

RESPONSIBLE SOURCING PRACTICES IN TURKEY, THE CASE OF FOOD AND BEVERAGE INDUSTRY

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ABSTRACT

An increase in environmental awareness has affected companies in many aspects, including sourcing. It is vital for natural assets to be managed sustainably and used efficiently across all industries of the economy, in the particular food industry.

The aim of this study is to investigate the largest companies' responsible sourcing practices in food&beverage industry. These companies are the biggest consumer of primary resources so they have a significant effect on sustainability in the industry. The paper includes an examination of 23 food&beverage companies in the Top 100 rankings by The Istanbul Chamber of Industry (ISO).

Responsible sourcing practices of companies have been analyzed into two parts as assessment and collaboration. Survey, interview and analysis of secondary data method were used together. According to results, while assessment practices mostly focused written supplier requirements, collaboration practices focused on providing training.

Keywords: Responsible Sourcing, Sustainable Supply Chains, Sustainability, Food and Beverage Industry

1. INTRODUCTION

More and more companies are under increasing pressure from a wide variety of stakeholders, including consumers, non-governmental organizations (NGOs), local communities, public and governmental officials, to implement corporate social responsibility (CSR) management systems across the whole supply chain (Govindan, Khodaverdi, Jafarian 2013:347). CSR is mainly depend on sustainability concept. The most comprehensive definition of sustainability is “ensuring that we meet our

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needs without compromising the ability of future generations to meet their own needs (World Commission on Environment and Development 1987:43).

In general, firms may be liable for their purchased products or services but they have almost no legal responsibility towards the environmental activities of their suppliers (Simpson, Power 2005:60). But there is increasing consumer and stakeholder expectation for firms to be fully accountable for their business operations (Ashby et al, 2012:497).

Changing market dynamics are also increasing the importance of sustainability efforts:

- Customers are becoming more environmentally conscious. Younger consumers in particular demand sustainable products and practices and will pay more to get them.
- Increasing scarcity of the natural resource (e.g. climate change, water scarcity) and rising commodity prices make resource efficiency and waste reduction crucial variables for companies to remain profitable.
- Increasing pressures come from the regulatory environment and NGOs for being more transparency about socio-economic issues, drives non-compliance costs and can create a backlash from the marketplace (WEF, 2015:6).

Because of these changes increasing the number of companies are exploring how to identify, assess, and monitor supplier-related social issues and practices (Awaysheh, Klassen, 2010:1247).

Food & beverage industry is placed between agriculture (previous step) and food retail and foodservice (next step) so they are faced with the demand from partners both upstream and downstream, and are therefore central to the discussion of sustainable food production (GRI 2008:6). The challenge of the sustainable food supply is certainly not only a supply side problem but also reinforced by rapid global population growth (Gold, Heikkurinen, 2013:277). Also in the case of food products, the biggest sustainability impacts not happen during in the transport or manufacturing of the final product instead of this, it happens in the farming and production of agricultural raw materials (Springer et al. 2015). This inference drives companies to implement a sustainable sourcing strategy.

2. THEORETICAL BACKGROUND

Social issues relating to sourcing are referred to in varied ways in the relevant literature, and sometimes the same terms are used with different meanings or vice versa.

As seen in the Table 1 terms that refer to the social aspect of sourcing need a greater alignment.

Table 1. Definitions of Various Terms Refer To the Social Aspect of Sourcing

Author(s)	Terminology	Definition
(Pagell, Wu, Wasserman 2010:58)	Sustainable sourcing	managing all aspects of the upstream component of the supply chain to maximize triple bottom line (environmental, social and economic) performance.
(Srivastava 2007:54-55)	Green supply chain management	integrating environmental thinking into supply-chain management, including product design, material sourcing and selection, manufacturing processes, delivery of the final product to the consumers as well as end-of-life management of the product after its useful life
(Seuring & Müller, 2008:1700)	Sustainable supply chain management	the management of material, information and capital flow as well as cooperation among companies along the supply chain while taking goals from all three dimensions of sustainable development, i.e., economic, environmental and social, into account which are derived from customer and stakeholder requirements
(Wassell, 2010:259)	Responsible sourcing	is a voluntary commitment by companies to take into account social and environmental consideration when managing their relationships with suppliers
(Carter&Carter 1998:660)	Environmental purchasing	the purchasing function's involvement in supply chain management activities in order to facilitate recycling, reuse, and resource reduction
(Maignan, Hillebrand, Mcalister 2002:642)	Socially responsible buying	the inclusion in purchasing decisions of the social issues advocated by organizational stakeholders
(Min,Galle 2001:1223)	Green purchasing	an environmentally-conscious purchasing practice that reduces sources of waste and promotes recycling and reclamation of purchased materials without adversely affecting performance requirements of such materials.
(Thornton, Autry, Gligor, Brik 2013:68)	Socially Responsible Supplier Selection	a firm's capabilities for and/or orientation toward selection of suppliers that embrace sustainability and corporate social responsibility principles when conducting normal operations
(Drumwright 1994:1)	Socially responsible organizational buying	is that which attempts to take into account the public consequences of organizational buying or bring about positive social change through organizational buying behavior
(Spence,Bourlakis 2009:291-292)	Supply chain responsibility	is the chain-wide consideration of, and response to, issues beyond the narrow economic, technical and legal requirements of the supply chain to accomplish social (and environmental) benefits along with the traditional economic gains which every member in that supply chain seeks.

Generally, firms build up a dual relationship- assessment and collaboration- with its suppliers to ensure sustainability.

Table 2. Assessment and Collaboration Practices

<i>Assessment practices</i>	<i>Collaboration practices</i>
<ul style="list-style-type: none"> • Establishing written supplier requirements • Selecting the supplier that most comply with the firm's corporate sustainability standards during an initial contracting/ tendering phase, • Requesting certifications from suppliers, proving that suppliers fulfill social or environmental requirements, • Conducting audits to asses of supplier sites and processes and consequently the identification of non-compliance with CSS • Monitoring suppliers' sustainability performance 	<ul style="list-style-type: none"> • Communication • Training or workshops, • Employee transfers • Technological Integration • Logistical Integration • Joint Development

Source: (Grimm/Hofstetter/Sarkis 2014:161; Ciliberti/Pontrandolfo/Scozzi 2008:1580; Beske/Seuring 2014:324).

According to the most recent research assessment alone is not sufficient to improve sustainability, firms need to engage in collaborative practices with their suppliers (Gimenez, Tachizawa, 2012:541).

Common CSR issues between the focal firm and its suppliers include human rights, underage labor, long working hours, pollution, monitoring mechanisms for self-controlling, women labor issue (harassment, less maternity leave etc.), organizational legal responsibilities (paying tax, paying customs etc.), environment (green design, green manufacturing etc.), community (exploitation of public land, giving interruption to the local native peoples etc.) (Kumar et al, 2014:271).

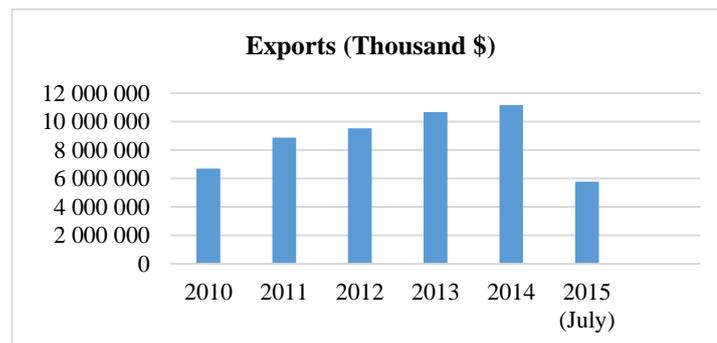
3. FOOD AND BEVERAGE INDUSTRY IN TURKEY

Food and beverages industry is an industry where vegetable and animal raw materials are transformed into finished goods which have long shelf life and are ready for consumption (ITO, 2006:19). It involved all stakeholders from agriculture to the consumers.

As a result of rich agricultural sources of the country, the industry is one of the first established industries in Turkey's economy. After the establishment of the Republic, Turkey's industrialization process has begun with this industry. The first modern food processing factories are established for sugar, flour, and beer. Politic and economic liberalization owing to the process of transition to the multi-party system in Turkey facilitated private investments to value-added food products in the 1950s. But the main development of the industry occurred in the planning period in the 1960s. Therefore, the actual improvement has been realized due to planned economy which has been implemented since 1963. Most of the investments have done by government in milk, meat or fish processing facilities in particular during 1960-1970 period. In the 1980s, the food processing industry has become one of the most attractive industry to private investment by liberalization in all economic industries (TUSIAD, 2007:107).

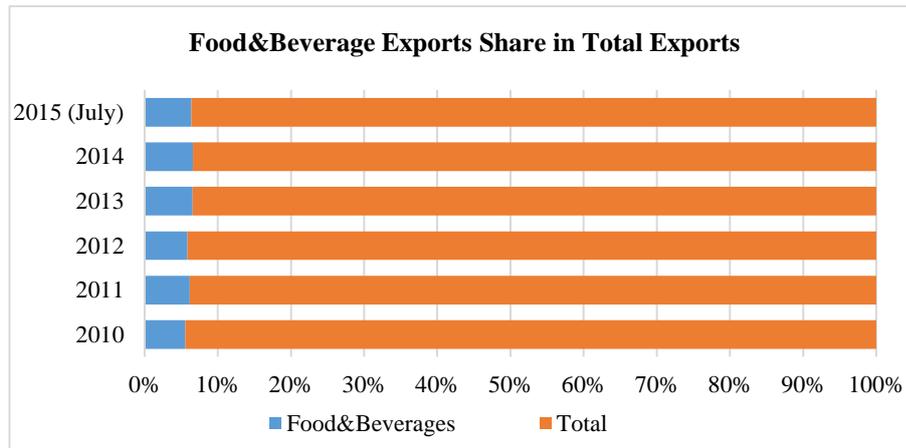
Food and beverages industry is one of the leading, most competitive and dynamic industries in Turkey. Coca-Cola, Nestle, Danone, and Ferrero are among the international companies in Turkey. The industry is the second largest industry in the country with over 440 thousand employees and 40 thousand business. In 2014, exports of the industry amounted to USD 11 billion, an increase of 4.1% compared to 2013, accounting for around 7 percent of the total exports.

Graphics 1. Exports Amount



Source: (Turkstat, 2015c)

Graphics 2. Exports Share



Source: (Turkstat, 2015c)

Processed fruit and vegetable sub-sector accounted for highest share in total export of the industry. Top ten export partners are Iraq, Germany, Syria, Netherlands, USA, UK, Saudi Arabia, France, Italy and Israel. The import sector in 2014 was 3.2 percent compared to the previous year and amounted to 5.6 billion dollars. Imports of the industry amounted to 5.6 billion dollars increase of 3.2 % compared to previous year. Grains constituted the largest share of industries' total imports with 2.3 billion dollars. Most of the imports came from Russia, Indonesia, USA, Ukraine, Germany, Netherlands, Malaysia, Italy, UK and Argentina (TGDF, 2015).

Total household expenditure on food and non-alcoholic beverages accounted for around 19.7% of all expenditure in 2014 (Turkstat, 2015a). Industrial production index of the industry has increased continuously in the last 5 years.

Table 3. Industrial Production Index

Industrial production index (2010=100)	2011	2012	2013	2014	2015*
Food	124,1	124,6	137,2	145,2	109,8
Beverages	70,4	86	87,4	93,3	130,6

*July

Source: (Turkstat, 2015c)

The importance of innovation is increasing in the industry as well as in many other industries.

Table 4. Expenditure on Research and Development

	2010	2011	2012	2013
Food	59.736.755	74.392.093	81.026.886	121.852.031
Beverages	1.122.661	1.341.411	1.407.061	1.821.649

Source: (Turkstat, 2015c)

Business in food and beverages industry have to pay attention to basic agriculture inputs and make research to improve efficiency and effectiveness in agriculture. Lack of qualified raw materials is one of the major reasons why the capacity utilization rate remains at the level of 60-70% for years (KB 2014:50). Capacity utilization rate is 73.1% in food and 59.7 % in beverages in 2014 (TCMB, 2015).

According to 2014 Global Hunger Index Turkey's score is less than 5 that means Turkey is self-sufficient in basic food production (Turkstat, 2015b). Although Turkey is self-sufficient in most food items, its agriculture industry is relatively poorly structured and inefficient when compared to the EU average and it constitutes a disadvantage for food& beverage industry (Leeuwen et al. 2011:3).

4. METHODOLOGY

4.1. Sample

The Istanbul Chamber of Industry (ISO) annually releases the rankings of Turkey's top 500 industrial firms. There are 23 food&beverage companies in Top 100 in 2014 and these consists the sample of the study.

Table 5. Food and Beverage Companies in the Turkey's Largest 100 Companies

No	Rank in ISO 500	Company name	Business Activities	Public/Private	Net Sales (\$)¹	Sustainability Report
1	17	Unilever Türkiye	Fast moving consumer goods	Private	1.169.638.219	Available (Since 2007)
2	19	Türkiye Şeker Fabrikaları	Sugar	Public	1.064.038.788	None
3	31	Eti Gıda	Biscuit	Private	785.561.463	None
4	37	Coca-Cola Beverages	Beverages	Private	704.447.213	Available (Since 2007)
5	38	Oltan Gıda	Hazelnut	Private	702.527.667	None
6	39	Ak Gıda	Dairy	Private	702.234.034	None
7	40	Konya Şeker	Sugar	Private	689.250.479	None
8	44	Çaykur	Tea	Public	655.849.993	None
9	46	Banvit	Chicken meat	Private	636.741.779	None
10	51	Sütaş	Dairy	Private	593.420.612	None
11	54	Abaloğlu	Feed- Chicken meat	Private	550.935.471	None
12	69	C.P. Gıda	Chicken meat	Private	413.739.813	None
13	74	Ülker Bisküvi	Biscuit	Private	390.276.921	None
14	75	Şenpiliç	Chicken meat	Private	381.989.708	None
15	77	Keskinoglu	Chicken meat	Private	362.110.568	None
16	78	Ülker Çikolata	Chocolate	Private	361.581.101	None
17	80	Oltan Fındık	Hazelnut	Private	358.107.893	None
18	82	Anadolu Efes	Beer	Private	342.407.818	Available (Since 2008)
19	91	Beypiliç	Chicken meat	Private	325.815.230	None
20	94	Pınar Süt	Dairy	Private	319.560.069	Available² (2011)
21	96	Namet Gıda	Meat	Private	308.247.604	None
22	97	Kayseri Şeker	Sugar	Private	306.454.230	None
23	98	Küçükbaş	Oil	Private	306.413.046	None

470

4.2. Method

To collect data in this study, survey, interview and secondary data analysis methods were used together. All accessible resources were examined to carry out the study. Firstly it was tried to gather information from companies via an online survey. After phone calling survey link was sent to companies. Some of them preferred to provide information by phone interview. [Consequently](#), all accessible resources were examined. Web sites, annual reports, corporate governance compliance reports, sustainability reports (if available) and news of companies deeply analyzed.

¹ According to the current exchange rate (1 dollar=2,9 Turkish Lira)

² Pınar Süt is a subsidiary of Yaşar holding and the sustainability report involves all subsidiaries of the holding.

5. RESULTS

Practices of firms' examined under two category in compliance with relevant literature. As seen in Table 6 most of the companies have assessment practices. But their assessment process and requirements have been varied among companies.

Table 6. Assessment Practices of Companies

Unilever Türkiye	<ul style="list-style-type: none"> ▪ Assessing suppliers about complying with principles of Unilever's responsible supplying (These principles including many issues like deforestation and human rights)
Coca-Cola İçecek	<ul style="list-style-type: none"> ▪ Assessing suppliers (improvement audits, plant visits, supplier days, supplier performance scores, Green Supplier Awards) ▪ Managing child labor and biodiversity issues with regard to its suppliers' agricultural operations through Supplier Guiding Principles (SGP) audits conducted by third parties
Abalıoğlu, Namet Gıda	<ul style="list-style-type: none"> ▪ Monitoring suppliers sustainability performance ▪ Auditing suppliers
Ülker Bisküvi, Ülker Çikolata	<ul style="list-style-type: none"> ▪ Expecting suppliers to comply with Ethical and Working Principles of Ülker
Şenpiliç, Namet Gıda	<ul style="list-style-type: none"> ▪ Expect documents/certificates from its suppliers that demonstrate Compliance to Social and Environmental requirements
Ülker Çikolata	<ul style="list-style-type: none"> ▪ Evaluating food and packaging suppliers
Anadolu Efes	<ul style="list-style-type: none"> ▪ Expecting suppliers to comply with relevant legal regulations, adopt the business-ethics norms of company, and place the utmost importance on fundamental norms such as human rights, occupational health and safety, and environmental protection ▪ Forming an active methodology regarding the management of social, environmental, and economic risks and the tracking of supplier practice and performance in procurement processes from the supply chain
Pınar Süt, Namet Gıda	<ul style="list-style-type: none"> ▪ Supplier evaluation system (Scoring and monitoring)

Collaboration practices of companies have been placed in Table 7. Collaboration practices have been based on mostly training suppliers.

Table 7. Collaboration Practices of Companies

Unilever Türkiye	<ul style="list-style-type: none"> ▪ Training programs for suppliers ▪ Having a program with WWF named “Knorr Sustainability Partnership Program” which support suppliers to develop and use sustainable agricultural practices ▪ Having a sustainable tea agriculture project and the project involved trainings for farmers
Türkiye Şeker Fabrikaları, Ak Gıda, Konya Şeker, Banvit	<ul style="list-style-type: none"> ▪ Having training program about modern agriculture techniques for farmers
Eti Gıda	<ul style="list-style-type: none"> ▪ Working on irrigation efficiency in chosen grain field in Konya, which contains 14% of total farming fields in Turkey ▪ Training farmers about modern irrigation techniques
Sütaş	<ul style="list-style-type: none"> ▪ Making collaboration with universities and Ministry of Food, Agriculture and Livestock for organizing regular training programs about dairy, healthy production and efficient management ▪ Providing free consulting services
Ülker Bisküvi	<ul style="list-style-type: none"> ▪ Having a project for improving wheat seed
Ülker Çikolata, Ülker Bisküvi	<ul style="list-style-type: none"> ▪ Encouraging suppliers to get involved in international certification process
Ülker Çikolata	<ul style="list-style-type: none"> ▪ Conducting a project with WWF to improve efficiency in hazelnut farming (Ülker is the largest hazelnut buyer in Turkey. Most of their purchases are made from Giresun, city in Blacksea area, so they make a project to increase biological diversity in Giresun)
Oltan Fındık	<ul style="list-style-type: none"> ▪ Having a Project named The Future of Hazelnut. ▪ Providing free consulting ▪ Having a training program to create awareness about environment, biodiversity, child labor, proper farming techniques
Anadolu Efes	<ul style="list-style-type: none"> ▪ Having agricultural support and R&D programs to ensure sustainability of the raw material supply in terms of both quality and amount ▪ Conducting variety improvement studies aim to mitigate the effects of climate change risks on agricultural production, productivity, and product quality by focusing on varieties resistant to arid climates, as they require less water, energy, and pesticide consumption
Beypiliç	<ul style="list-style-type: none"> ▪ Cooperating with university to train farmers about good agricultural practices and Raising healthy broiler chickens
Pınar Süt	<ul style="list-style-type: none"> ▪ Producer Training Meetings ▪ Corporate newspaper for farmers (4 times of the year) ▪ Training films for producers
Kayseri Şeker	<ul style="list-style-type: none"> ▪ Making collaboration with Erciyes University to establish a training center for farmers to give information about agricultural technologies

6. DISCUSSION

Responsible sourcing practices are important for almost every industry especially in Food&beverage industry because of its great significance for sustaining human life. World’s population is increasing and the population is becoming more

urban also the amount of productive farmland is declining. Besides this conditions Water and energy scarcity is becoming a big problem. Therefore food&beverage companies no longer have the luxury of considering only cost factor when supplying materials.

Food&beverage industry is one of Turkey's most prominent industries. As mentioned before there is 23 Food&beverage Company in Turkey's 100 largest companies according to 2014 rankings by The Istanbul Chamber of Industry. These companies have used a significant portion of agricultural raw materials produced in Turkey in direct proportion to their size. As seen at Table 2 Only 4 of 23 companies has sustainability report and two of them are Unilever Turkey and Coca-Cola Company. According to information obtained by interview and research vast majority of the largest companies operating in Turkey, it is still unable to ensure its sustainability mission. Companies could only reflect sustainability mission to their supply chain if they had one. Nevertheless, a number of responsible sourcing practices performed due to growing awareness in the world.

These practices have been examined in two groups, namely assessment and collaboration practices in accordance with the relevant literature. Assessment practices mostly involve written supplier requirements. Few companies have written supplier requirements about sustainability. Also, companies which have no written supplier requirements could not be able to monitor their supplier's sustainability performance. Most of the collaboration practices have provided training. Few companies have made collaboration to achieve concrete practices. These companies have tended to benefit from institutions like universities.

It can be argued that responsible sourcing activities in food have two aspects. While first of these is focused on the *conservation of natural resources* and the second one has been focused on using harmless technology for the environment to maintain sustainability. Companies that are involved in research have been tried to accomplish the first goal. But the most important part of sustainability is achieving the first goal with environmental consciousness.

Consequently, results indicate that companies in the industry do not sufficiently understand the value of sustainability. Only a few of them have a report about

sustainability and most of them are a foreign or foreign-invested business. However, Turkey's harmonization with the EU environmental legislation has also accelerated its sustainability efforts.

This paper has focused on large enterprises. However the food&beverage industry is mostly consists of SMEs. It is known that SMEs pay less attention to sustainability efforts than large companies. They care about achieving cost advantage much than sustainability. This should be regarded as a distinct disadvantage for the industry.

There are limitations of the study that should be considered. One of the most obvious limitations is that most of the data which used are secondary data because of the difficulties of collecting data directly from companies. Therefore, the possibility arises that some sustainability practices has been ignored unintentionally.

List of Abbreviations

ISO: The Istanbul Chamber of Industry

KB: Ministry of Development of Turkey

TCMB: Central Bank of The Republic of Turkey

TGDF: Federation of Food & Drink Industry of Associations of Turkey

TURKSTAT: Turkish Statistical Institute

TUSIAD: Turkish Industrialists and Businessmen's Association

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