyer and the local suppliers. Suppliers don’t see the purpose of the standards compared to the real needs. Therefore, the suppliers might be reluctant to the change. (Vermeulen and Ras. 2006). This behavior is often a sign of the lack of trust, credibility and transparency existing between the suppliers and the focal firms. Besides those problems, the difference of culture, language and values is also a day to day challenge for negotiations and decision making (Acutt, Medina-Ross and O’Riordan., 2004; Ras et al., 2007, Vermeulen and Ras, 2006 and Nyuur, Ofori and Debrah., 2014)

The misalignment can also exist within the focal company: a different vision between the CSR department and the procurement department creating a weaker support for the local communities. (Lam, 2011) It can create tensions within the organization to have divergent objectives. The time for the decision making might be extended due to the social and greener concerns. (Muller and Seuring 2008.) They also point at the higher economic cost and the lack of communication.

In addition, tensions are created because of contradictory forces and objectives or motivations. The divergence of interest might ruin the relationship existing between certain stakeholders. Those tensions can be translated into benefits if properly managed, but they are usually considered as the cause of strain and conflict in the new and older relationships. (Tura, Keränen and Patala 2019) Those tensions are can be classified into 4 categories that you can find in the annexes.

1.7 Synthesis of Theoretical Background

In the next paragraphs, we summarize concisely the topics that have been discussed before creating hypotheses that will be tested during our analytical part.

The different drivers of this evolution towards a more sustainable supply chain are particularly linked to the government policies and the customers' expectations. The growing pressure from the perishing environment push the politics to set up new requirement for the firm. On the other hand, the customers have an important role and their vision on the sustainable is significantly changing. The result is observable: the market share of the organic and more responsible products has grown every year in the last decade and the number of organic food shops and local retailers have doubled in 5 years. (Belgian Federal Government, 2017)

The potential benefits can be numerous if the distributors have the opportunity and the resources to implement SSCM practices. SSCM can prevent and mitigate sustainability risks and increase the resilience of the SC. SSCM tends to reduce the negative environmental impact and thereby reduce costs in the long term. The sustainability activities of a company can also increase the brand equity of a company. As we know, the image of a brand can be a key advantage towards your competitors. Innovation and efficiency may also be the results of SBP.

But where some people see opportunities other face barriers. From an organizational side: It was claimed by different articles that the high direct economic cost of sustainable investment was often considered as a barrier to the long-term results. The misalignment of vision within the company can slow down the process. From a supplier's point of view, the lack of knowledge and know-how is a significant factor. The lack of awareness of suppliers was also pointed to be limiting the development of the SSCM. From a customer side: The higher price of organic and biologic products is still a blocking point. The lack of awareness of the customers is also key

In addition, a general barrier, the lack of information shared is slowing down the evolution. Find below Figure 9 that highlights and summarizes the main drivers, benefits and barriers.

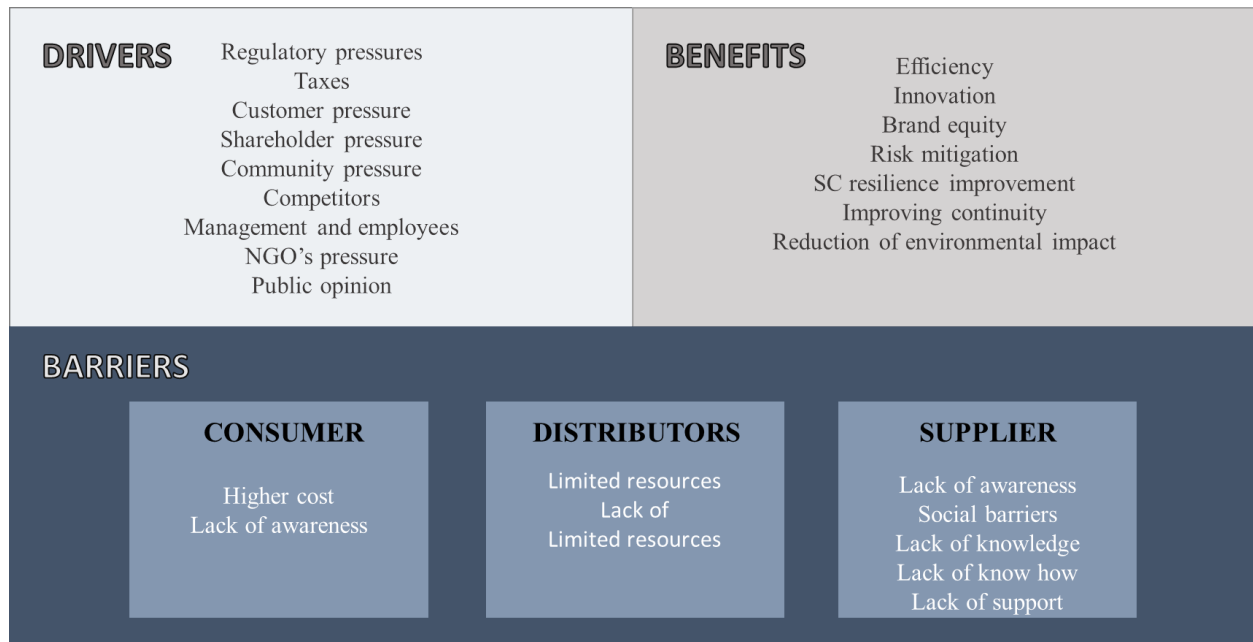


Figure 9. Main drivers, benefits and barriers discussed in the SSCM literature.

The primary problematic of this master thesis concerns the SSCM and if whether or not the implementation of this strategy can lead competitive advantage. It was hard to measure many benefits that are linked to the SSCM strategy due to confidential information from the company or because of several factors entering the equation and not only the SBP implementation.

However, the most measurable and available data seemed to be the customer opinion on this strategy's implication. With the following hypothesis, we would like to see if links exists between SSCM and a competitive advantage in the food sector.

Questions of research:

- 1. What can be the potential benefits brought by the implementation of SSCM for one company towards the customer opinion?*
- 2. Can the benefits of brand equity be considered as a competitive advantage in the food distribution sector?*

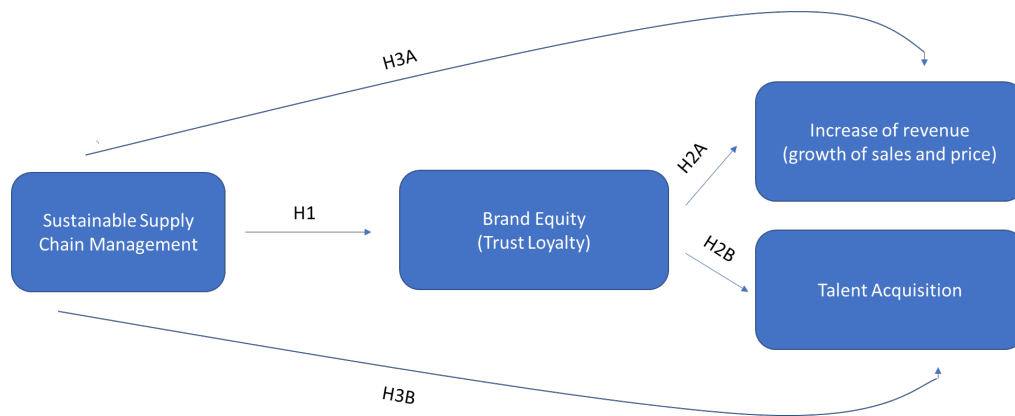


Figure 10. Model developed to measure SSCM direct impact on revenue and talent acquisition and indirect impact via Brand Equity.

This model aims to measure if the SSCM has an impact on the brand equity of a distributor. Afterward, we will measure if this brand equity can increase the revenue and improve the talent acquisition potential of this company. Last, we want to measure if the SSCM has a direct link with an increase of revenue and the talent acquisition.

H1: SSCM implementation can increase the brand equity of a company via SSCM strategy implementation.

H2A: Brand equity can influence the perception of the customers on products and in doing so increase the revenue of a company

H2B: Brand equity can influence the choice of talents toward their career choice

H3A: SSCM implementation can increase the revenue of a company.

H3B: SSCM has direct impact on the choice of talents toward their career choice.

These hypotheses will be tested according to the answers of a survey taken by random Walloon people.

PART II: EMPIRICAL ANALYSIS

2.1 Methodology

To realize the literature review, an analysis was made of the theoretical content available on Emerald Insight, ResearchGate and Google Scholar. The main search terms were “Sustainable Supply Chain Management – Drivers – Barriers – Benefits – Competitive Advantage “. The state-of-the-art of these topics allowed us to broaden the research. The NGO’s, associations and consulting firms post regularly content on the topic in a less formal way, but resourceful way.

After the literature review, four semi-directed interviews were scheduled with managers and directors to have a professional approach of the topic. You can find the interview questionnaire in the annexes along with a summary of the interviews.

In order to measure the customer expectations and their needs in the field of the sustainability, we created a survey and released it on the social media: Facebook and LinkedIn. The respondents are asked open and closed questions. The open questions consist of multiple choice questions, checkboxes and 1-5 scale appreciation question. The sample size of this survey is 3.585.000. This survey was taken by 151 respondents. The results are analyzed under the form of ranking, categorizing and generalizations. The questionnaire was voluntary and lasted around 7 minutes. The questionnaire and the results can be found in the annexes.

Secondary data from Environmental State of Wallonia were also used to contrast and challenge the results of the survey. (Environmental State of Wallonia, 2018)

2.2 Results of interview

After going through the literature, interviewing a few people in the professional world was a relevant way to have another vision of the SSCM. After going through the literature, interviewing a few people in the professional world was a relevant way to have another vision of the SSCM implication and its impact. For those interviews, we had the opportunity to interview:

- The founder of a sustainable funds “Scaleup” but also one of the Co-Founders of Färm (Cooperative organic Food shop) Louvain-La-Neuve Olivier Van Cauwelaert.

- The director of CSR department and Quality sustainable development at Carrefour (one of the largest general distributor in Belgium), Pascal Léglise.
The director of Vaccines Distribution at GSK, formerly director of global operation procurement at GSK Global, Pascal Reyntjens. (GSK is generally known for its vaccines but it has also business units in consumer healthcare and pharmaceutical products).
- The manager at the cooperative Macavrac. (Bulk local food shop in Wavre. Social enterprise), Florence Lanzi who is also currently writing a thesis on the sustainability in the food market.

The objective of those interviews was to point out what were the barriers, the benefits and the drivers of the SSCM implementation within their sector. The final question of the interviews concerned the competitive advantage aspects in their sector. You can find in the annexes the questions that were asked during the interviews and also a brief summary of their answers.

A) The main challenges in the food sector according to the interviewees are:

Pascal Léglise explained that the most important challenge is to work on the implicit expectations of the clients with the client being the main driver of the food economy, you have to work on guessing what will be his future explicit demand. At the same time, you must educate and guide the customers toward more responsible products. It's a question of balance between the offer and the demand.

The challenge and the mission for Macavrac and Färm is to make local and organic products available for everyone in term of proximity but also in terms of price. The goal is to provide a large set of quality products while respecting their objectives.

According to Florence Lanzi for Macavrac, it's important to educate the client that the benefits of eating local quality products is not only good for the consumer health in a direct way, but also in an indirect way; by protecting the environment.

B) The main drivers according to the interviewees are:

The governmental policies and the pressure from the customers. Macavrac manager, Florence Lanzi explained that Macavrac started as an action part of Citizen sustainable plan organized by the township for example.

Pascal Léglise highlighted the importance of the top-level management in the process of the dietary transition and all the actions related at Carrefour. However, the main drivers remain the shareholder and above all, the customers.

For the consumer healthcare unit of GSK, they explained that the audits and the governmental pressure are getting more important. The smaller responsible distributor explained that there is no alternative than turning the food sector greener.

C) The main barriers according to the interviewees are :

In the food industry:

The director of Carrefour discussed the fact that people are interested in the sustainability, they can see it in the growth of the sale of their products however, the demand is still not large enough to fit the possible offer. However, the producers on their side consider the demand to be too low to change their business orientation. Therefore, they must consider the potential logistics issues of working with multiple producers for the same product.

The smaller retailer, who is looking for seasonal product and for a more circular economy, points out the fact that they can't source all the goods that the customers are looking for all the year. The small and larger retailers claim that the price is still a key factor. All the consumers are not ready yet to pay a higher price. Indeed, they don't see the direct benefits that they can get from the sustainable products.

In the vaccines and consumer healthcare company:

In the sector of GSK being more technical, Pascal Reyntjens highlighted the fact that changing of producer or of way of transport can require much efforts in term of qualification of new materials etc. It can also represent a high cost for the company to certify new suppliers.

Mr Reyntjens also explained when you are in a market under constraint, meaning that the demand is higher than what you can produce, all of the resources that you don't allow to the production is necessarily a loss of sales. This can be the case in other market of the consumer goods sector.

D) What can be the benefits?

All the interviewees agreed with the literature saying that those SBP can definitely increase your brand equity. The brand equity can afterward bring an extra willingness of the buyer if we refer to the theory of Porter. SSCM can partially protect the firm reputational damages. Moreover SSCM tends to work in a way that does not go against the and therefore can avoid to be fined. Olivier Van Cauwelaert took the example of Monsanto who is forced to pay billions of dollars of fine. Another benefit is that the market of biological products is growing fast. Even if bio doesn't necessarily mean sustainable, we can see that we are moving in the right direction and that people are getting more and more sensitized and therefore there is an opportunity of growth. The talent recruitment is also an aspect that was highlighted by two interviewees. The younger generation freshly graduates are definitely more exposed to the problematic of the sustainability and they have a better vision of more sustainable company, increasing the chance of working for them. According to Pascal Reyntjens, from GSK, the sustainable approach forces the company to challenge themselves everyday and to get better every day.

E) Additional discussions:

Pascal Léglise, for Carrefour, emphasized the fact that every SC has different genetics and objectives. What can be done in term of sustainability is accordingly different. All the companies can not work on the same aspect to reduce for example their carbon emissions. For instance, Färm as an organic food shop as not the same objectives than Macavrac in term of sustainability and SBP. One might only source local products without packaging while the other might try to minimize the food miles of its organic products.

Some also discussed the subject if whether or not SSCM could bring a competitive advantage. Pascal Léglise from Carrefour wanted to highlight the fact that the innovation is key in this context. Therefore, the companies must be proactive against their competitors to innovate

in the field of sustainability. He stressed the fact that, if you start when the governmental regulations or pressure arrive, it's too late to stand out of the market.

Pascal Reyntjens, for GSK refers to the fact that there must be a balance between the social purpose of GSK who is producing vaccines and the negative effect of its productions. If less vaccines are produced, more people will be sick. This question of trade-off can be discussed in the food industry as well. People need to eat, that's a basic requirement. However, if the food gets more expensive, it might become a problem for people to access to this basic requirement

2.3 Market Survey Results

2.3.1 Sample

In total, this study was taken by 151 volunteer participants. Here is a breakdown of the respondents according to their age and gender. We observe that the ratio M/F is proportional but the distribution of the age of the population is not represented proportionally.

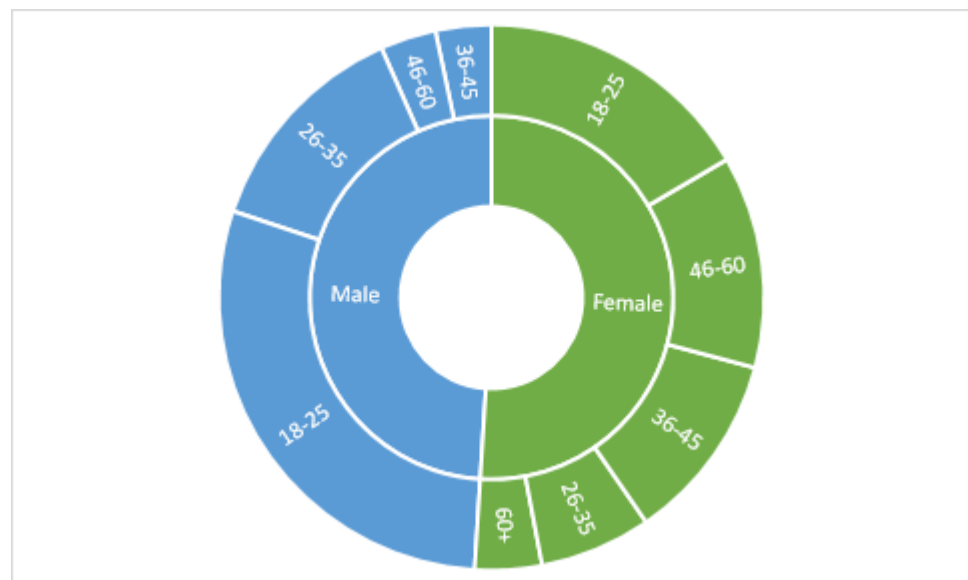


Figure 11. Breakdown of the sample by gender and age

To classify the respondents, they were also asked to communicate their level of education; 13% of the respondents have a high school degree and 87% have a higher education level. This study was not only reserved to the customers, it was open for people aged 18-25 where most still live at their parent's house. The result is that 8% of our sample don't buy the product themselves. However, they are the customers of tomorrow and their opinion matters for this survey.

The consumers have a high tendency to go to the large distributors retailing shops:

- 80% of the sample goes to hypermarket for their groceries
- 50% of the sample goes to smaller version of the main distributors
- 30% of the sample goes to organic food shop
- 20% of the sample goes to bulk shop or to the market
-

Official data around consumption and production of organical products exposes that:

- 36% of organic products are bought in the general distribution
- 30% in more sustainable shops
- 7% at the hard discount shops
- 5% at the hypermarkets
- 4% at the bakery
- 3% at the farm
- 2% out the market

The reasons for the choice of the type of shops have been ranked on a scale from 1-5 without stating the sustainability of the product in the criteria.

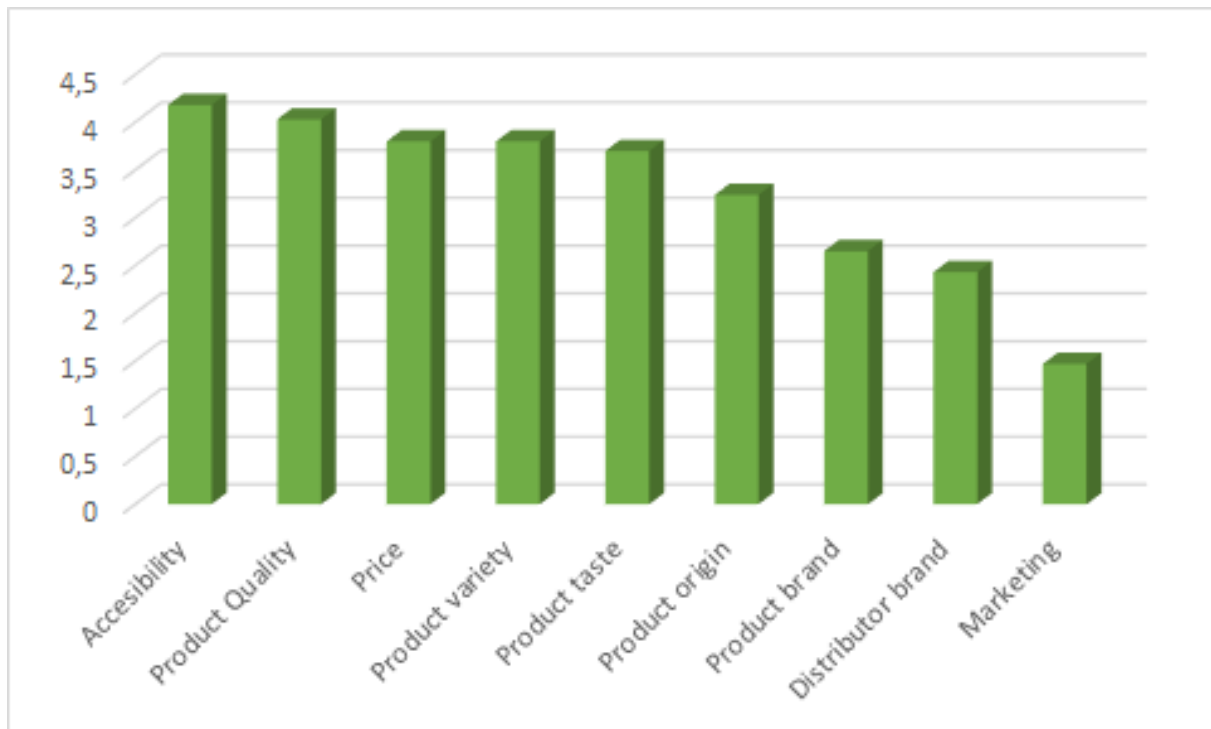


Figure 12. Ranking of most determinant attributes for a consumer's distributor choice.

Unexpectedly, 81.3% of the consumers say that they buy organic products. If we look at the percentage of biological products, people report that 31.7% of the alimentary products they buy are biological which appears to be high compared to the numbers given by the official data who reports 4%.

The growing organic trend is supported by the result of survey. Indeed, only 20% say that they didn't see their organic product consumption grow. More than 55% of the sample say they saw their biological products basket grow. The main contribution to this increase of volume is the sales of vegetables and fruit and potatoes.

2.3.2 Sustainability in the food sector

According to the results, the main reason is the increase of interest for the organic products is health related. Afterward, around one person out of four says that's it because of their entourage influence, the growing accessibility of the products, the evolution of the price and for the environment.

Next question, 90% of the respondents say that feel concerned about the sustainability issue. We obtain an average 4.45 out of 5. This average is nearby equal for the entire sample.

In contrast, when people are asked if they pay attention to the sustainability of the product, they buy on a scale of 1 to 5, we obtain an average of 3.6. Therefore, we can see that in the context of the purchasing food, the concern of the environment and the social welfare is definitely not the only factor.

First, we evaluated the expectations of the customers in term of sustainability of the product called bio. Here is a ranking of the most important features for the customers:

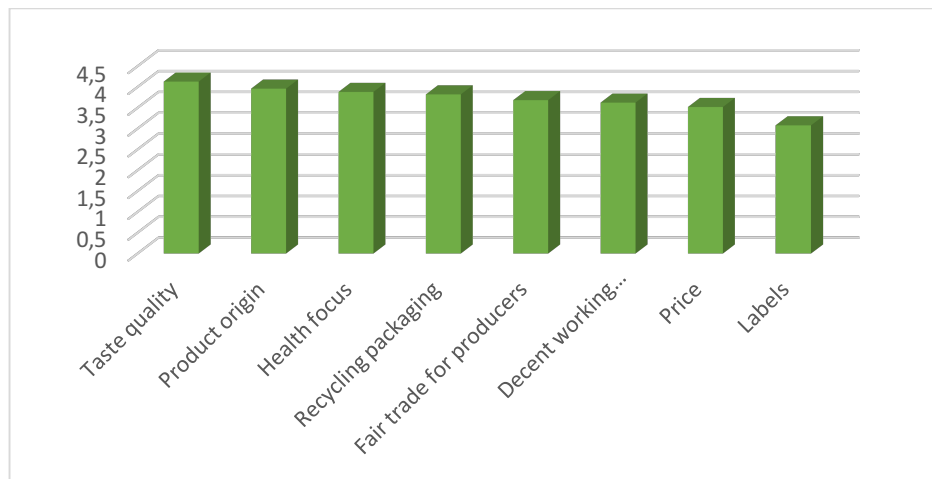


Figure 13. Ranking of the most important attributes for an organic product

We observe that the taste of the products and the features concerning the health of the consumers dominates the top 3 with the origin of the product. The recycling packaging stands right after the top 3 closely by the social concerns for the consumers. Therefore, we can see that when buying more ecofriendly and socially responsible products, the price come after. An interesting fact is that people seems to accord little importance to the labels.

We asked in the survey, if the customers could go eventually go to a shop to find 1 or 2 specific shops. The average answer is 3.3 out of 5. Almost 30 percent said that were neither for nor against this proposition. What's interesting here is that 49 percent answered positively. This creates an opportunity to gain new clients.

Hereafter, the figure 13 exposes what are the factors that creates a feeling of loyalty toward a distributor.

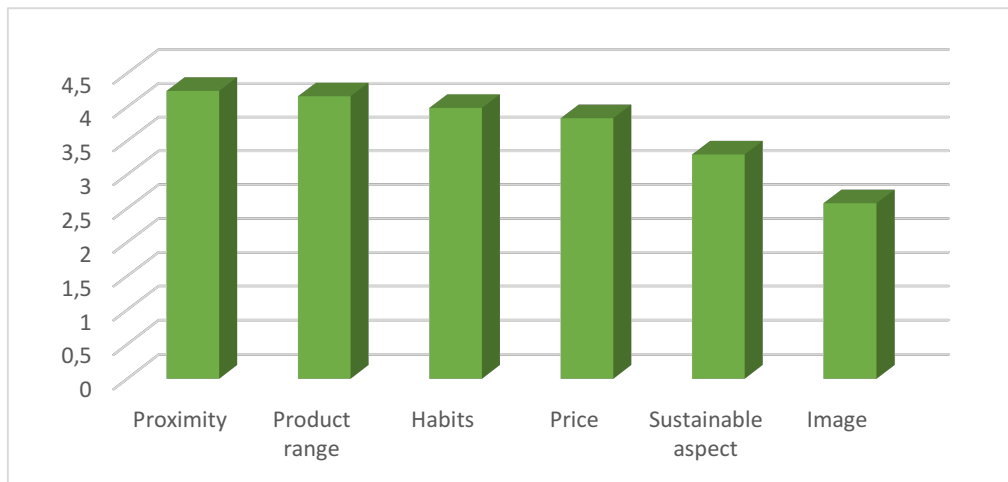


Figure 13. Ranking of the factors creating a feeling of loyalty towards a food shop

The proximity of a shop remains the number one criterion for a consumer followed by its the range of products of the shop. The habits and the price follow respectively and then the sustainable image and then the brand equity itself.

When the interviewees are asked if they know about sustainable investment and development from the distributors, the answers are mixed; and the average is 2.76 out of 5 showing that in reality they are not often aware of the efforts that are put in.

We asked them what the principal channel of information about these SBP and here was is the result.

- Reading the labels 32%
- Acquaintances, friends and family 20%
- Media 13%
- Personal research 13%
- Multiple methods of research 3%
- Not looking for information 1%

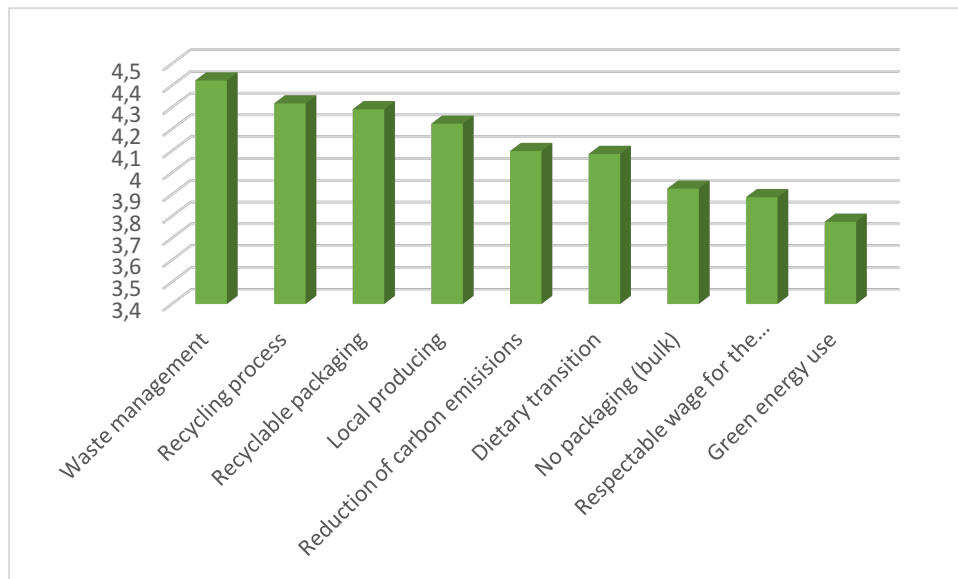


Figure 14. Ranking of the most important attribute for an organic product

The first lesson out of this graph is that all of the following reasons are evaluated as important challenges, therefore the consumer is aware of the current environmental and social issues. However, he tends to respond more importantly once we show those problems explicitly to him. The waste management, the recycling process and the local production are above 4.2 out of 5. The social concerns (fairness concern and dietary transition) are the lowest consideration.

The customers are asked if those sustainable business practices can improve their vision of a company and the average result is 4.1 out of 5.

Of one of the characteristics of the brand equity as a competitive advantage, assuming that customer is ready to pay more for a certain product. Therefore, the customer is asked how much more he was ready to pay for a more sustainable product and here is the answer.



Figure 15. Comparison between level of increase of the price and the percentage of the sample willing to for that increase.

Three out of four people are ready to pay between 10 to 20 percent extra compared to less sustainable products.

Next, more than 75 percent of the sample believes that the large distributors are able to provide more sustainable products. In this context they were asked which distributors were the most sustainable according to their knowledge. This question was to measure if the people had already an opinion on this subject even if there is no objective ranking.

In the earlier discussion, we might have confused a bit the customer since we are discussing organic and sustainable products. Therefore, we asked them a question to have an idea of their understanding.

On the other hand, this trend goes opposite way when they are asked if the organic retailer can provide more sustainable products.

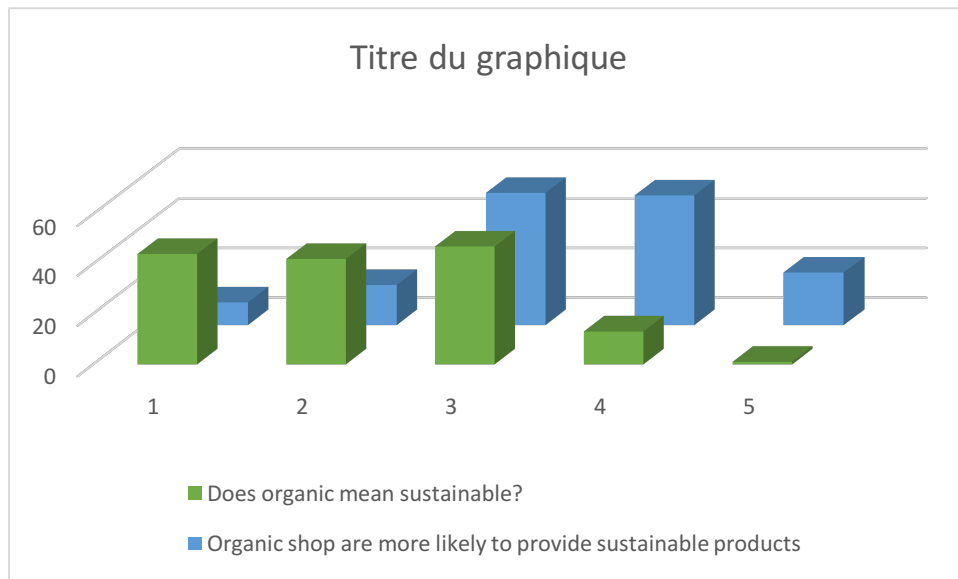


Figure16. Comparison between the potential sustainability of the organic products and the ability of organic shop to provide sustainable products.

Concerning the local distribution, almost 90 percent of the consumers say that they frequent more local shops (Cooperative, Organic shop, market.) which is significantly more than the previous results obtained in the first question.

The reason for those who don't is essentially, the price and the time it takes to visit too many stores. However, 90% of the interviewees think that this kind of economy has a bright future.

The first part of this survey was related to the hypothesis H1, H2A and H3A. Next, the influence of the brand equity and the SSCM on the talent recruitment of a food company was measured. They were asked to consider that they were working in the food sector but this assumption is significantly weak and therefore the results might be more general reflection on the existing links between the talent recruitment and the sustainability within a company.

2.3.3 Sustainability impact on talent acquisition

When asked if the brand of the company they are working for is important, 88 percent of the sample answer that it strongly matters to them. The result is equal when they are asked if their values have an impact on their choices. We observe then that the values and the image of the company have a high level of importance in their career choices.

Going in the same idea, 90 percent assume that their work would be better quality if they were working in an environment they love. They also expect the length of their career within a sustainable to be longer. A result of 4.3 out of 5 was obtained.

Next, 85 percent of the sample state that they would be interested in working in a more sustainable company. We wanted to test this assumption with a subjective question concerning the salary and if their answer would be the same if the wage were lower. The result has an aspect of normal distribution which tends on the right. The average answer is 3.2

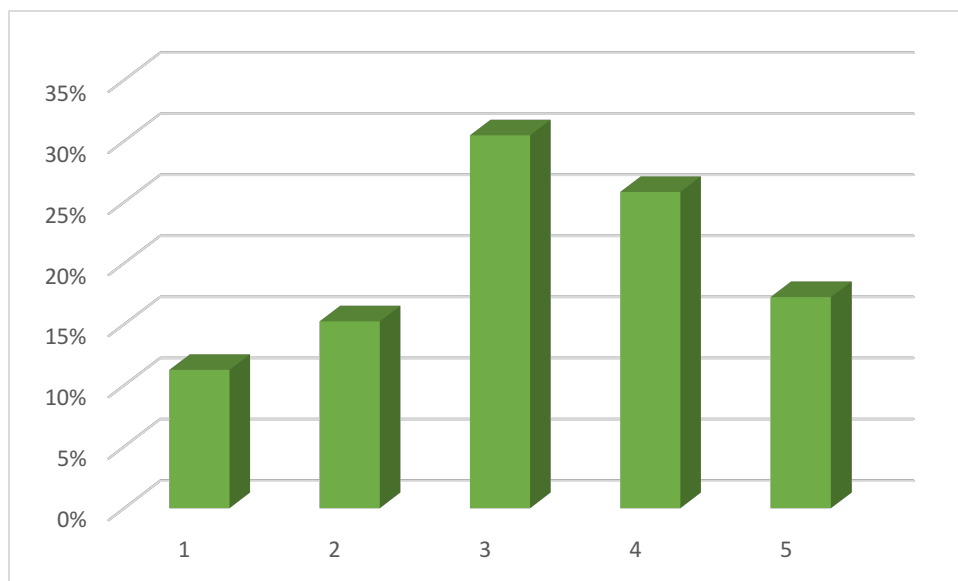


Figure 17. Showing the percentage of people that would still work if the wage was lower

2.4 Confrontation of theoretical Hypotheses and Market Survey

H1: SSCM can increase the brand equity of a company via SBP implementation.

Mefford (2011) and Wintston and Esty (2009) stated that green and social actions give credit to the brand of a company. When asked to the interviewees which were the main benefits of implementing SSCM, they mentioned the advantage of improving their image. We measured with our survey the influence of sustainability business practices on the image of the company and therefore we can confirm that this hypothesis is true in the Waloon environment (see Q16 results). This hypothesis can directly be justified for the organic food shop. Indeed, the customers is positively convinced that the products from organic shop are more sustainable.

However, the large distributors have to provide more efforts. The customers are aware of the importance of the challenges that food companies face nowadays (see Q15 results) but they don't have enough information about the campaigns and actions that are taken by the large distributors. (see Q13 results) However, they believe that the large distributors are able to provide more sustainable products (see Q18 results). To sensitize positively the customers, the companies should communicate intensively on the subjects with which they are concerned.

Schäfer, Jaeger-Erben and Bamberg,(2011) and Léglise Pascal, from Carrefour, stated that one of the challenge was to educate the clients towards a nutrition transition more sustainable. The production and the consumption need to get more sustainable, not only the food SC. However, the customers must be ready and receptive to the signals sent by the companies in order to maximize the gain of brand equity.

H2A: Brand equity can influence the perception of the customers on its products and increase the revenue and the sales of a company.

It appears in the results of the survey that the name of the shop come in 7th position when it comes to the reason of the choice of distributors. The brand of the products itself come just before in 6th position. It shows us that the choice of a hypermarket or the local organic is not due to their names or the brand of the products they sell. The diversity and the quality of the products are more valuable according to the customers.

However, 20 percent of the respondents claims to give a lot of importance to the brand of the distributor where they do their groceries. This sample, however, is also very sensitive to the product with an average of .4 out of 5 which is 10 percent higher than the average of the entire sample. A misunderstanding of the customer could be the explanation.

It was shown by the Q12 that the image of shop is ranked last in the factors that create loyalty. The name itself is not sufficient to influence the customers. The habits and the accessibility are more powerful criteria according to the results.

However, the brand equity is sometimes not perceived by the customer himself as a strong factor influencing the loyalty. Therefore, we cannot conclude any strong and direct link between the name of the distributor and a possible increase of the revenue because of the brand image in the food sector in the Walloon environment.

H2B: Brand equity can influence the choice of talents towards their career choice.

The results from the survey reports that young adults from 18 to 25 are highly concerned by the image of the company for their career choice. The average for this category is 4.2 out of 5. (See Q26 results). It was also confirmed by Pascal Reyntjens that the brand image is helpful in the talent recruitment. The results show that the values of the sample used (18-25) earlier is highly influential in its choice of careers: 4.3 out of 5. (see Q27 results)

Additionally, 90 percent of the respondents claims that the quality of their work would be enhanced if working for a company of which they are proud of. Last, most of the population considers that its career length would be longer in a sustainable organization. (See Q28 and Q30 results)

H3A: SSCM implementation can influence can increase the company revenue via the growth of the sales and the price of the products of a company.

Sustainable Business Practices such as local sourcing, recycled packaging, fair wage for the suppliers, waste management can increase the willingness to pay of the consumers as observed in the survey (See Q17 results). Consumers are starting to realize all the externalities caused by their food choices. Organic food market is growing every year because of the demand of the consumers. The main reasons of the increase of organic product is about health and the ecology. Sustainable products are often better considered by the health-concerned population which reinforce this hypothesis. (Nie and Zepeda, 2011; Schäfler and al., 2011 and Ozimek and Zakowska-Biemans, 2011)

On the other hand, an extreme vision of SSCM can be harmful for the company. In the case where they can't provide a large enough set of products, they can lose market share because customers are not ready yet to consume only locally and seasonally. This hypothesis was brought by Florence Lanzi, manager of Macavrac, a bulk shop and is confirmed by the results of the question that concern the importance of the range of products in the shops. (See Q3 results)

H3B: SSCM has direct impact on the talent recruitment process.

First, 85 percent of the respondents say that they would rather work in a sustainable company. The average for the young or future graduates is similar to the entire sample. The

young graduates have no special attraction for more sustainable company. On the other hand, the willingness of the young graduates to work for a more sustainable company is stronger than the rest of the sample, since we tested it in Q31. Respectively 3.6 against 3.1.

Therefore, we cannot conclude that a strong link exists between the SBP implementation and the improvement of the talent acquisition.

2.5 Discussions

Customer opinion is seen as the most important driver of the change in the food industry. (Carter and Dresner, 2001; Bjorklund, 2011), When companies reorganize their SC, they are trying to customize it with a more social and ecofriendly view in order to gain some benefits as explained earlier. Internal factors might be improved by the implementation of SSCM practices such as, efficiency, innovation waste and emissions reduction etc. However, the demand of the customer is the main source of revenue. Therefore, their view on the SSCM practices implementation is determinant to define if the SBP implementation can be a competitive advantage under the form of the differentiation.

Pascal Léglise (CSR director Carrefour) stated that the challenge was to match the demand of the clients and the offer available in term of sustainable products. If we observe the current situation, there are opportunities: Growing market, no leaders. And threats: many competitors, barrier of cost. Indeed, a lot of companies in the food sector are trying to commercialize more sustainable brands or to turn its own-brand products green and more responsible to get its share of this growing trend. These practices can be observed in the Sustainable in the sustainable report of the Belgian distributors. (Carrefour, Colruyt, Delhaize 2018)

The reason why the distributors are trying to get their share of this market is simple. The survey's result exposes that consumer is ready to pay more for sustainable products. (See Q17 results) This can result in an advantage if the company succeed in providing sustainable products of the same quality or of a better quality without increasing the cost of goods sold. That quality of food can be enhanced by the implementation of SBP. (Zach Conrad & Al, 2018)

SSCM can influence the general level of sustainability of a company and this sustainability aspect is very positive in the talent equation. Studies show that sustainability is linked with talent recruitment and retention, employee engagement and productivity improve

but expectations of the employees grow as well with potential tensions. The image of a company and the values of the talent is highly important in future professional choice. (see Q26&Q27). Therefore, we can conclude that the sustainability changes within a company have a positive effect on brand equity and that brand equity positively influence the choice of future workers.

The SSCM practices can improve the brand equity of a food company. However, this level of direct impact on the choice of customers is lowered. The result of the survey showed that few are the people that know about the sustainability project of the firms. The risk is even higher for operational actions linked to SC. However, we could assume that a company which is innovating in term of SSCM could attract new talented employees already interested in the subject.

It remains complex to measure the real cost of sustainability, due to a privacy of that information. However, Macavrac exposed in the interview that they are able to sell locally grown product for the same price than the organic food sold by Carrefour for example. This example shows that it's possible at smaller level to provide some sustainable products. An extreme SSCM will limit the set of products available for the clients.

The results of Q16 shows that the customers are ready to go to a specific shop for a more sustainable product. This is counterbalanced though, by the fact that the respondents are reluctant to the possibility of visiting too many places to shop. The image of a brand is therefore not what will make the customer loyal, but it can be the factor that will make him visit a new store. The products sold, the accessibility and the price are factors that will create loyalty according to the result of Q12.

The health and sustainable aspect in the food industry have been discussed but the implication of health aspect in the SSCM is less popular. In our case, this is the number one reason of the customer to buy more sustainable products. (see Q7 results) The mission and objectives of the large- and small-scale distributors often contains this topic using it as a marketing argument. (Farm, Carrefour, BIOC, 2019) The customers pay attention to the direct impact of the product on their health and tends to forget how the externalities of these products can hurt their health ultimately.

Today, the distributors have their own brand where they have power on the suppliers of the products, but they don't have the same power of decision with the brand they are working with. The brand equity of the products themselves is higher than the brand equity of the distributor's eye .(see Q12 results) Banning some brands that are not sustainable could significantly harm

the distributors. They could lose customers to its competitors this way. In this way, the SSCM can be risky. The influence that distributors have on food company and the way around in the sustainable field would be interesting in the further research.

A topic that should also require further research is the difference between organic and biologic products with a customer view. When they are asked, they answer that they are aware that organic is not necessarily sustainable. There is a mix of those two concepts in the sustainable food industry nowadays. Unfortunately, mass organic culture is not necessarily better for the environment and social conditions.

If distributors and smaller retailers desire to take more advantage of the SSCM benefits, companies will have to work together on the education of the clients, according to Pascal Léglise. Individual efforts of marketing and education are less effective than an overall contribution.

2.6 Conclusion

The objective of this study was to determine if SSCM strategy could lead to a potential competitive advantage. The source of competitive advantage according to the natural resource-based view competitive advantage (CA) for the firms are lower cost, reputation and legitimacy, future position, and embedded innovation. The information on the cost production of products is private data that is complex to link with sustainable practices. The possible cost reduction will be different depending on the situation of a firm.

The reflection after the literature review on the SSCM practices in the food industry guide to focus on the brand equity that can be earned from SBP implementations. With the consumer being the real engine of this economy, we measured his reactions and influence on the food market were measured. From this first objective, we could also derive the influence of Brand equity on the talent recruitment and management which is in link with another CA: embedded innovation.

The result of the survey indicates that SSCM increase the brand equity of a firm. However, we can't confirm that the image of a distributor is a factor that has a high influence on the demand of the customers. It has to be developed with different factors to create a real

CA as shown in the result of the survey on the loyalty. On the other hand, more sustainable products have a direct impact on the willingness of the customer to pay an extra price. In contrast, an extreme implementation of SSCM can be detrimental for the distributor.

On the other hand, the willingness of food companies to improve in the sustainability field is not new. They are already competing on this stage and if they all use the same SBP, those will not create a competitive advantage in itself. The innovation is key in this context and the talent management can be really helpful in this case. The result of the survey showed that brand equity is an important factor that influences the choice of the future employees. In contrast, the results of the survey can't conclude that there is a direct strong link between the talent acquisition and the SSCM. The innovation and the anticipation in the field of sustainability can be a real source of competitive advantage.

Managerial implications

SSCM can provide benefits for different scale of firms but it can be source of problems as well. The western population is facing a slow transition towards a more sustainable way of eating. (Solomon 2014). If firms want to take advantage of it, they have to anticipate the future needs of customers and that's the real challenge. Innovation and anticipation will be key to outperform competitors in the field of sustainability. If we take a look at the problem with a scarcity resource approach, we understand that being efficient about the way we use those resources will make a difference in the future. Since the transition is slow, the change towards SSCM strategy should also be so. Most of the consumers are not ready to change drastically its habits. The customers still need to be educated in the right direction.

Fixing objectives and asking for help is the best way to start the process. SSCM has no precise guidance, it's a mindset that can be translated into tangible actions. Managers must understand that according to their environment, business activities and size, the actions to take will be different.

Further reasearch

A study case concerning the Walloon customer opinion on the SSCM impact was brought in this master thesis but no additional theory was raised. However, it points certain aspects that could be developed in future research:

1. The negatives consequences of the SSCM strategy could be deep dived. The literature discuss the barriers and the potential tensions but however, they don't discuss the SSCM practices that can directly hurt the business.
2. How to balance the shareholders and financial opinion versus the green and social approach for example? They're could be more discussions on the price of the trade-off if necessary, between different dimensions of the sustainability.
3. Health is a significant factor in the decision-making process of the customers. Some campaigns as the Nutriscore can help in their choice of products but no precise data linking the SSCM and the health-related quality of the product.
4. The influence of the distributors on their branded supplier in term of sustainability and vice versa. What's the power of influence of the distributors on the food-brands? Who has the last word in the discussion when it comes to sustainability?

Critics

Sustainability definition is large, maybe too large, so is Supply Chain. The mix of both can refer to a large set of subjects. It gives us the feeling to explore the theory without pushing far enough. If we could go back, we would have defined a clearer problematic with a specific sustainable business practice for example. The definition of competitive advantage tends to describe a preferential position where the final result will be a better financial result therefore linking this vision with a Triple Bottom Line or sustainable approach is tricky. Even if the links between the financial or operational results of a company and the SSCM implementation are complex to correlate, a deeper analysis could have been an asset in this study. The influence of the distributors on their branded supplier in term of sustainability and vice versa. What's the power of influence of the distributors on the food-brands? Who has the last word in the discussion when it comes to sustainability? The definition of competitive advantage tends to describe a preferential position where the final result will be a better financial result therefore linking this vision with a Triple Bottom Line or sustainable approach is tricky. Even if the links between the financial or operational results of a company and the SSCM implementation are complex to correlate, a deeper analysis could have been an asset in this study.

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PART IV: APPENDICES

APPENDIX 1: Sustainable development Goals

This initiative started at Rio during the Earth Summit in 1992 where more than 178 countries where reunited and agreed on the implementation of an agenda which was a plan to build a global agreement for sustainable development for 2015. It was followed by the unanimous (by all the UN country members) acceptance of the Millenium Development Goals.

In January 2015 the General Assembly started building the 2030 Agenda for Sustainable development with the famous 17 Sustainable Development Goals as key objectives. They finally validated and adopted it at the UN sustainable Development Summit in September 2015.

“The Sustainable Development Goals are a call for action by all countries – poor, rich and middle-income – to promote prosperity while protecting the planet. They recognize that ending poverty must go hand-in-hand with strategies that build economic growth and address a range of social needs including education, health, social protection, and job opportunities, while tackling climate change and environmental protection.”¹

This initiative as set milestones with its 17 objectives such as Clean Water and Sanitation, Reduced inequalities but they also created 169 clear objectives divided by categories. For achieve those, they expect to have the support from the governments and their legal policies but they also count on the companies to improve their sustainability. They offer tools and guidance to help firm to start their journey in a more sustainable way. They are often found in the Sustainability Report.

¹ <https://www.un.org/sustainabledevelopment/sustainable-development-goals/>

APPENDIX 2: Tension as a possible barrier

- Economic tensions:

They occur usually due to operating and opportunity cost but also to the higher investment linked with sustainable development. The cost allocate to the budget for sustainability cause will postpone or even cancel other projects. Another problem might be linked to the performance expected by the customer which will be different via a greener and social process. The quality or the maintenance level might be higher, creating a loss of functionality for the customer. The price might be higher without presenting a specific benefit for the customer.

- Structural tensions

There is a possible issue linked to the fact of the sustainable resource are produced by specific suppliers. Therefore, if there is only one supplier able to produce a needed product, this sole stakeholder might gain too much power within the supply chain. This might to a abusive power position and higher cost.

The analysis and monitoring of a broader network requires resources that are sometimes not available. The measurement is sometimes different and it can be very time consuming for the company tko keep an eye on the whole value chain.

- Psychological tensions:

This tension can be linked to the feeling and emotions that can occurs for companies implementing Sustainable business practices. The stress provoked by the situation where we can't not properly calculate the return of a sustainable investment is part of them. There are also political risks that can influence the situations. New regulation on new products can appear. The subsidies and the taxation might evolve along the years. This case appears concerning the utilization of bio-fuel etc

Some firms also manifested the risks of having to disclose confidential or embarrassing information for the final customers. It can go both way in the supply chain, from the focal companies to the suppliers or the other way around. When companies try to implement SBP, they try to foresee the impacts. It can also sometimes show the truth about some CSR policy that are more posturing than impacting.

- Behavioral tensions:

Implementation of SBP implies an additional workload and training for the companies who have to provide additional reports and activity analysis. There might be internal resistance within the organization itself. Some employees feel like they were forced to measure indicators that didn't really were linked with their performance or business activities.

Hopefully those barriers can be minimized as well as the risks linked to the implementation of sustainability goals and practices.

APPENDIX 3 : Questionnaire

Introduction

- Pouvez- vous me parler de votre parcours et de votre boîte?
- Comment avez-vous vu votre boîte et sa vision sur la durabilité changer ?

Drivers

- Quels sont les principaux drivers selon vous de ce changement vers le durable
- On parle beaucoup de la pression des parties prenantes de la supply chain, quels sont les plus important selon vous et lesquels ont le plus d'impact ?

Quelles sont les barrières du SSCM

- De manière générale, Quelles sont les barrières au durable selon vous ? Plus spécifiquement dans le cas de l'alimentaire ?

Implementation de SBP

- Ou votre compagnie met-elle ses priorités ?
- Quels types d'actions avez-vous mis en place dans les dernières années ?

Quels sont les bénéfices du SSCM

- Quels sont les bénéfices que vous retirez des actions que vous mettez en place et comment les mesurez-vous ?
- Quels sont vos critères de performances en matière de durabilité ?
- Comment arrivez-vous à balancer les 3 dimensions de la durabilité ?

Discussions générales

- Comment vos concurrents avancent-ils dans le domaine du durable ? Est-ce que cela a de l'importance pour vous ?
- Quelles sont les associations et Ngo les plus importantes et pertinentes ?
- Quelles sont selon vous les sujets les plus importants à traiter dans le futur ?

APPENDIX 4 : Interviews'summary

A) GSK sur sustainable supply chain management de manière durable

J : J'aimerais bien voir en fait si c'est possible de le considérer comme un avantage compétitif du coup j'ai une revue de littérature sur les barrières les drivers sur les avantages. J'ai contacté des plus petites entreprises comme farm, macavrac qui sont des plus petites distributions plutôt locales mais aussi carrefour et gsk qui sont des plus grosses boites pour avoir leur avis sur le sujet. Pour savoir à leur niveau ce qui pousse à la gouvernance vers du sustainable -c'est quoi qui peut en ressortir ... si en plus il peut y avoir des avantages environnementaux et sociaux... et s'il ressort d'autres paramètres pour la mise en place. Du coup, on peut commencer par ta fonction et ton parcours :

P : Je sorti de l'UCL, je suis allé quelques mois en Angleterre, puis chez GSK sur site industriel en projets et en maintenance. Ensuite je suis passé aux Achats, d'abord des achats techniques puis j'ai progressivement acquis les compétences en achats avec formations diverses en achats pour arriver à avoir de plus en plus responsabilités au niveau du site puis au niveau global.

Ensuite, j'ai eu l'opportunité de rejoindre la partie Vaccins et dans la partie vaccins je me suis occupé des achats très techniques, de driver la partie investissements au moment de l'expansion de GSK, très important pour GSK car il y a un budget d'1 milliard par an étendu sur les trois continents. Après 4-5ans là, on m'a demandé de m'occuper d'une matière première car pour toutes les usines qui avaient démarré, il fallait faire en sorte qu'elles soient approvisionnées là-bas. Et je me suis aussi occupé de la partie qualité que de la partie technique

Cette partie, ce parcours a été super intéressant car j'ai pu toucher à beaucoup de choses. J'ai pu observer tous les process et grâce à cela j'ai pu avoir une vue très globale. Puis je suis passé à autre chose, j'ai exploré ... et j'ai me suis intéressé à la distribution qui était très locale à l'époque et j'ai fait en sorte de professionnaliser le département de le faire grandir. Et cette partie a pris 4 ans.

J : Dans les 4 dernières années, est-ce que tu as constaté dans la vision de GSK un changement par rapport au durable ?

P : oui oui, une volonté mais grosse machine à faire bouger ... c'est très très lourd car tout changement doit être validité car c'est pour la sécurité du patient donc chaque étape doit être

validée est très lourde ; Par exemple, pour les matières premières si tu veux introduire une matière plus durable ou des achats plus durables, c'est pas simple vu tous les checks et validations à faire. Cela peut avoir aussi un impact sur la santé mondiale car GSK est le principal fournisseur de vaccins. Si on ne sait pas fournir le même nombre de vaccins il y aura plus de malades au niveau mondial.

Impact sur capacité donc cela a un impact financier direct car tu es dans un environnement contraint c'est-à-dire que ton offre est inférieure à la demande et tu ne sais pas fournir tout le marché ; tu es contraint par ta capacité de production Si tu prends des capacités pour être plus durable cela veut dire que tu réduits ton chiffre d'affaire directement.

Donc oui GSK va agir sur le durable comme par exemple au niveau de l'énergie ; on a installé des panneaux solaires, puis on a mis en place divers projets et awards à travers le groupe pour économiser de l'énergie pour être plus « sustainable ».

Donc oui GSK a envie d'aller dans cette direction mais dans la mise place et l'implémentation, c'est beaucoup plus difficile à mettre en place car c'est un choix à faire entre produire moins de doses et donc impact sur santé mondiale et aussi impact financier direct.

J : pourquoi GSK a envie d'aller dans cette direction de sustainable ? Etes-vous poussé par les clients ? Y-a-t-il une raison politique ?

P : non pas pour des raisons politiques mais pour l'image de marque et pour avoir des clients. Les nouvelles générations sont de plus en plus sensibles à ce paramètre. Et donc GSK sait que c'est dans son intérêt de faire attention à la partie environnement; GSK veut une empreinte sociale beaucoup plus importante que ce qu'ils avaient dans le passé. Dans le passé, c'était beaucoup plus la partie profit ; GSK fait de plus en plus attention à cette partie environnement pour son image de marque et je pense qu'il y a derrière un intérêt commercial car derrière le profit, l'affaire change.

J : Sais-tu si GSK a des objectifs particuliers ?

P : oui oui ; Il y a une politique de sustainability au niveau du groupe et qui cascade à travers le monde pour donner des ambitions. Donner des ambitions c'est par exemple être neutre pour 2030-2040 ; pour ne plus avoir de rejet ; impact sur consommation d'eau et d'énergie, sur la

neutralité de la consommation d'énergie ainsi que sur les matières achetées, tout un programme est fait. GSK pourrait être plus efficient, ce n'est pas encore optimal. Il y a une attention particulière à y apporter.

J : Quand tu travaillais au niveau des achats, mettaient-ils en place des éléments comme green chart, ethical sourcing, suppliers selection criteria..... ?

P : oui il y avait une Charte mais je ne me souviens pas d'avoir vu dans les contrats pour ma partie. C'est-à-dire les achats de matières premières avec les fournisseurs, je ne pense pas y avoir vu de partie sur la sustainability ; c'était il y a 4 ans cela a peut-être évolué depuis.

J : Selon toi , pour société comme GSK, quels sont les plus gros efforts à réaliser ? Etant donné que les ressources sont contraintes, où devraient-ils investir ?

P : ce serait dans les matières premières .. les œufs ! on commande entre 500.000 et 600.000 œufs par an pour les vaccins. Et dans le processus de fabrication des vaccins pourquoi des œufs, pour pouvoir développer le virus dans l'embryon de l'œuf puis on va extraire l'embryon et le reste est jeté ! Et à côté de cela il y aussi le fait que cette production ce n'est qu'une partie de l'année mais les poules, elles, pondent toute l'année donc pour ne pas dérégler le marché, tous les œufs qu'elles pondent pendant cette autre partie de l'année et bien ils sont jetés aussi.

Donc on doit trouver une solution, un processus différent car cela a un impact important dans notre empreinte carbone. Même chose avec les « disposables ». Toutes les poches et tous les supports de production anticorps commandés qui sont du plastique, on les jette ; ce sont des plastiques avec des produits biologiques, ils sont envoyés à l'incinérateur. C'est très difficile à changer cette partie. Ils doivent encore s'y pencher.

Ils sortent beaucoup d'eau ; ils ont des boucles d'eau. GSK est un très grand consommateur. Ce process est peut-être aussi à optimiser.

Le 4^{ème} aspect, c'est la partie énergétique. Car pour maintenir des températures à -8 ou à -25 ou à -45 ou -50, tu peux imaginer la consommation nécessaire. Ces 4 aspects sont très importants. C'est donc principalement dans la production qu'il faut chercher les améliorations. Dans la distribution c'est aussi important, il y a des efforts à faire mais notre empreinte carbone et moins importante pour la question impact que les autres aspects évoqués.

J : Quand GSK considère dans sa supply chain toutes matières achetées, jusqu'à quel niveau fait-elle attention ? dès le début des matières achetées ?

P : oui, c'est le cas depuis 6ans, les achats sont impliqués dès l'introduction du nom des matières premières.

J : Penses-tu que l'utilisation de nouvelles technologies peut aider pour la traçabilité ?

Pour les nouvelles technologies, je veux parler du big data, internet of things etc.

P : Dans tous les points cités, dans la partie transport oui mais dans les autres aspects c'est plus technologique. En ce qui concerne la consommation d'énergie, tu pourrais avoir une consommation plus adaptée en fonction des différents fournisseurs et en fonction différents critères. Donc oui peut-être dans la partie utilisation énergie mais pas dans les deux autres parties. Mais ma connaissance à ce sujet n'est pas suffisante.

J : Est-ce que tu penses qu'il y a d'autres bénéfices que image de la marque et les nouveaux clients ?

P : Effets positifs, biensûr et oui il y en a d'autres. C'est très bien tout cela pour se re-challenger mais aussi on a besoin de jeunes talents qui en tant que jeunes regardent l'entreprise et son empreinte écologique. Cette entreprise sera plus attractive pour ces jeunes talents si on compare, par exemple, à une usine de cigarettes qui ne regarde pas à la partie sustainability. Ce sont des extrêmes mais c'est comme ça. En terme de politique gouvernementale, c'est important pour avoir des subsides. Et il y a encore beaucoup d'autres impacts possibles et de bénéfices mais cela doit rentrer dans la Culture de l'entreprise et c'est ce qui est difficile à changer chez GSK. C'est un énorme Challenge. La sustainability n'est pas forcément plus cher mais cela peut parfois apporter plus de contraintes. Globalement la sustainability ne devra pas coûter plus cher. Par contre, il y a des solutions qui seront plus chères et d'autres moins chères mais en globalité cela ne devra pas, pour moi, avoir un impact si négatif en disant que la sustainability coûte . Je ne suis pas convaincu de cela.

J : Donc je retiens dans les bénéfiques que tu as dit :

- *Le recrutement de talents*
- *Les subsides*

En barrière : changement de Culture mais en contre argument tu as dit que pas forcément plus cher en coût en global. Ce qui se dit souvent , c'est qu'à court terme cela va impacter les coûts de manière directe mais sur le long terme ce ne sera pas forcément plus cher.

P : oui c'est bien cela. Si tu regardes de manière étroite au cas par cas, tu auras des cas qui te coûtent plus chers mais si je regarde globalement ce ne sera pas le cas . Mais est-ce qu'on fait le bilan financier en incluant la partie sustainable? Non, en tout cas moi je ne le connais pas.

J : Est que tu sais si vous utilisez des indices de performances sustainable?

P : Oui justement il y a des KPI qui sont gérés au niveau global. Par exemple, dans la production de CO2 GSK global où on regarde les matières premières, transports ... on regarde différentes dimensions et tous les six mois il y a des personnes qui vont faire bilan de cela. Donc on regarde le bilan carbone mais je n'ai pas le souvenir qu'on fasse un bilan financier par rapport à cela. Par contre ces KPI ne sont pas repris en tant que KPI critiques pour le management team . Juste pour suivre le monitoring des targets.

J : Est-ce que tu penses qu'un investissement vers le durable peut amener à un avantage compétitif ?

P : pour moi oui comme dit. Pour moi c'est une obligation Au plus vite tu transformes ta société pour la partie durable au mieux tu la prépares pour l'avenir. Et au plus vite tu le feras au plus vite la culture va changer et quand tu auras pris de l'avance, là tu pourras en tirer profit ou bien tu auras pris du retard et tu auras un trou important à rattraper et tu perdras des parts de marché. Avec la génération qui sort des études et qui entre dans le monde du travail, c'est cette génération qui va avoir le pouvoir d'achat et c'est vous qui allez décider comment gérer et comment vous allez dépenser. C'est comme quand tu investis ...et que tu parles de ROI. Certaines sociétés y croient et investissent car elles attendent le ROI et d'autres n'y croient pas. Moi je pense que celles qui y croient et qui investissent vont avoir un ROI ! Voilà cela te convient-il?

J : oui super merci ! J'ai interviewé le directeur CSR de carrefour et il allait totalement dans le même sens que toi. Il faut anticiper si on veut le transformer en avantage compétitif.

P : oui encore plus important pour eux car ils sont encore plus proches de l'utilisateur que GSK

Ils doivent changer plus vite et il y a moins de lourdeur chez eux en tant que process

B) Carrefour

Quel est votre parcours et votre rôle au sein du groupe carrefour?

J'ai démarré il y a 20ans comme patron de la sécurité alimentaire puis de la qualité de l'ensemble de produits alimentaires et non alimentaires puis de l'environnement puis après de la santé puis s'est ajouté la couche de la durabilité. La responsabilité sociétale est venue normalement. Ce n'est qu'une évolution ou vous avez toute une série de développement sur les 20 dernières années qui traduisait les préoccupations de la société civile par rapport au contexte du marché. Ca a démarré par la crise de la dioxine et par la suite tous les deux ou trois ans il y avait une évolution de plus qui se manifestait, qu'il fallait anticiper pour pouvoir répondre aux attentes implicites du marché. En parallèle j'ai développé la même chose dans ma structure professionnelle qui est « comeos » ou j'ai d'abord créé la commission sécurité et qualité alimentaire. Quelques années plus tard, je créais la commission qualité et développement durable et responsabilité sociétale. Si vous allez sur internet sur le site comeos, vous aurez le premier rapport sectoriel du monde de la grande distribution en matière de responsabilité sociétale de développement durable qui a été édité en 2018. Mon évolution n'a rien de d'anormal si ce n'est qu'elle s'est faite en parallèle des besoins de la société civile ou c'était à chaque fois ma fonction qui avait la charge de répondre d'entraîner un mouvement que ce soit au sein des achats, au sein du marketing, des opérationnels pour pouvoir à la fois l'appliquer dans l'entreprise et puis petit à petit de le faire mieux percevoir dans les magasins, ce qui n'est pas encore une réussite à 100%.

Aujourd'hui je suis directeur de la responsabilité sociétale que j'ai créée quelque part avec mes collègues bien-sûr sur la qualité développement durable. Il faut aussi savoir qu'à la base, vous avez des obligations légales qui sont apparues et qui ont fait évoluer le contexte.

Il y a aussi une évolution de la législation qu'il ne faut pas perdre de vue et qui fait que des groupes comme les nôtres aujourd'hui nous avons un minimum d'obligations légales à remplir et dans lesquelles et dans lesquelles doivent se retrouver notre responsabilité sociétales ; ce que l'on fait en qualité de développement durable. Ca n'a rien avoir avec un avantage commercial, il fut considéré ce sujet je ne vais pas dire « régalién », mais quand même un peu. On ne fait pas cela pour se distinguer au niveau du commerce ; on fait ca parce que petit à petit ce sont des demandes légitimes de la société civile qui se traduit aussi au travers de législations. Vous avez des législations dans tous les domaines que ce soit sur l'emballage, sur les dons alimentaire, sur la réduction énergétique, que ce soit sur la mobilité , sur la santé (le nutriscore)

que se soit sur la composition des produits. Tous ces sujets que parfois d'aucuns se targuent à titre publicitaires « on fait ça ou on fait ça... » On le fait parce que il y a une législation à la base.

Il ne fait pas se dire « cocorico » on n'a plus de plastique chez soi, le tout est de savoir si on mesure ou on en est et si on répond aux normes minimales en la matière, et qu'est-ce qu'on fait pour aller au-delà ? et là vous pouvez rentrer dans l'utilisation pour du commercial.

Justement c'était ma prochaine question : On parle souvent des différents moteurs de ce changement vers le durable ; du coup on parle des pressions des parties prenantes de la supply chain des aspect réglementaires des fournisseurs etc. Selon vous lesquels ont le plus d'impacts ?

Vu vos études, vous savez par cœur quel est le moteur société privée. C'est évidemment son actionnariat ; au-delà des clients. Ce sont les 2 parties prenantes les plus importantes, associés au personnel de l'entreprise ; C'est déjà un premier cercle auquel il faut pouvoir répondre. Une société cotée en bourse a son rapport annuel d'activité dans lequel il y a les codes de gouvernance qui demandent de décrire ce que vous faites en matière de développement durable. Il y a là déjà la une pression qui vient de la tête de l'entreprise (les actionnaires, l'assemblée générale, le conseil d'administration, le comité de direction) vous avez de ce côté-là des demandes et des obligations qui s'expriment.

De l'autre côté, il y a les clients et des représentants de différentes ONG, que vous percevez au travers d'études de marché. Le client exprime des désirs en matière de qualité : il veut que ce soit bon et pas cher par exemple, et de l'autre côté il y a toute une série d'attentes implicites qu'il n'exprime pas nécessairement. (je voudrais savoir si ils respectent le bien-être animal ? est-ce que les emballages sont recyclables ? Est ce qu'ils sont respectueux de la bio diversité ? est-ce qu'ils respectent le travail non forcé ? ou le travail des enfants ? Il y a des attentes implicites grâce au travail des ONG qui petit à petit se transforment en attente implicites, à la base de ce phénomène, il y a aussi le politique qui est aussi sensibilisé.

Et qui va légiférer sur certains types d'attentes qui il y a 10 ans étaient implicites, et qui aujourd'hui deviennent explicites. Donc celles qui dominent les autres selon moi, c'est l'ensemble qui se développe en parallèle et qui a un moment va se rencontrer. Lorsque vous

essayez de devancer les attentes implicites et que je vous offre un produit garanti certifié pour le bien-être animal, pour la biodiversité, l'environnement, l'emballage est recyclable, il garantit la qualité alimentaire, etc ; je viens avec un tas de paramètres qui peuvent vous interpeller, mais qui essaye de devancer votre attente. Pour autant que le client soit conscient de ces valeurs ajoutées, et qui se disent : « pour ça je veux m'engager aussi » je vais acheter ce produit-là plutôt qu'un autre. C'est donc un équilibre. Si le client n'est pas sensibilisé au problème, vous aurez beau lui dire que ce que vous faites est très bien par exemple pour la planète, mais s'il n'y est pas sensible... il va dire moi je m'en fous, je ne le prends pas.

C'est à la fois une évolution : il faut anticiper les attentes de la société civile, mais vous ne pouvez les exprimer que quand cette même société civile est prête à les recevoir. C'est ça la difficulté que nous avons aujourd'hui. Nous sortons des projets dans le programme Act For Food chez Carrefour. Ce sont des réalisations que nous avons faites depuis 10 /15 ans. Ce n'est qu'aujourd'hui que la cible des clients y est sensible.

Le marketing se disait incapable de communiquer là-dessus car le client n'y était pas sensible.

Ce n'est pas tout à fait exacte car d'autres collègues ont communiqué là-dessus, et qui s'en sont même fait une certaine image, mais pour une partie très faible de la société.

Si vous prenez le marché bio : c'est entre 3 et 5% de la vente.

Mais vous avez des magasins spécialisés ou cette clientèle-là s'est engouffrée préférentiellement. Chez nous, nous savons qu'il y a environ 5% de la population qui sera opposée, 5% ultra pour, mais ceux-là ne sont pas nécessairement chez nous, il reste donc 90% dont la moitié selon nous est prête à passer au bio et qui ne le fait pas. Pourquoi ?

C'est là qu'on se dit que le prix a de l'importance. Il faut donc essayer de rendre démocratique certains types de produits sans pour autant léser ceux qui les produisent soyons très clair là-dessus. On va donc essayer d'influencer nos clients pour consommer plus de Bio.

C'est un exercice très différent que si les gens viennent chez vous et qui vous disent qu'on veut trouver des produits bio. Dans la démarche, c'est un équilibre entre l'offre et la demande.

Vous devez anticiper la demande et être prêt avec une offre qui correspond à ce que votre panel de clients souhaite. Vous pouvez essayer de les entraîner dans certaines voies, mais si ce que le client a acheté ne lui plaît pas, il ne l'achètera pas 2 fois ; et alors c'est lui qui reprends les rennes de la décision du marché. Parce qu'un produit qui ne s'achète pas est condamné. Donc vous ne pouvez pas vous tromper

Pour répondre clairement à votre question : Il faut tenir compte de cet équilibre offre et demande en essayant de percevoir quels sont les points les plus sensibles qui permettront à la clientèle d'évoluer dans son choix. Pour ça vous devez analyser les drivers qui sont derrière.

Là chacun y va de sa façon de faire.

Il y a des sociétés que nous avons connu qui ont développés des magasins Bio et qui les ont fermés, et qui ont préféré remettre les produits dans leur rayons bio de magasins traditionnels.

D'autres ont crée des magasins bio et qui aujourd'hui les ont toujours ; je parle de bio planète ;

Et le précédent c'était nos collègues de Delhaize qui tout un temps avait ouvert des Delhaize bio. Vous avez vu chez nous, nous avons réouvert la semaine passée un nouveau magasin Bio et on va voir si ça prend, si ça se développe et s'il y a un intérêt à en développer d'autres.

Il faut percevoir les tendances de la société civile et après les utiliser à es titres commerciaux, il faut être très prudent. Vous avez à faire à un qualiticien ; moi je suis un qualiticien ; j'ai horreur du marketing qui dit tout et n'importe quoi. Donc moi si on dit quelque chose, ça doit être prouvé, ca doit reposer sur des référentiels existants et crédibles. Quand demain je vous dis que je lutte contre le problème des fonds marins, ou que j'ai des poissons certifiés durables et qui garantissent une pêche durable, ca doit reposer sur des démarches agréées par tous de préférence accréditées, contrôlées et mesurées et certifiées pas des organismes compétents.

Regardez ce qui se passe dans le bio aujourd'hui !

Le bio c'est quoi ? C'est l'application du règlement européen ; mais dans chacun des pays, vous avez déjà un bio Plus ! Qu'est-ce que c'est qu'un bio plus ? c'est la législation européenne plus qu'on tient compte que le produit doit être national « belge ». Cela veut dire qu'un bio français n'est pas reconnu comme un bio belge ; qu'il doit être issus d'une exploitation ou le producteur est bien payé et qu'il doit respecter l'environnement, et qu'il doit être munit d'un emballage recyclable. Vous voyez donc que le bio basic qui est basé fondamentalement sur l'arrêt d'usage de pesticides. Vous avez des tas d'exigences qui s'ajoutent et qui dit maintenant nous allons faire un bio plus ou bien il va y avoir du bio plus plus. Pourquoi : c'est parce que le produit conventionnel a déjà intégré la plus plus mais qui ne sont pas nécessairement sans résidus de pesticides. Encore une fois c'est un équilibre entre attentes d'un côté et des opportunités de développement de l'autre. Est-ce que ca répond à votre question de base ?

Ca a répondu, mais vous avez apporté beaucoup de contenu en plus.

Je reviens sur votre question de base sur le fait de savoir si ce sont des atouts commerciaux ?

Le développement durable, la responsabilité sociétale. C'est pourquoi vous devez bien être conscient des définitions. Ce sont des avantages quand vous avez été capable d'identifier en leader le premier les tendances du marché qui dans le futur s'avère devenir une réalité. Prenez par exemple la chaîne Colruyt qui déjà dans le passé étaient connus et toujours connus pour leur respect de l'environnement. Et ce qui a fait ça, était qu'ils étaient les premiers en Belgique à avoir une éolienne au niveau de leur entrepôt, et tout le monde qui passait par les entrepôts de Colruyt voyaient cette éolienne qui produisait l'énergie. Ils ont été avant-gardiste, c'est quelque chose d'extraordinaire.

Et avec l'image ils ont développés tout un contexte qui après c'est bien sûr développé dans les magasins. Si vous voyez le modèle Colruyt, ça n'a rien à voir avec le modèle carrefour c'est le jour et la nuit. Nous avons une génétique différente ? ne me demandez pas à moi de faire comme Colruyt et ne demandez pas à Colruyt de faire comme carrefour. Nous sommes deux animaux différents. Par contre, nous pouvons avoir des objectifs communs : réduire le carbone ; j'aurai peut-être plus de travail que mes collègues de Colruyt. Parce que Colruyt dans son modèle ou tout est basé sur l'économie il dépense évidemment nettement moins de carbone que moi ou c'est le temple de la dépense. C'est l'offre excessive.

Donc pour comparer ces deux génétiques, vous vous rendez compte qu'il va y avoir une démarche différente mais qui vont viser les mêmes objectifs. Le tout sera de voir et de mesurer jusqu'à quel point la clientèle mesure l'amélioration apportée et y est sensible ; parce que évidemment tous ceux qui sont environnementalistes au départ vont peut-être aller plus en direct chez mon collègue Colruyt et chez moi ils viendront moins. Chez moi j'ai d'autres clients ; on se partage tous le marché de façon assez équilibrée. Mais eux viennent chercher autre chose chez moi : la qualité du produit, le goût du produit, la diversité ; ce n'est pas interdit ; moi je dois travailler avec d'autres axes pour arriver à réduire mon bilan carbone pour avoir un impact climatique important. Donc vous devez bien faire attention qu'à la fois les modèles de bases ne sont pas les mêmes et qu'ils peuvent chacun en fonction de la génétique propre atteindre des objectifs, mais chacun avec des moyens différents. Et ça c'est très importants aussi dans votre réflexion, car le monde politique a tendance à dire : « on va appliquer la même règle pour tout le monde » non ce n'est pas vrai ; vous pouvez prendre 2 entreprises du même secteur qui vont être totalement ne fuisse que par leur actionnariat , ne fuisse que par leur objectifs

commerciaux différents qui sont en liens directs pour réaliser leurs objectifs économiques et donc vont aborder le problème différemment ? et ça c'est de votre analyse à vous Ingénieurs qu'il est important de ne pas mettre tout le monde dans le même sac, et plutôt de voir comment chacun fonctionne et de voir comment chacun peut répondre individuellement aux objectifs de la société civile. Et la société civile s'exprime de plus en plus, on l'a vu dans les manifestations pour le climat et autres et donc celui qui a réussi et donc ça rejoint le titre de votre travail, c'est celui qui a eu un moment donné cette intuition, cette intelligence d'investir dans un domaine qui aujourd'hui devient général.

Etre avant-gardiste ?

C'est de ça que vous devez partir. Dans les définitions, vous devez retenir une chose.

Pendant 20 ans on a toujours parlé que de qualité ; et à chaque fois c'est quoi la qualité ; allez voir sur internet la définition iso de la qualité : c'est l'ensemble des caractéristiques d'un produit ou d'un service qui lui confère l'aptitude de répondre à des attentes explicites et implicites de clients.

Les attentes explicites, c'est bien ça qui bouge sans arrêts, parce que vous avez des attentes implicites qui ne sont pas exprimées et qui dorment dans la tête du client, et c'est pour ça que vous alliez plus tantôt chez Delhaize, tantôt chez Carrefour tantôt chez Colruyt, parce que vous aviez des attentes implicites que vous rencontrez là, parce que tous nous nous battons sur de bons produits au meilleur prix. Mais les autres chevaux de bataille sont les attentes implicites. Ce sont des attentes d'ordre qualité, prix, goût, environnement, bien-être animal, durabilité... pour moi vous pouvez tout mettre. C'est pourquoi ma fonction au départ chez Carrefour, a démarré par la sécurité alimentaire. J'étais directeur qualité pour la traçabilité de la viande bovine. Elle s'est complétée de toutes ces autres approches. Donc je n'ai fait que faire passer des attentes implicites dans des besoins explicites. Et aujourd'hui la responsabilité sociétale c'est la façon volontaire dont une entreprise traduit son approche de durabilité par rapport à la société civile. Ça c'est la définition européenne. Le développement durable c'est subvenir aux besoins présents sans conséquences négatives pour les besoins futurs. Donc cela s'articule sur 3 axes : environnemental, sociétal et économique. Donc, dans le groupe Carrefour au niveau international, nous avons quatre axes : anti-gaspi, environnement/biodiversité, partenariats locaux, bien-être du personnel avec des actions de solidarité. La volonté de notre nouveau président c'est de devenir leader de la transition alimentaire. Pour que les clients mangent plus

sain et plus respectueusement de l'environnement. Nous on a appelé ça, « act for food ». Qui reprend tout ce qu'on fait depuis des années pour la durabilité. Comme retirer certains additifs. Et on s'est rendu compte que c'était un élément différenciant. On veut aussi augmenter la consommation de produits bio en offrant du bio moins cher pour que tout le monde puisse se permettre d'acheter du bio. Mais attention, pas n'importe comment. Cela ne doit pas nuire aux producteurs donc nous avons des engagements aussi à ce niveau-là. Il faut revoir les circuits, les raccourcir et augmenter les volumes. Cela va coûter moins cher donc on pourra baisser les prix. C'est cette transformation que Carrefour veut mettre en place au niveau mondial.

Cela peut être un argument commercial si le client comprend la démarche et qu'un organisme extérieur le démontre, pas si Carrefour le prétend. Et cela ne doit pas être de l'application de législation car cela, tout le monde y est tenu. Il y a aussi le problème « Too Good To Go ». Maintenant les associations ne récupèrent plus les restes. Moi je m'y suis opposé tout un temps. J'ai mis en place une autre initiative : La bourse aux dons. Ce sont des jeunes qui ont eu l'idée d'un logiciel qui met en rapport ceux qui peuvent donner des produits et ceux qui ont besoins de les recevoir. Ils établissent donc un circuit pour relier ces personnes. J'ai donc inscrit tous mes magasins là-dedans et j'étais fier de cela. Après est venue la législation concernant les dons. La législation a en fait pris l'exemple de Carrefour pour écrire l'article de loi. La société « Too Good To Go » revend en fait ce que moi je donnais. Donc cette initiative pour réduire les déchets, cela fonctionne que si les produits étaient destinés à la poubelle. Mais nous, on les donne. Et je le dis aux magasins, il faut penser à la solidarité plutôt que récupérer les derniers centimes. Je demande donc aux entreprises comme Too Good To Go, de ne pas venir en opposition aux banques alimentaires. Les deux sont admissibles mais n'oublions pas ce qui est le plus important au niveau sociétal : la solidarité.

Quels outils utilisez-vous pour mesurer votre performance ?

Chez nous, tout se traduit dans un rapport d'activité annuel qui est obligatoire pour toute société cotée en bourse. Donc tout ce que nous faisons a été mesuré par des organismes d'audits compétents. Notre sustainability index est estimé à 70%, ce qui est une très bonne note pour un distributeur. Nous sommes évalués également de manière financière. C'est important d'être soutenu par les financiers pour augmenter la durabilité. Et eux me soutiennent car je crée de la valeur pour l'entreprise en augmentant peut être le panel de client. Nous suivons des standards de la grille gri, et trois agences de notations notent ce que nous faisons. Tout est dans le rapport.

J'applique les standards de bien-être social pour tous les achats qui sont en dehors de l'Europe pour garantir la social accountability. Nous avons des standards de sécurité alimentaire : HACCP, ISO 22000. On travaille avec les standards ISO 50001 pour tous nos magasins en Belgique pour la réduction énergétique. Nous travaillons avec le nutriscore pour les problèmes de santé. On travaille sur un sustainability index pour les produits que nous commercialisons. Nous travaillons sur la réduction des emballages. Il y a aussi des initiatives plus ponctuelles comme un lien direct avec les producteurs locaux sans passer par les centrales d'achat etc. Ici c'est donc le distributeur qui s'est mis à la taille du producteur local. On a travaillé en inverse pour savoir ce que le producteur a besoin pour travailler avec nous. Traditionnellement, cela n'est pas comme ça. Mais je pense que cette initiative c'est le fonctionnement de la société de demain. La société de demain avec la digitalisation du commerce à prendre en compte. Le commerce, avec des outils nouveaux, doit s'adapter. Chez Carrefour, notre président a pointé deux défis dans la société actuelle : la digitalisation de la société et la transition alimentaire. Nous devons absolument être leader de la transition alimentaire au travers d'une digitalisation intensive. De là, la restructuration des équipes dans différents pays. Tous les membres de Carrefour ont désormais un Iphone. Heureusement que nous avons développé tout cela depuis des années. Comme par exemple, ce lien avec les producteurs locaux. Mais cela a été possible grâce à la remise en question.

Si je résume, si on veut pouvoir considérer le durable comme un avantage, il faut pouvoir anticiper et non subir ce qui va arriver.

Effectivement, et pour bien anticiper, et c'est là qu'on manque de mesures. Si on prend Nielsen, cet institut de sondage ne fait que constater par après ce qui est devenu la réalité de marché. Et en matière de durabilité, cela ne les a jamais intéressés. Et maintenant, ils viennent me dire que ce qui est intéressant, ce sont les produits locaux et le bio. Merci je le sais. Et c'est ça qui nous manque. Il faut des observatoires de la société civile qui permettent de mieux anticiper les besoins de demain pour aller de l'avant. Mon objectif pour la durabilité c'est que tous les distributeurs du marché aillent dans la même direction, parce qu'alors vous avez un impact pour faire bouger un marché. Ensemble, on peut faire bouger un marché. Donc le débat de la durabilité de doit plus être développé au niveau individuel mais au niveau collectif, de la société. Et c'est pour cela que de plus en plus de plateformes se créent. La deuxième conclusion c'est que cette évolution se faire avec le plus grand nombre. Cela doit donc être discuté au niveau sectoriel. Par exemple, c'est dans le monde des entreprises que les efforts les plus importants

ont été faits dans les émissions de carbone. Mais cela a été mal communiqué. Les efforts concernant le carbone ont commencé en 2008. Ce qui compte pour moi c'est d'éveiller le sens critique.

Un grand merci pour ces réponses.

C) Interview farm

Qu'est ce qui pousse farm au changement ?

Il y a une sensibilisation notoire de la population à l'environnement, à sa santé et à la provenance du produit. Il y a aussi un changement de modèle et de paradigmes qui poussent les magasins à devenir plus bio. Client tient compte de ses attentes pour ses achats et ses investissements.

La rentabilité des actions durables est-elle meilleure ? Elle n'a pas de valeur premium comparée à certaines boîtes portées sur la technologie.

Farm ne travaille qu'avec des producteurs accrédités, c'est-à-dire en permaculture, pas de bio intensif

La vision de farm est celle de toucher le plus grand nombre de consommateurs bio pour leur apporter des aliments sains et de qualité. Ils ont un niveau d'exigence très haut. Ils veulent prendre des parts de marché aux grandes surfaces qui vend 50% de volume bio chaque année. Les chiffres du bio augmentent de 10% chaque année selon lui.

Si la demande augmente, on peut faire augmenter la production mais c'est le rôle des distributeurs de communiquer et de rassurer les agriculteurs. Olivier souligne l'importance des relations avec les agriculteurs

Est-ce que vous avez des mesures de performance pour le durable ?

% de produits locaux

% d'emballage supprimé

Augmentation des produits de saison

Réduction de l'empreinte carbone

Quelles sont les barrières et les risques ?

Complications d'un point de vue logistique si on veut augmenter fortement le volume car le but n'est pas de tomber dans un bio de masse. Il faut donc augmenter les périmètres de vision et de partenariat ce qui représente un challenge pour l'environnement

Quand la crise carbone arrivera et elle arrivera un jour selon Olivier, il faudra être prêt à répondre aux impacts de celle-ci mais Olivier ne sait pas encore comment répondre à cette crise sociétal.

Pour obtenir un avantage compétitif :

Il faut répondre aux attentes du consommateurs c'est-à-dire,

- le local qui est assuré grâce aux chartes
- le gustatif

C'est un secteur en croissance, même les grandes surfaces s'y mettent, ça permettra de voir si le consommateur est bio ou bio engagé

Certains investisseurs créent des plateformes avant de se faire racheter par un grand groupe.

Il faut un mouvement de groupe pour sensibiliser la population :

grande surface = bio sans pesticides

Petite surface = bio engagée

Et farm est le plus engagé, charte à l'appui

APPENDIX 5 : Market Survey

Enquête sur l'impact de mesures en entreprise alimentaire sur le consommateur

Ce questionnaire a pour objectif de mesurer la réaction des consommateurs wallons face à certaines pratiques des entreprises dans le secteur de l'alimentaire. Il servira pour des fins purement académiques et non commerciales.

Ce test devrait durer environ 7 minutes. Il n'y a pas de bonnes ou mauvaises réponses, essayez juste de répondre de manière instinctive.

* Required

Haut du formulaire

Section 1

1. Faites-vous les courses vous-même? *

Mark only one oval.

- Oui
- Non

2. Dans quel type de magasins faites-vous vos courses? *

Check all that apply.

- Grande surface (grande chaîne)
- Petite surface (Grande Chaîne)
- Magasin en Vrac
- Petite chaîne
- Marché
- E-commerces
- Other:

3. Qu'est ce qui vous attire dans ces magasins? *

Mark only one oval per row.

1 très peu 2 peu 3 moyennement 4 fort 5 très fort

Diversité des
Produits

Prix

Origine des
Produits

Facilité d'accès

Marque du
Magasin

Pubs

Goût des
produits

Marque des
Produits

Qualité des
produits

4. Achetez-vous des produits labellisés bio.

Mark only one oval.

- Oui
- Non

5. Quel pourcentage de vos achats alimentaires est-il labellisé bio? *

Mark only one oval.

- 0%-20%
- 20%-40%

- 40%-60%
- 60%-80%
- 80%-100%

6. Achetez-vous plus de produits bio qu'il y a 2 ans? *

Mark only one oval.

1 2 3 4 5

Pas d'augmentation

Très forte augmentation.

7. Si vous avez répondu oui à la question précédente, quelles sont les raisons principales?

Check all that apply.

- Votre santé
- La publicité
- Votre entourage
- L'évolution des prix
- La disponibilité
- Other:

8. Le souci d'un monde plus durable vous importe-t-il? *

Mark only one oval.

1 2 3 4 5

Pas du tout

Totalement

Section 2

9. Portez-vous une attention particulière à l'aspect durable des produits que vous achetez?

*

Mark only one oval.

1 2 3 4 5

Non

Très important

10. Quelles sont vos attentes principales lors de l'achat d'un produit labellisé bio? *

Mark only one oval per row.

	1	Pas 2	Peu 3	4	Forte 5
	d'importance	d'importance	Importance moyenne	importance	Importance capitale
Origine du produit					
Labels					
Packaging recyclable					
Prix juste pour les producteurs					
Qualité gustative					
Prix					
L'aspect santé/apport nutritionnels					
Conditions de travail respectueuses pour les producteurs					

11. Êtes-vous prêt à aller dans un magasin expressément pour 1 ou 2 produits plus durables?

*

Mark only one oval.

1 2 3 4 5

Pas du tout d'accord

Totalelement d'accord

12. Qu'est ce qui vous rend loyal à une chaîne de magasin alimentaire? *

Mark only one oval per row.

1	Pas du	2	Peu	3		4	Fort	5	Très fort
	tout				Moyennement				

Son image

Son aspect
durable

Ses produits

Vos habitudes

Sa proximité

Prix

13. Avez-vous déjà entendu parler des campagnes Act for Food, Nutriscore, A Better Tomorrow ou d'autres actions menées par les distributeurs alimentaires? *

Mark only one oval.

1 2 3 4 5

Pas du tout

Très souvent

14. Comment obtenez-vous des informations sur les pratiques durables mises en place par les magasins? *

Mark only one oval.

- Recherche personnelle
- Publicité
- Famille, amis, connaissance

- Lecture des étiquettes
- Média
- Other:

15. En tant que consommateur, quels sont selon vous les challenges logistiques les plus importants dans le monde de la distribution alimentaire? *

Mark only one oval per row.

	1	Pas 2	Peu 3	4	5
	d'importance	d'importance	Moyennement important	Importance forte	Importance capitale

Réduction des
émissions
carbone.

Réduction des
invendus et du
gaspillage

Recyclage des
déchets

Circuits plus
courts

Utilisation
d'énergie verte

Emballage
recyclable

Zéro
emballage (
vrac)

1	Pas 2	Peu 3	4	5
d'importance	d'importance	Moyennement important	Importance forte	Importance capitale

Transition
alimentaire de
la population (
Produit de
saison

Salaire décent
pour les
producteurs

16. Avez-vous une meilleure image d'un distributeur alimentaire qui met en place des pratiques plus durables comme celles-citées dans la question précédente? *

Mark only one oval.

- Oui
- Non

17. Combien seriez-vous prêt à payer en plus pour des produits qui se soucient des argument précédents? *

Mark only one oval.

- 0%
- 10%
- 20%
- 30%
- 40%
- 50%

18. Pensez-vous que les grands distributeurs sont-ils capables de rendre leur produits plus respectueux sur le point de vue social et environnemental ? *

Mark only one oval.

- Oui
- Non

19. Quel est selon vous le grand distributeur le plus durable en Wallonie? *

Mark only one oval.

- Lidl
- Aldi
- Carrefour
- Delhaize
- Colruyt
- Cora
- Intermarché
- Je ne sais pas

20. Quel est selon vous le petit distributeur le plus durable en Wallonie? *

Mark only one oval.

- Bi'OK
- Bio-Planet
- Färm
- Sequoïa
- Biodis
- Biocap
- Je ne sais pas
- Other:

21. Selon-vous un produit bio est il nécessairement durable? *

Mark only one oval.

1 2 3 4 5

Pas du tout

Totalement

22. Les magasins se revendiquant bio sont-ils capables d'offrir des produits plus durables selon vous? *

Mark only one oval.

1 2 3 4 5

Pas d'accord

Totalelement d'accord

23. Fréquentez-vous des plus petites structures? (Coopératives, magasin BIO, ferme, marché,..) *

Mark only one oval.

- Jamais
- Plusieurs fois par semaine
- 1/semaine
- 1/mois
- De manière ponctuelle

24. Si vous avez répondu jamais à la question précédente, quel est l'élément principal qui vous en empêche?

25. Pensez-vous que les petites structures ont de l'avenir? *

Mark only one oval.

1 2 3 4 5

Pas d'accord

Totalelement d'accord

Section 3

Dans cette section, imaginez que vous deviez travailler dans le secteur alimentaire.

26. L'image de l'entreprise pour laquelle vous travaillez a-t-elle de l'importance pour vous? *

Mark only one oval.

1 2 3 4 5

Pas du tout d'accord

Totalelement d'accord

27. Vos valeurs vous importent-elles dans vos choix de carrière? *

Mark only one oval.

1 2 3 4 5

Pas du tout d'accord

Totalelement d'accord

28. Pensez-vous que votre travail serait de meilleur qualité si vous travailliez pour une entreprise dont vous êtes fier ? *

Mark only one oval.

1 2 3 4 5

Pas du tout d'accord

Totalelement d'accord

29. Seriez-vous intéressé de travailler dans une entreprise plus durable? *

Mark only one oval.

1 2 3 4 5

Pas du tout d'accord

Totalelement d'accord

30. Pensez-vous que la durée de votre carrière dans une entreprise plus durable aura tendance à être plus longue? *

Mark only one oval.

1 2 3 4 5

Pas du tout d'accord

Totalelement d'accord

31. Si le salaire (tout avantage compris) était 10% à 20% inférieur comparé à une compagnie carbone, seriez-vous intéressé de travailler dans une entreprise plus durable?

Mark only one oval.

1 2 3 4 5

Pas du tout d'accord

Totalelement d'accord

Section 4

Nom et Prénom *

32. Province d'habitation *

Mark only one oval.

- Brabant-Wallon
- Hainaut
- Liège
- Luxembourg
- Namur

33. Sexe *

Mark only one oval.

- F
- M

34. Age *

Mark only one oval.

- 18-25
- 26-35
- 36-45
- 46-60
- 60+

35. Niveau d'étude *

Mark only one oval.

- Primaire
- Secondaire
- Supérieur