


NOT IN THIS TOGETHER

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HOW SUPERMARKETS BECAME
PANDEMIC WINNERS WHILE WOMEN
WORKERS ARE LOSING OUT

REPORT



OXFAM

OXFAM BRIEFING NOTE – JUNE 2021

This Oxfam briefing note presents compelling new evidence that supermarket shareholders and owners are some of the biggest winners in the COVID-19 pandemic. Booming business has allowed them to prioritize shareholder payouts while workers at the bottom of their supply chains particularly women – earn a pittance, with their rights violated. Women's exploitation in supermarket supply chains is pervasive and systemic, and too often women are left carrying the financial burden of the pandemic. Supermarkets and governments are at a crossroads and must act. They must choose whether to build a better global retail model that focuses on the interests of women, workers and their communities – or carry on turning a blind eye to escalating inequality.

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This paper was written by Anouk Franck and Art Prapha. Oxfam acknowledges the assistance of many individuals and organizations in its production: Jacques-Chai Chomthongdi, Rachel Colbourne, Christina Corbett, Rukia Cornelius, Lies Craeynest, Ranjana Das, Gustavo Ferroni, Uwe Gneiting, Asim Saqlain, Irit Tamir, Rapatsa Trirath, Charlotte Vollaard, and Rachel Wilshaw. The paper is part of a series written to inform public debate on development and humanitarian policy issues.

This paper aims to stimulate debate about improvements in working conditions and respect for human rights in supermarket supply chains. It does not constitute an offense nor is it intended to defame producers of Brazilian coffee, Pakistani rice, South African wine, seafood from Thailand or Assam tea from India.

We shared the draft texts that mentioned company information with the respective supermarkets for comments. We would like to thank all the supermarkets that responded with written feedback. Where possible and appropriate, we have incorporated their feedback.

For further information on the issues raised in this paper, please email advocacy@oxfaminternational.org

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Cover photo: Lúcia (not real name), 15, the daughter of a rural worker from the north of Minas Gerais, had her family rescued in conditions similar to slavery when working during the harvest in a coffee plantation. Lúcia and her eight-year-old brother migrated with their parents seasonally to work in the fields in regions in search of sustenance and food. Because of successive changes, both have learning difficulties. On the farm where their mother was rescued, the young people were unable to study and missed two months of school. Credit: Tatiana Cardeal/Oxfam Brasil

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FOREWORDS

Too many companies that profited during the COVID-19 global pandemic over the past year have left a shameful record as they pursue anti-union agendas, deny workers sick leave, and refuse to pay workers a minimum wage on which they and their families can live.

We must repair this broken labour market. This can only be achieved with a floor of workers' rights and protections for all workers irrespective of their employment arrangements. These protections are laid out in the International Labour Organization (ILO) Centenary declaration: the fundamental rights of freedom of association, the right to collective bargaining, the right to freedom from discrimination and to live free from modern slavery through forced and child labour. These must be accompanied by the right to occupational health and safety, a minimum living wage, and maximum hours of work.

This labour protection floor is a test of what really sits at the heart of today's business priorities and practices, across their supply chains: the people who produce their goods or services, or de-humanising exploitation. Exploitation of workers will only be eliminated if we end corporate impunity, with mandated due diligence for all corporations.

Oxfam's report starkly sets out the choices to be made by world leaders and businesses in 2021: will they heed the calls of workers and civil society to reform the failed economic model and help create a just and sustainable future with a New Social Contract? Or will they maintain business as usual and see a model of corporate greed entrench inequality, exclusion and despair, perpetuating instability for all of our communities and our planet.

I hope that this report by Oxfam will help to shed light on and engender understanding of the nature of the problems confronted by food industry workers worldwide. The current income of seafood workers in Thailand, by and large, is not adequate for them to make ends meet. It causes them to become indebted, have a declining quality of life, and commits them and their families to a life of poverty. Migrant workers employed in Thailand are only entitled to their daily minimum wage according to the Labour Protection Act 1998, even though some have been working in the country for between 4 and 10 years. These migrant workers should be paid on a monthly basis. Workers employed in certain sectors, including piece-rate pay workers, do not even earn a minimum wage as required by law. It should also be noted that female migrant workers earn less than their male counterparts. There should be no such discrimination.

I fervently hope that not only governments but also all companies in the food supply chains will revise their policies and practices to ensure fairness and sustainability. Workers are a major part in society. Businesses should take into account fairness and avoid discriminating against workers on the basis of their gender, race, religion, or colour. They should respect human dignity and fairness as universally adopted. The wealth of the rich has derived from the sweat shed by the workers. Ultimately, all workers – regardless of where they come from – should be entitled to the right to defend, organize and bargain for the right to organise and defend their rights.



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SUMMARY

SUPERMARKETS ARE DRIVING GROWING INEQUALITY

Inequality is worsening and exploitation of women is endemic across the global economy. While inequality of power and value was already deeply unfair before the pandemic, it has now reached shocking proportions. COVID-19 has cost global workers \$3.7 trillion in lost income, and women and young workers have been hardest hit,¹ as they are often found in the most insecure and lowest-paid jobs. Few places reveal this trend more clearly than supermarket supply chains.

In stark contrast to the escalating human misery brought by the pandemic, the supermarket sector has largely been the standout winner of the crisis.² Senior executives, the largest institutional investors, and mostly wealthy shareholders³ of global supermarkets continue to be rewarded with ‘business-as-usual’ high compensation and dividends. In fact, during the pandemic, publicly listed supermarkets distributed 98% of net profits to their shareholders via dividends and share buybacks.⁴ Meanwhile, workers and producers, especially women,⁵ across the globe – the people we call ‘essential’ or ‘frontline’ workers – have seen their incomes stagnate or even fall, while their rights continue to be violated.

STANDOUT WINNERS AND HUGE PAYOUTS

Oxfam’s analysis of the global supermarkets ranked in its Supermarket Scorecard⁷ (see figure 7 in chapter 4) found that inequality is being exacerbated by COVID-19, with a huge human cost:⁸

- Like-for-like food sales, excluding fuel, across **listed retailers⁹ grew by 11.1% on average during the second to fourth quarter of 2020**, up from just 1.6% sales growth in the same period in 2019. Non-listed retailers, such as **Aldi North, Aldi South and Lidl**, recorded an overall 8.5% increase in sales in 2020. **Jumbo’s** sales growth amounted to 11% for 2020 while **PLUS** reported a 14% sales increase.¹⁰
- The selected listed food retailers have seen share values skyrocket. **Their market capitalization increased by \$101bn** (between March and December 2020), compared to an increase of \$75bn in 2019.¹¹
- Between 2019 and 2020, **total dividends distributed to shareholders increased by 123%**, from about \$10bn to \$22.3bn.¹²
- **Owners of non-listed supermarkets**, such as the Albrechts (owners of Aldi North and Aldi South) and Dieter Schwarz, owner of the Schwarz Group (consisting of Lidl and Kaufland), have seen **their wealth increase by 37% and 30%** respectively, in less than a year.¹³

Costs related to COVID-19 reported by the supermarkets pale in comparison to **their additional revenues gained** and **increased shareholder payouts** during the pandemic. **Few have taken the opportunity to invest in longer-term supply chain improvements** to benefit the food producers and workers experiencing extreme hardship due to the pandemic.

* * *

‘WE NEED TO SEND REMITTANCES TO OUR CHILDREN EVERY MONTH. IT MAKES ME FEEL HEAVY-HEARTED SINCE I HAVE NOTHING TO SEND THEM. THEY KEEP SAYING THE MONEY HAS RUN OUT AND ASK ME TO SEND THEM SOME. I HAVE TO TELL THEM TO WAIT A BIT MORE. WE FEAR COVID-19. WE FEAR THAT ONCE WE CATCH IT, PEOPLE WILL LOATHE US.’

* * *

Chesa,⁶ a migrant worker from Myanmar, fish filleter, Thailand



Seafood vendor waiting for customers in Mahachai Market, Samut Sakhon, Thailand, on New Year Day which is different from the previous ones when the market was overcrowded with shoppers. Due to the outbreak of COVID-19, the shopping climate in the province appears more timid than any year. Credit: Patipat Janthong/Oxfam

WOMEN HIT THE HARDEST

Exploitation, gender discrimination and inequality in global food supply chains have been widely documented but remain largely unaddressed by supermarkets. In 2018,¹⁴ it would have taken a woman worker processing shrimp at a typical plant in Thailand more than 4,000 years to earn what the chief executive of a top US supermarket earned on average, in a year. In 2020, it would have taken her more than 5,700 years.¹⁵

Oxfam's new research highlights critical issues that supermarkets must address:

- **Violation of workers' rights is evident across multiple food supply chains in different regions.** Between November 2020 and February 2021 Oxfam conducted new research on working conditions in the production of coffee in Brazil, basmati rice in Pakistan and wine in South Africa, and updated earlier research on Assam tea production in India and seafood production in Thailand. Most workers and farmers interviewed by Oxfam and partners do not earn a living income or wage, and some do not even earn a monthly minimum wage. In Brazilian coffee production, slavery-like working conditions reported on Brazil's official Dirty List to combat modern slavery could be linked to many supermarkets' supply chains.

**OXFAM'S RESEARCH
REVEALS EVIDENCE
THAT WOMEN
WORKERS – WHO WERE
ALREADY EARNING
LESS – HAVE LOST
MORE INCOME THAN MEN
DURING THE PANDEMIC.**

- **The extractive business model continues, as does the unfair distribution of value across supermarkets' high-risk supply chains.** Between 2005 and 2019, workers' share of the end consumer price was consistently very low for wine (around 1%), tea (between 0.7% and 3%) and shrimp (less than 1%); it had declined for coffee since 2010, and was highly volatile for rice. Due to endemic structural inequalities, the share received by women workers was even smaller.
- **Women's rights violations in supermarket supply chains are pervasive and systemic.** COVID-19 has exacerbated existing structural gender inequalities and made the situation even more dire for women workers and farmers. Oxfam's research reveals evidence that women workers – who were already earning less – have lost more income than men during the pandemic. Women workers have effectively acted as shock absorbers during the pandemic and will end up worse off, while at the other end of the supply chain, companies and shareholders have continued to prosper.

Until now, supermarkets have failed to take adequate action to address the abuse of labour rights experienced by women in supply chains. Transparency is greatly lacking: of the retailers featuring in Oxfam's global Supermarket Scorecard, only Tesco has published a gender policy detailing the actions it will take to improve the position of women in four high-risk supply chains. None of the supermarkets are tracking and disclosing gender-disaggregated data.

SUPERMARKETS AT A CROSSROADS

Oxfam believes that supermarkets are at a crossroads, where they can choose to change their core business model to distribute more power and value to women in their supply chains. We propose that supermarkets take the following actions:

- Urgently revisit relevant policies and practices to factor in the risks to workers and small-scale farmers from COVID-19 and the impact on their job and income security; supermarkets should show how their plans have been updated to reflect the specific needs of women workers in their supply chains.
- Promptly address actual and potential human rights violations and respect workers' rights, including by committing to achieving living wages in supply chains.
- Urgently adopt a comprehensive gender policy and action plan to ensure that women's rights are respected, in supermarkets' own operations and supply chains.
- Shift corporate practice on maximizing shareholder payouts and redirect spending towards long-term supply chain investment that ensures fair and decent working conditions for workers, farmers and women in their supply chains.

Governments also need to act. They must repeal laws that discriminate against women, promote laws to guarantee a living wage for workers, adopt mandatory human rights due diligence legislation and put a stop to excessive shareholder payouts.

* * *

**OXFAM BELIEVES
THAT SUPERMARKETS
ARE AT A CROSSROADS,
WHERE THEY CAN
CHOOSE TO CHANGE
THEIR CORE BUSINESS
MODEL TO DISTRIBUTE
MORE POWER AND
VALUE TO WOMEN
IN THEIR SUPPLY
CHAINS.**

* * *

NOT IN THIS TOGETHER

BETWEEN 2019 AND 2020, LISTED SUPERMARKETS INCREASED THE TOTAL DIVIDENDS DISTRIBUTED TO SHAREHOLDERS BY 123%

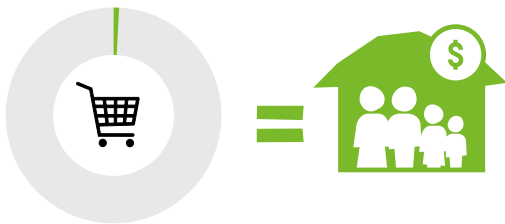


During the pandemic, listed supermarkets distributed **98% OF NET PROFITS** to their shareholders via dividends and share buybacks.




While almost none has made significant investment to support food workers and farmers in global supply chains.

Less than 1% OF SHAREHOLDER PAYOUTS in 2020 could close the gap between current wages and a living wage for workers in Brazil's largest coffee producing state.



The 16 leading global supermarkets have **NOT DONE ENOUGH TO PROTECT WOMEN.**



 6 supermarkets have no policies at all to protect the women who produce our food.

It would take **THOUSANDS OF YEARS** for a woman processing shrimp at a typical plant in Thailand to earn what the chief executive at a top US supermarket earns on average, in a year.



THAI SEAFOOD SUPPLY CHAINS

Female workers earn 28.7% less than their male counterparts.

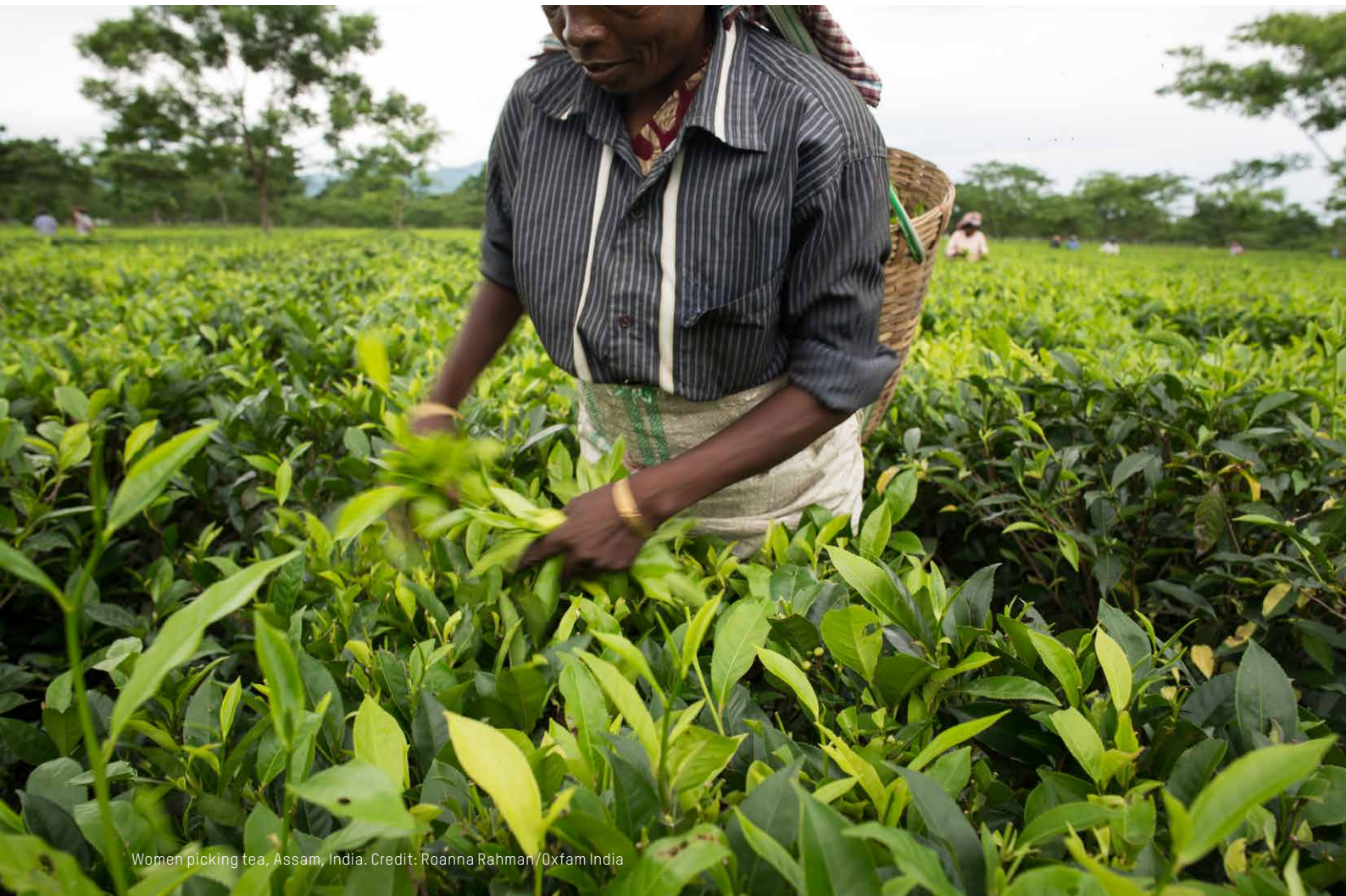


COFFEE FARMERS IN BRAZIL

Female workers earn 16% less than their male counterparts...



while on average being higher educated.



INTRODUCTION

In our 2018 report, *Ripe for Change*,¹⁶ Oxfam showed that women in global supply chains are particularly vulnerable as they are concentrated in the lowest-paid, least-secure jobs across the agri-food sector. Little has been done since then to improve their situation, as illustrated by the fact that a number of supermarkets have continued to score very poorly on gender indicators in Oxfam's global Supermarket Scorecard.¹⁷ Six supermarkets have no policies at all to protect the women who produce our food.¹⁸

COVID-19 has sharpened existing inequalities in global food chains and pushed many food workers and farmers in the Global South into greater poverty and acute uncertainty. Worldwide, during lockdowns, and when most other shops were closed, the role supermarkets play in our daily lives was suddenly thrown into sharp focus. Supermarkets and their workers played a central role in allowing us to buy food in a safe way, which was appreciated by many. As a result, the food retail sector has largely benefited from unprecedented sales growth during the crisis.¹⁹ While many other sectors are experiencing significant losses in one of the worst economic recessions since World War II,²⁰ leading global supermarkets have made record sales and most – except for UK supermarkets – earned additional operating profits during the crisis.²¹

* * *

**COVID-19 HAS
SHARPENED EXISTING
INEQUALITIES IN
GLOBAL FOOD CHAINS.**

* * *

But what have supermarkets done to address worsening inequality in their supply chains? Oxfam presents evidence that supermarkets have paid out billions to their shareholders and owners, while the women making our food have suffered more than ever. During 2020, eight large publicly listed supermarket chains – **Ahold Delhaize, Albertsons Companies, Costco, Kroger, Morrisons, Sainsbury's, Tesco and Walmart** – have collectively paid \$22.3 billion in dividends to their mostly wealthy shareholders.²² We have found no evidence of significant investment in improving the lives of workers and farmers in their global supply chains. Yet, less than 1% of these shareholder payouts in 2020 could close the gap between current wages and a living wage for all formal workers in Brazil's largest coffee-producing state.²³ Despite concerns raised by their investors,²⁴ workers²⁵ and consumers,²⁶ supermarkets have not stopped pursuing profit-maximizing and cost-minimizing strategies, and have failed to take adequate action to ensure respect for human rights in global supply chains.

Privately owned supermarkets, including **Aldi North and Aldi South, and REWE Group**, are not required to disclose financial information to the public. But some, such as **Jumbo, Edeka and PLUS Holding**, do publish annual financial accounts. However, limited evidence suggests that owners are taking high dividends out of some of these companies as well. This means money is syphoned out of the system to predominantly benefit supermarkets' wealthy owners, at a terrible cost to workers and farmers.

Women throughout food supply chains are facing high levels of inequality and discrimination. For example, women coffee workers in Brazil earn 16% less than their male counterparts, although on average they have higher levels of education.²⁷ And in Thai seafood supply chains, women earn nearly a third less than their male counterparts.²⁸ These inequalities have been exacerbated by the pandemic in many ways. For example, women on tea plantations in Assam were more severely impacted than men by the lockdown, losing 45 days' work on average compared to 33 days for men. In 2018, it would have taken a woman worker processing shrimp at a typical plant in Thailand more than 4,000 years to earn what the chief executive of a top US supermarket earned on average, in a year. In 2020, it would have taken her more than 5,700 years.²⁹

AIMS OF THIS PAPER

Based on these unjust global imbalances, this paper aims to present emerging and interconnected evidence on the following questions:

- How has COVID-19 affected financial performance and shareholder payouts of global supermarkets?
- How has the pandemic exacerbated economic vulnerability and gender inequality in supermarkets' global supply chains?
- How can supermarkets and governments ensure respect for human rights and gender equality in their supply chains?

Chapter 1 describes how supermarkets prioritized shareholder payouts with their booming business during the pandemic. **Chapter 2** analyzes the structural inequalities in the global retail business model. **Chapter 3** exposes new evidence of women's rights violations in Brazil and Thailand, often intensified by COVID-19, and reveals links to supermarket supply chains. **Chapter 4** shows the lack of adequate human rights due diligence and gender policies and practices to address these violations. While some progress has been made, women's rights remain a blind spot for most supermarkets. **Chapter 5** proposes a roadmap for supermarket and government action on workers' rights, gender equality and corporate governance.

* * *

**OXFAM PRESENTS
EVIDENCE THAT
SUPERMARKETS HAVE
PAID OUT BILLIONS TO
THEIR SHAREHOLDERS
AND OWNERS, WHILE
THE WOMEN MAKING OUR
FOOD HAVE SUFFERED
MORE THAN EVER.**

* * *

1. THE BIG SQUEEZE: SUPERMARKETS AND INEQUALITY

WE ARE NOT 'ALL IN THIS TOGETHER'

In relation to the global pandemic, we are repeatedly told that 'we're all in this together'. Yet over a year on from the start of the pandemic, workers and small-scale producers, especially women, connected to global food supply chains are struggling to get by in the worst recession since World War II,³⁰ while major supermarkets have seen record sales as consumers have stocked up food for home consumption due to the lockdown and have flocked to online sales out of concerns for safety, as well as convenience.

Oxfam has warned that it could take more than a decade for billions of the world's poorest people to recover from the recession caused by the pandemic.³¹ By comparison, it took just nine months for the 1,000 richest billionaires to recoup their COVID-19 losses.³² The World Bank reports that the pandemic is reversing poverty reduction efforts and will push millions of people into extreme poverty.³³ In January 2021, the International Labour Organization (ILO) stated that COVID-19 has cost global workers \$3.7 trillion in lost income and led to an 8.3% decline in global labour income.³⁴ Women and young workers have been hit hardest.

* * *

**THE WORLD BANK
REPORTS THAT THE
PANDEMIC IS REVERSING
POVERTY REDUCTION
EFFORTS AND WILL
PUSH MILLIONS OF
PEOPLE INTO EXTREME
POVERTY.**

* * *



New Oxfam-commissioned research examines how the pandemic has widened income and wealth inequality in supermarkets' global supply chains from March 2020 onwards.³⁵ The research focuses on the supermarkets assessed in Oxfam's global Supermarket Scorecard.³⁶ The research conducted an extensive review of publicly available information published by listed retailers: **Ahold Delhaize** from the Netherlands; **Morrisons, Sainsbury's and Tesco** from the UK; and **Albertsons Companies, Costco, Kroger and Walmart** from the US. The research also reviewed non-listed food retailers: Germany's **Aldi North, Aldi South, Lidl, Edeka and REWE Group**, and the Dutch retailers **Jumbo and PLUS**. Whole Foods, a subsidiary of Amazon, did not disclose its financial information separately, and thus is not included in the analysis. The UK supermarket Asda was, until recently, majority owned by Walmart. Oxfam has not analyzed Asda's financial information nor assessed its policies on human rights since the change in ownership, which was undergoing final approval by the UK authorities at the time of writing this report.³⁷

WEALTHY SHAREHOLDERS AND WORSENING INEQUALITY

Few places reveal this trend of worsening inequality more clearly than supermarket supply chains. Executives and wealthy shareholders of global supermarkets continue to reward senior executives, owners and investors with executive compensations and dividends as 'business as usual'. While frontline shopfloor workers have received some additional support in the form of bonuses or hazard pay – often limited in time and scope – agricultural workers and food growers in global supply chains are largely left behind despite risking their lives and working hard to keep food on our tables throughout the pandemic. At the same time, and in contrast to the escalating human misery caused by COVID-19, some of the world's richest families and individuals who own global supermarkets have multiplied their wealth:

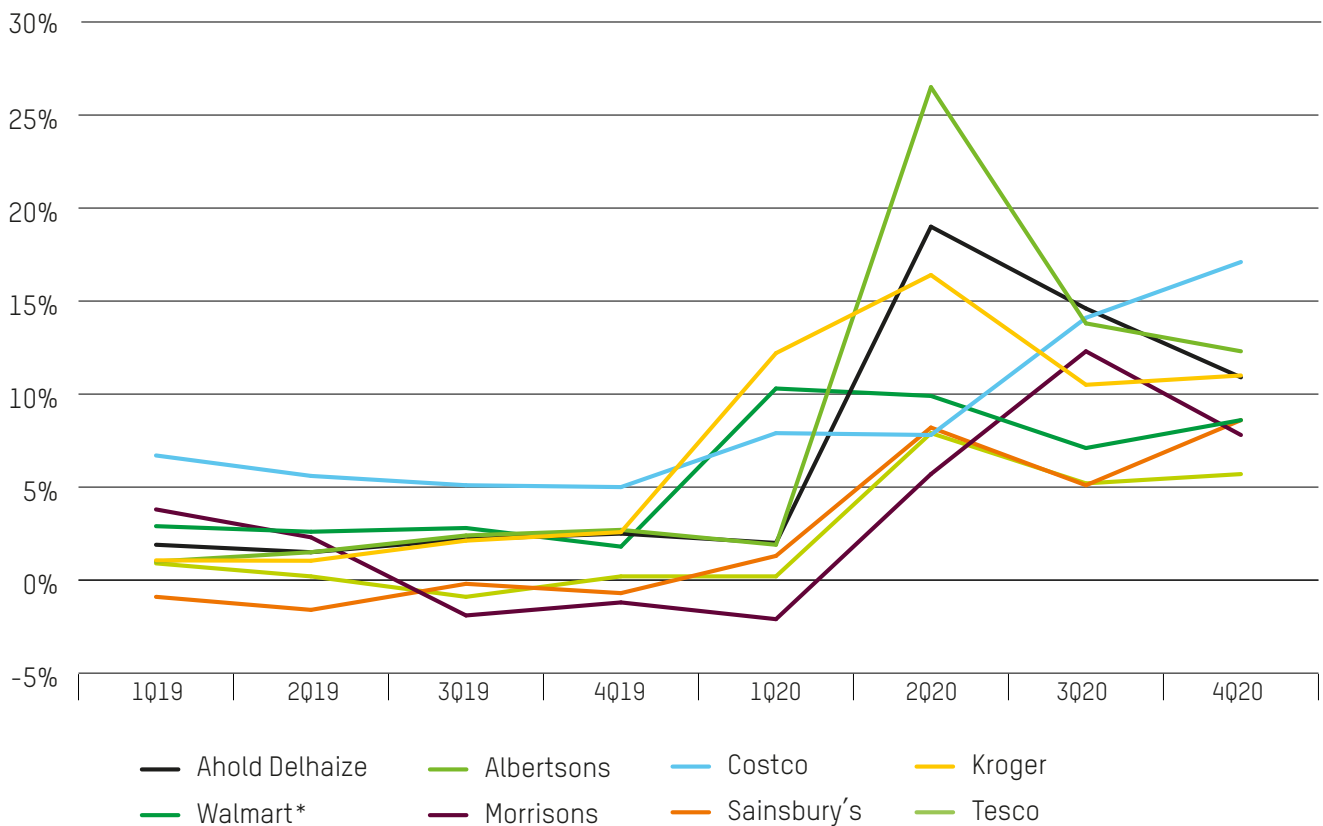
- The **Walton family**, owners of Walmart, saw their fortune grow by \$3m per hour on average over the past year and had a combined wealth of \$215bn in 2020.³⁸
- Aldi South is owned by the heirs of **Karl Albrecht – Beate Heister and Karl Albrecht Jr.** Their combined wealth increased from \$21.6bn in April 2020 to nearly \$30bn in January 2021.³⁹
- **Dieter Schwarz** owns Schwarz Group, Europe's largest food retailer. The German-based corporate group owns more than 12,500 Lidl and Kaufland stores, representing revenue of \$135.4bn.⁴⁰ Recent data shows that Schwarz Group's wealth grew by 30% in less than a year.⁴¹
- The owners of Dutch supermarket chain Jumbo, the **Van Eerd family**, are expanding their business empire through the acquisition of 50% of Dutch department store Hema⁴² through Mississippi Ventures, the family's investment vehicle. This has been made possible by raising the family's dividends over recent years. In 2020, the family received \$62.7m⁴³ in dividends.

FEW PLACES REVEAL THIS TREND OF WORSENING INEQUALITY MORE CLEARLY THAN SUPERMARKET SUPPLY CHAINS.

BOOMING BUSINESS BUT NO BETTER PAY FOR WORKERS

Based on Oxfam's calculations of listed companies' financial reports to compare performance before and after the pandemic, it was found that like-for-like sales (excluding fuel) across listed retailers grew by 11.1% on average during the second to fourth quarter of 2020, up from just 1.6% sales growth for the same period in 2019.⁴⁴ The surge in sales growth is evident across all listed supermarkets (see Figure 1).

FIGURE 1: LISTED RETAILERS' LIKE-FOR-LIKE SALES GROWTH (EXCLUDING FUEL) (% YEAR-ON-YEAR)



Source: Company Data; *Walmart's figures only include US operations (75% of total). All figures exclude fuel sales.

Following a similar trend, non-listed retailers, such as **Aldi North, Aldi South and Lidl**, recorded an overall 8.5% increase in sales from January to November 2020.⁴⁵ In 2020, Edeka and REWE Group have increased their sales by almost 17% in Germany, compared to 2019.⁴⁶ **Jumbo's sales growth in their existing stores amounted to 11%** for 2020 (adjusted for the 53-week year, it comes down to 9%)⁴⁷ while **PLUS** reported a 14.2% sales increase, from \$3.12bn in 2019 to \$3.56bn in 2020.⁴⁸

Ahold Delhaize, Albertsons Companies, Costco, Kroger and Walmart collectively gained \$41.2bn in extra revenues during the last three quarters of 2020, compared with 2019.⁴⁹ This resulted in additional nominal gross profit of \$14.1bn and additional operating profit of \$4.1bn for the same group of retailers. While the UK supermarkets, **Morrisons, Sainsbury's and Tesco** have seen a surge in sales during the pandemic, their profits⁵⁰ have dropped mainly due to significant COVID-19-related costs. However, commentators have cited other contributing factors, such as poor fuel sales⁵¹ and a decrease in sales of high-margin products (such as clothing) to explain the profit slumps.⁵² Although the UK supermarkets' profits have been impacted by COVID-19-related costs, they still generated extra revenues and most (except Sainsbury's) continued to earn profits, even though 2020 was cited as the year that the UK witnessed its worst economic performance for more than 300 years.⁵³

In the case of Sainsbury's, the company reported a pre-tax loss of £261m despite like-for-like sales (excluding fuel) rising by 8.1%.⁵⁴ The company's chief executive officer (CEO) cited high COVID-19 costs due to 'keep[ing] colleagues and customers safe during the pandemic'⁵⁵ as the reason behind the profits slump.

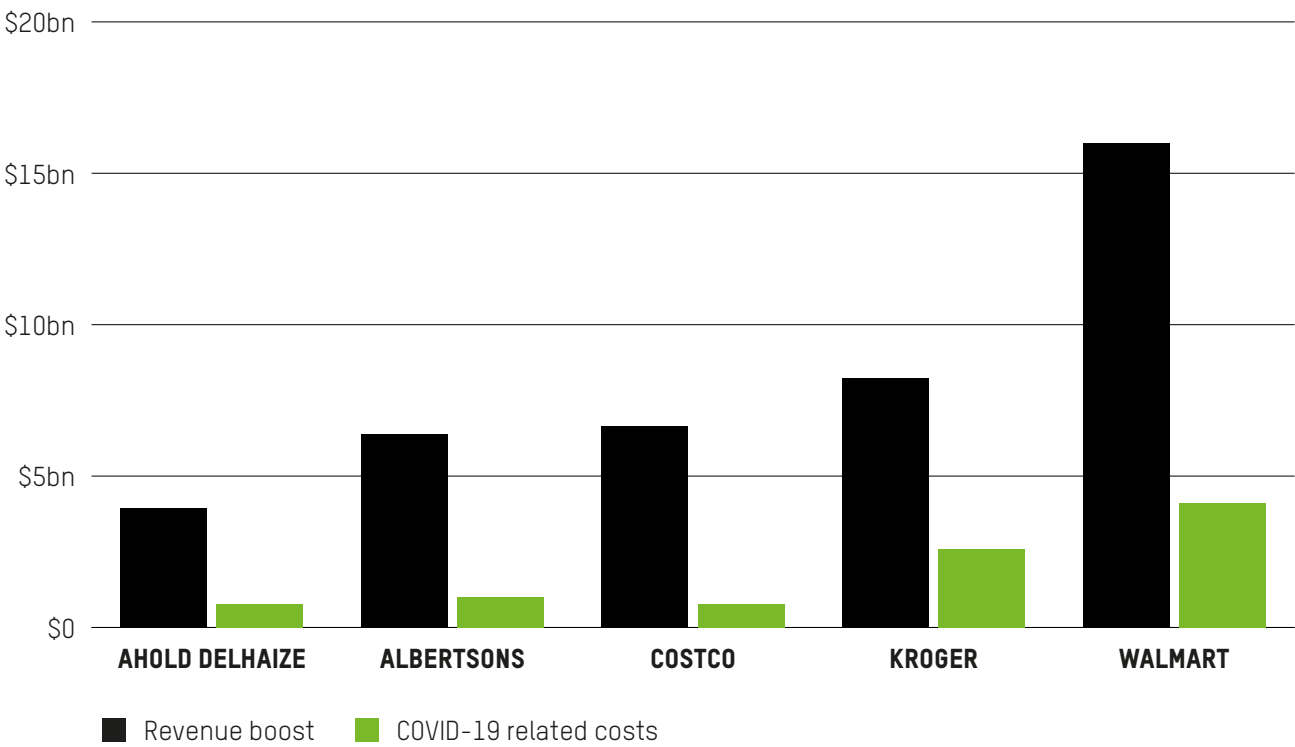
US RETAILERS AND AHOLD DELHAIZE COLLECTIVELY GAINED \$41.2BN IN EXTRA REVENUES IN THE SECOND TO FOURTH QUARTERS OF 2020 COMPARED TO THE SAME PERIOD IN 2019.

However, apart from the COVID-19-related costs of £485m, it should be noted that this year, Sainsbury’s also booked a significant increase in exceptional charges of approximately £660m. This figure comprised £423m related to the closure of 420 standalone Argos stores, and £220m due to impairments on physical assets,⁵⁶ which do not directly benefit workers.

Many supermarkets argue that they incurred high costs due to COVID-19, including temporary hazard pay or bonuses for frontline workers and costs of protective measures. However, compared to revenues generated during the same period, **listed retailers in the Netherlands, UK and US collectively spent only about \$11.3bn on such COVID-19-related costs** during 2020 (see Annex 1 for a list of reported COVID-19-related costs per supermarket).

Data on the US retailers and Ahold Delhaize⁵⁷ reveals a similar story, which is that COVID-19 compensations for frontline workers represent only a fraction of costs in comparison to the retailers’ turbocharged revenue during the pandemic. As Figure 2 shows, **US retailers and Ahold Delhaize collectively gained \$41.2bn in extra revenues in the second to fourth quarters of 2020 compared to the same period in 2019. In stark contrast, the US retailers and Ahold Delhaize collectively spent only \$9.2bn on COVID-19-related costs.**

FIGURE 2: ADDITIONAL REVENUE EARNED BETWEEN QUARTER 2 (Q2) AND QUARTER 4 (Q4) 2020 (VS Q2–Q4 2019) COMPARED TO COVID-19-RELATED COSTS FOR WORKERS (\$BN)



Source: based on calculations of US retailers’ published financial information.

Moreover, US retailers ended hazard pay to their frontline workers in June 2020⁵⁸ and declined to reinstate their policies during the second wave of COVID-19. Instead, workers were expected to bear the high risk of coming to work and performing their responsibilities without adequate compensatory and safety measures. According to a new report by a public health advocacy group, Human Impact Partners, more than 7,500 COVID-19 infections and 133 deaths could have been prevented if Walmart had offered employees two weeks' paid sick leave.⁵⁹ The US retailers could have increased compensation or financial support for their own frontline workers, and still have made profits, in an exceptionally difficult year for all.

THE WINNERS TAKE IT ALL

Shareholders for the listed retailers have always been the biggest winners even before the pandemic. Oxfam's analysis shows that the listed food retailers have increased their market capitalization by \$101bn (between March and December 2020), compared to an increase of \$75bn in 2019, while owners of privately owned supermarkets have seen their net worth skyrocket.

From 2015 to 2019, these leading retailers distributed 99% of net profits to their shareholders via dividends and share buybacks.⁶⁰ Dividends paid by these supermarkets grew by 30% from 2015 to 2019 (from \$7.7bn to \$10bn), while share buybacks grew from \$5.0bn to \$7.7bn – a 55% increase.⁶¹ Retailers' average payout⁶² of 99% of profits greatly exceeds the global average for multinationals across industries. By comparison, the **S&P 500** distributed an average of 87% as dividends and buybacks over the past decade, while the **Eurostoxx 600 firms** distributed 72% between 2010 and 2018.⁶³

Collectively, shareholders of listed retailers have benefited significantly from the pandemic's payout. Between 2019 and 2020, total dividends distributed to shareholders increased by 123% – from about \$10bn to \$22.3bn (see Table 1). Remarkably, **Costco declared a special dividend of \$4.4bn to reward its shareholders**, citing a 'strong balance sheet'.⁶⁴ This significantly increased Costco's dividend payment from \$1bn in 2019 to more than \$6bn in 2020.⁶⁵ Tesco has significantly increased its dividends due to the recent sale of its Thailand and Malaysia operations, returning \$6.97bn⁶⁶ to investors. Despite its reported 50.7% drop in profits in 2020, **Morrisons** has increased its full-year total dividend by 27.1%.⁶⁷ This brings Morrisons' shareholder payout ratio to a staggering 279% in 2020,⁶⁸ compared with 61% in 2019.⁶⁹ **Walmart** has confirmed to Oxfam that it has made no adjustment to its dividend policy. In February 2021, Walmart announced it had increased the company's dividend for the 48th consecutive year.⁷⁰

Supermarket CEOs and senior executives have also significantly benefited from the strong sales boost, as their remuneration package is often strongly linked with operational performance and shareholder returns. For instance, the CEO of **Ahold Delhaize**, Frans Muller, saw his income increase by \$1.9m to \$7.2m last year.⁷¹ Likewise, the head of **Ahold Delhaize USA**, Kevin Holt, received over \$1.8m more than the previous year, bringing his total remuneration package to \$6.3m.⁷² CEOs of US supermarkets **Costco**, **Kroger** and **Walmart** have seen their total remuneration increase between 2019 and 2020 (Costco, 2019: \$8m and 2020: \$8.3m [3% increase]; Kroger, 2019: \$21.1m and 2020: \$22.4m [6% increase]; and Walmart, 2019: \$22.1m and 2020: \$22.8m [3% increase]). By contrast, the Institute for Policy Studies (a US think tank) indicated that US workers saw a 2% decrease in their wages during the pandemic.⁷³ CEO compensation information for the UK supermarkets was not available at the time of writing.

* * *

**THE US RETAILERS
COULD HAVE
INCREASED
COMPENSATION OR
FINANCIAL SUPPORT
FOR THEIR OWN
FRONTLINE WORKERS,
AND STILL HAVE
MADE PROFITS, IN
AN EXCEPTIONALLY
DIFFICULT YEAR
FOR ALL.**

* * *

TABLE 1: DIVIDENDS DISTRIBUTED (IN \$ MILLIONS), 2015–2020⁷⁴

COMPANY	2015	2016	2017	2018	2019	2020
Ahold Delhaize	473	802	874	922	928	1,096
Albertsons ⁷⁵	0	0	0	0	0	94
Costco	N/A	746	3,904	689	1,038	6,189
Kroger	385	429	443	437	486	534
Walmart	6,294	6,216	6,124	6,102	6,048	6,166
Morrisons	184	171	313	403	270	344
Sainsbury's	354	275	290	321	93	508
Tesco	0	0	360	748	1,144	7,340
Total	7,690	8,639	12,308	9,622	10,007	22,271

Source: Refinitiv Eikon, company data.

LACK OF INVESTMENT IN GLOBAL SUPPLY CHAIN IMPROVEMENTS

While frontline shopfloor workers have received some support from retailers to deal with COVID-19 impacts, according to our research, there is little evidence that supermarkets have provided support to their global food supply chain partners. Since 2018, Oxfam has been raising the issue of supermarkets squeezing their suppliers, which leads to poverty and abuse in global supply chains.⁷⁶ Throughout the pandemic, supermarkets have not shown firm and sustainable commitments to address this critical issue. They have not shifted away from cost-minimizing purchasing practices and heavy reliance on social audits towards prioritizing suppliers who improve labour conditions in their supply chains and adopting a robust human rights due diligence⁷⁷ approach to report, mitigate and remediate human rights violations in high-risk food supply chains. As subsequent chapters of this report reveal, workers and farmers in global supply chains continue to face poverty-level wages, poor working conditions, lack of freedom of association and collective bargaining, gender discrimination and precarious employment.

There are a few exceptions. Earlier in the pandemic, **Morrisons** and **Aldi South** in the UK announced that they would make immediate payments to their smaller suppliers to support them during the pandemic.⁷⁸ **Sainsbury's** also committed to pay small suppliers immediately, benefiting nearly 1,500 small businesses that have less than £100,000 annual turnover.⁷⁹ In January 2021, **Tesco** announced long-term support for 1,300 of its smallest suppliers until the end of February 2022, continuing to have their invoices paid immediately instead of the usual 14 days.⁸⁰ However, industry experts have questioned whether such policies will continue beyond the pandemic.⁸¹ As an example, in July 2020, Sainsbury's ended its immediate payment policy for smaller suppliers.⁸² **There is no clear evidence that international**

WHILE FRONTLINE SHOPFLOOR WORKERS HAVE RECEIVED SOME SUPPORT FROM RETAILERS TO DEAL WITH COVID-19 IMPACTS, ACCORDING TO OUR RESEARCH, THERE IS LITTLE EVIDENCE THAT SUPERMARKETS HAVE PROVIDED SUPPORT TO THEIR GLOBAL FOOD SUPPLY CHAIN PARTNERS.

food suppliers in developing countries have received any such support from supermarkets, and some are still facing escalating cases of COVID-19 in the midst of the pandemic while the developed countries where these supermarkets are located are reopening their economies as more of their populations become vaccinated.

Finally, **US supermarkets and Ahold Delhaize** and other non-listed supermarkets (**Aldi North, Aldi South, Jumbo, Lidl, PLUS, Edeka and REWE Group**) have disclosed no or very limited information on their COVID-19-related expenditure in global food supply chains. From evidence to date, it is clear that the pandemic has financially benefited most global supermarkets and their owners, executives and shareholders. Meanwhile, evidence from the global food supply chains has revealed escalating human misery for workers, farmers and frontline food workers, especially women, as the COVID-19 crisis deepens across many developing countries.



Myanmar workers in Thailand queuing up for bags of relief items from the Migrant Workers Rights Network (MWRN).
Credit: Patipat Janthong/Oxfam

2. A BUSINESS MODEL BUILT ON LABOUR EXPLOITATION

UNEQUAL PORTIONS – VALUE DISTRIBUTED UNEVENLY ACROSS SUPPLY CHAINS

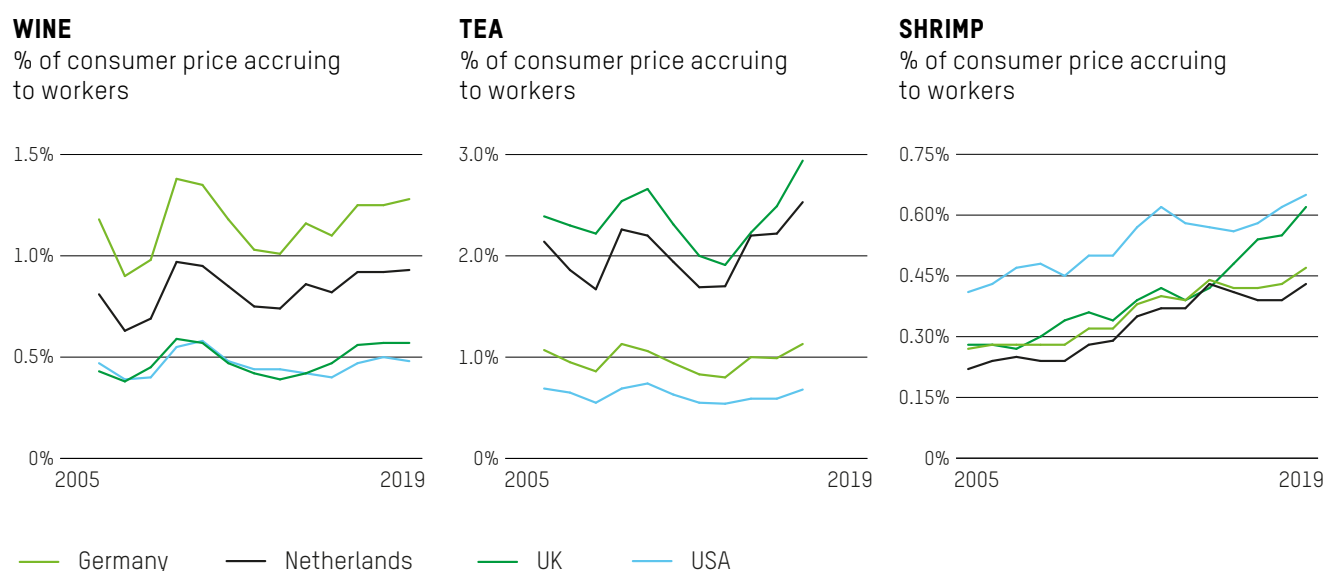
In our 2018 report *Ripe for Change*,⁸³ Oxfam showed that the value of products is distributed over the supply chain in a very skewed way – benefiting supermarkets and large brands while squeezing workers and small-scale farmers. The underlying research revealed that, between 1995 and 2011, for the basket of goods studied, the share of value accruing to supermarkets has consistently gone up, while for workers and small-scale producers the already low share has declined further, exposing the entrenched and growing inequality in supply chains.⁸⁴

New research for Oxfam⁸⁵ reveals the unequal distribution of value for coffee from Brazil, tea from India, basmati rice from Pakistan, wine from South Africa, and shrimp from Thailand, between 2005 and 2019. The research focuses on supply chains related to the following consumer countries: Germany, the Netherlands, the UK and the US.

For most commodities, the work in the fields, in processing or in aquaculture is paid out of the consumer end-price, with incredibly low margins. As Figure 3 shows, values accruing to workers are consistently incredibly low for wine (around 1%), tea (between 0.7% and 3%) and shrimp (less than 1%).

BETWEEN 1995 AND 2011, FOR THE BASKET OF GOODS STUDIED, THE SHARE OF VALUE ACCRUING TO SUPERMARKETS HAS CONSISTENTLY GONE UP.

FIGURE 3: VALUES ACCRUING TO WORKERS FOR WINE, TEA AND SHRIMP

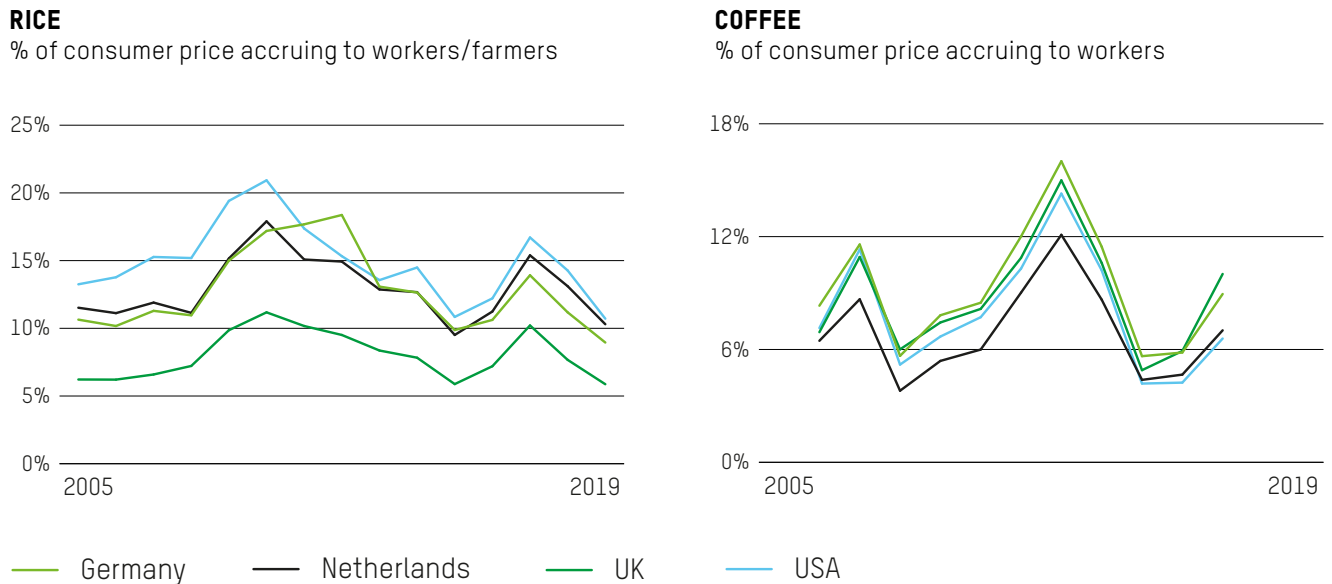


Source: Le Basic calculations, conducted for Oxfam, December 2020 to January 2021.

In the case of coffee (see Figure 4), the value accruing to workers is slightly higher, but has decreased by almost 50% since 2010 in all consumer countries analyzed. Moreover, this share of value was calculated on the consumer price of a 250g pack

of ground coffee – it would be about five times lower if calculated on the price of a coffee capsule.⁸⁶ For rice (Figure 4), the share of value accruing to farmers is of a similar (albeit somewhat lower) magnitude as for coffee, but most importantly, it is very volatile. This negatively affects rice farmers' economic position and prevents them from planning ahead.

FIGURE 4: VALUES ACCRUING TO WORKERS FOR COFFEE AND RICE



Source: Le Basic calculations, conducted for Oxfam, December 2020 to January 2021.

The fact that workers and small-scale producers consistently receive such a small share of every dollar paid at the checkout explains their constant struggle to overcome poverty, and lays bare how inequality has become a standard feature of supermarket supply chains.

NEW EVIDENCE FROM BRAZIL, PAKISTAN, SOUTH AFRICA, INDIA AND THAILAND

Oxfam conducted new research into working conditions in the production of **coffee in Brazil, basmati rice in Pakistan and wine in South Africa**, and updated earlier research on **Assam tea production in India and seafood production in Thailand**. The regions studied are all key global production locations for these commodities. Oxfam established supply chain linkages between Brazilian coffee farms as well as Thai seafood producers and many Dutch, German, UK and US supermarkets. For the other commodities studied, supply chain linkages have not been actively researched and are not easy to establish due to lack of transparency in supermarkets' supply chains. The commodities chosen are a broad set of commonly sold food products in supermarkets, representing the systemic issues that workers face in production locations in typical supermarket supply chains.

None of the workers and small-scale producers interviewed by Oxfam in the five countries involved earn a living income or wage, while many do not even earn a minimum wage. In Brazilian coffee production, farms listed on the Brazilian 'Dirty List' (which lists farms with conditions equivalent to slavery) could be linked to supermarkets' supply chains (see Chapter 3). We find that violation of women's rights in supermarket supply chains is pervasive and systemic, and that structural

inequalities affecting women (raised in earlier Oxfam reports⁸⁷) make them particularly vulnerable to crises such as COVID-19.

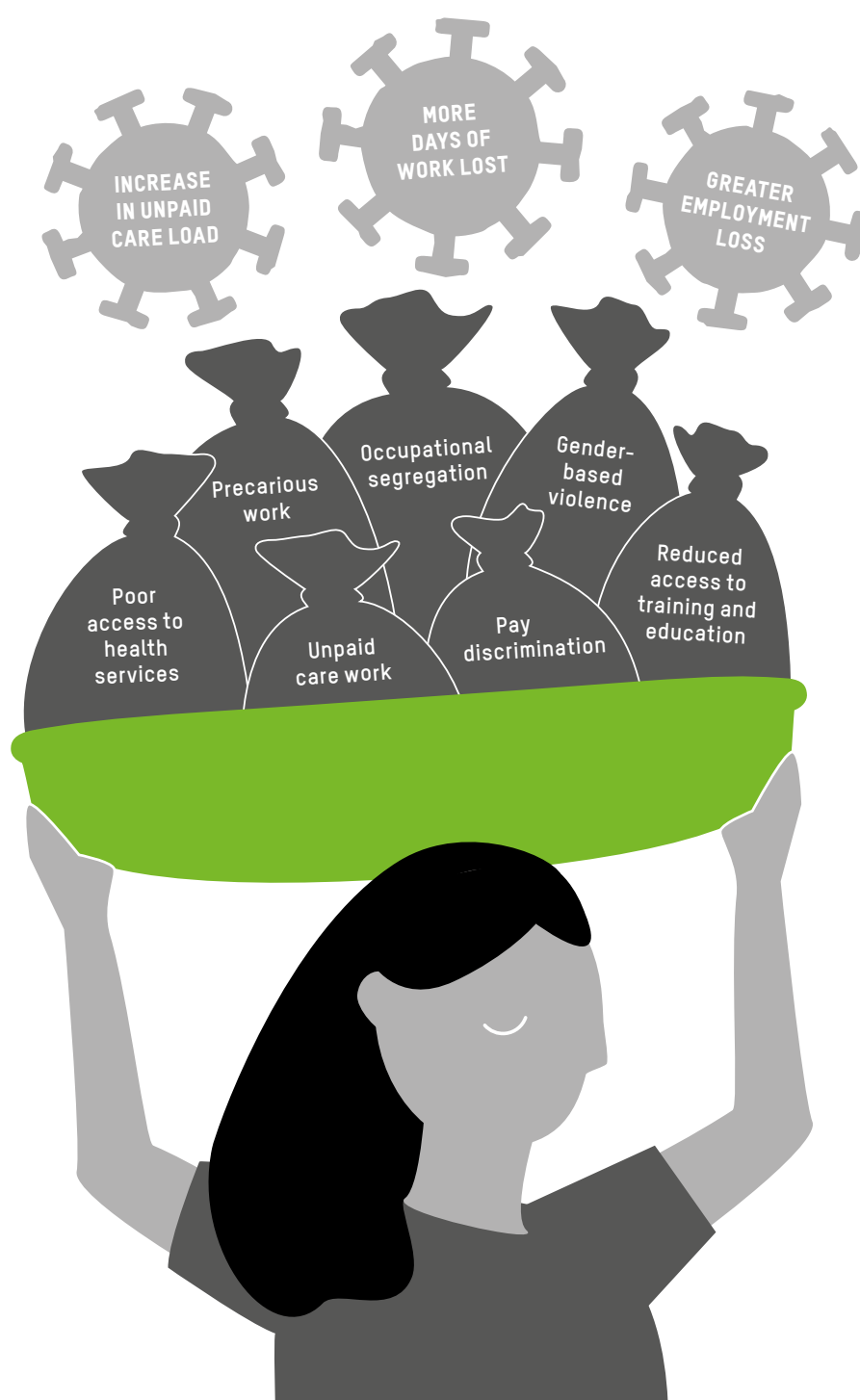
THE FOOD WE BUY IN SUPERMARKETS IS TAINTED BY GENDER INJUSTICE

Women play a central role in global food production. According to a recent UN Women report, women are overrepresented in low-skilled, low-wage jobs at the base of larger supply chains, such as those for clothing or food.⁸⁸ For example, in Assam tea production in India, most women work in the fields, while most men work in the factory and are relatively better off than women workers. In Oxfam's sample, women's reported monthly income was \$51 on average, compared to \$64 for men.⁸⁹

Figure 5 illustrates the main issues affecting women working in global supply chains, and how COVID-19 has exacerbated these.

IN ASSAM TEA PRODUCTION IN INDIA, MOST WOMEN WORK IN THE FIELDS, WHILE MOST MEN WORK IN THE FACTORY AND ARE RELATIVELY BETTER OFF THAN WOMEN WORKERS.

FIGURE 5: ISSUES FACING WOMEN IN GLOBAL SUPPLY CHAINS



A recent ILO publication that analyzes the impact of COVID-19 on the labour market reports that women have been more affected than men by the disruptions:⁹⁰ employment losses for women globally stand at 5%, versus 3.9% for men. Moreover, on average, women spend 3.2 times more hours than men on unpaid care work.⁹¹ With schools closing and family members staying at home during lockdowns, women's care workload has increased, particularly for poorer women who are less able to outsource care responsibilities. Past crises have shown that upon recovery, women have greater difficulty accessing jobs, partially due to gender stereotypes that see men as the principal breadwinners and women as caregivers.⁹² This is illustrated in Oxfam's own research, which shows that women on tea plantations in Assam were more severely impacted than men by the lockdown, losing 45 days' work on average compared to 33 days for men.

Economic inequality exacerbates social inequalities; for example, precarious, low-paid work can keep women trapped in violent relationships or can worsen health inequalities. Unequal treatment leaves women in more vulnerable positions and less able to live independent lives. On tea plantations in Assam, these patterns are passed down through generations, as it is daughters who are expected to help out in the family when their mothers work long days, and no daycare facilities are present.⁹³

Structural barriers mean that women earn lower wages than men; they are less likely to be permanent workers and there is a clear gender division in the allocation of jobs, whereby women usually end up in the lowest-paid roles doing precarious work. These barriers were found across all five commodities that Oxfam studied. On Brazil's coffee plantations, even though women workers were more highly educated than men, they still mostly did field work and earned less than men.⁹⁴ A woman seafood processing worker in Thailand, interviewed by Raks Thai Foundation at the start of the pandemic, recounted that even though her employer recognized that women workers work faster, they were paid by the amount of work completed, whereas male workers were on steady monthly salaries, with health benefits if unwell.⁹⁵ The fact that women are less likely to be permanent workers, and are therefore less likely to receive additional benefits (with less access to insurance and sick leave arrangements and less opportunity to save money), makes them more vulnerable to shocks such as those caused by COVID-19.

**UNEQUAL TREATMENT
LEAVES WOMEN IN
MORE VULNERABLE
POSITIONS AND
LESS ABLE TO LIVE
INDEPENDENT LIVES.**

HOW LOW IS LOW? EVIDENCE OF INADEQUATE WAGES FOR DECENT LIVING

In most of the supply chains studied, workers' average wage was below the national minimum wage. However, even where minimum wages were paid, this was often well below the level of living wages. This is because minimum wages in many countries have remained unrevised through periods of high inflation or were initially set at insufficient levels.⁹⁶

A living wage is defined as the wage 'received for a standard workweek by a worker in a particular place sufficient to afford a decent standard of living for the worker and her or his family'.⁹⁷ A living wage gap is the difference between actual wages and living wages. Earning a living wage is recognized as a fundamental human right.⁹⁸ Yet Oxfam's research found that reaching a decent standard of living is impossible for the workers producing the commodities studied. We now give a short summary of the findings by country (Annex 2 provides more detail on the calculations behind them).

Workers on coffee farms in Brazil

New living wage calculations by Oxfam's partner, the Brazilian Inter-Union Department of Statistics and Socio-Economic Studies (DIEESE), for coffee farm workers in Minas Gerais in Brazil reveal a glaring living wage gap for formal workers of 40%. The calculations⁹⁹ are based on the Brazilian constitutional concept of the 'necessary minimum wage', which is comparable in aspiration to a living wage.¹⁰⁰ This results in a gross monthly living wage figure of \$464 – more than 1.5 times the average actual wage of formal workers, at \$279. The situation is even more dire for informal workers, who earn around 2.3 times less than a living wage, have no access to social benefits or protection, are at risk of losing their job at any moment, and are more vulnerable to exploitation. At the same time, less than 1% of shareholder payouts in 2020 by the eight listed supermarkets Oxfam analyzed (Ahold Delhaize, Albertsons Companies, Costco, Kroger, Morrisons, Sainsbury's, Tesco and Walmart) could pay a living wage for all formal workers in Brazil's largest coffee-producing state.¹⁰¹

Tea workers in Assam, India

Oxfam's research shows that although Assam tea workers earn the minimum wage, this is only a meagre \$2.30 a day.¹⁰² This is far removed from the living wage standard of \$12.15 calculated by Oxfam and partners. Based on its estimation of a living wage, Oxfam established a staggering living wage gap of 81%.¹⁰³

Given their current wages, distant location and lack of integration into the mainstream economy, the tea workers are forced to live in substandard housing, eat food without adequate nutrition and often forgo any recreation. The gap between wages and cost of living results in a high incidence of debt, especially among temporary workers, who make up 61% of the workforce in India's tea industry.¹⁰⁴ The fact that 90% of tea workers rely on the government's subsidized food programme says it all: even with a job, families cannot cope. Therefore, there is a need for appropriate policy measures to bridge the gap between a living wage and prevailing wages in the tea sector in Assam, and efforts are needed from all actors in the supply chain to help increase the wages of the tea plantation workers.

Women farm workers working on wine farms in South Africa

Oxfam's research conducted with its partner non-governmental organization (NGO), Women on Farms Project, in South Africa, shows that women working on wine farms, mostly seasonally, often do not earn enough to provide their families with healthy meals each day. Interviews with 30 women in Western and Northern Cape reveal that they work on a piece-rate system, with unpredictable work schedules and weather conditions, no provision of personal protective equipment (PPE), and subminimum wages.

Comparing the South African minimum monthly wage for farm workers of \$235, calculated in a recent report by the Centre for Research on Multinational Corporations (SOMO),¹⁰⁵ to the Global Living Wage Coalition's living wage benchmark for wine workers in Western Cape of \$286, reveals a living wage gap of 18%. This is likely to underestimate the actual gap, because farm workers often cannot work a guaranteed 21 working days that allows them to even earn the minimum wage.

Rice workers and farmers in Pakistan

In Pakistan, rice workers and small-scale farmers are extremely vulnerable and marginalized.¹⁰⁶ Rice workers only have access to seasonal employment, with very low wages. In the districts of Gujranwala and Sheikhupura in the rice-producing province

* * *

'WE ONLY WORK SEASONALLY, MY MUM AND ME. THE REST OF THE TIME WE SURVIVE ON THE CHILD SUPPORT GRANT FOR THE THREE CHILDREN, \$29 EVERY MONTH FOR EACH CHILD. ON A REGULAR DAY, WE COOK RICE WITH BAKED BEANS, POTATOES OR SOUP. WHEN THERE IS WORK, WE CAN HAVE MEAT, BUT ONLY ON A SUNDAY. WE ONLY EAT VEGETABLES WHEN WE WORK BECAUSE THEY ARE EXPENSIVE. MY MUM EATS LESS SO THE FOOD LASTS, AND SOMETIMES I ALSO EAT LESS.'

* * *

Sophia, a farm worker from Stellenbosch

of Punjab, almost half of all households are female-headed, and women contribute to many physically demanding tasks, especially during the rice planting seasons. Working conditions are harsh. The transplanting of seedlings is mostly done by women, who work for 8–12 hours daily for more than 45 days in extreme temperatures, bare-foot in deep mud and hot water. For small-scale farmers, lack of storage and pressure from middlemen to repay their debts mean that they have to sell their rice immediately upon harvesting, for lower prices than they could obtain later.

Seafood workers in Thailand

Thailand's minimum wage law states that workers must be paid no less than \$10.18 to \$10.90 per day, depending on their location.¹⁰⁷ This minimum wage does not indicate the number of days per month a worker should be employed, leaving workers in a vulnerable position if they are not guaranteed enough days' work each month. New research by Oxfam and partners¹⁰⁸ finds that the actual benchmark for a monthly minimum wage should be the daily wage rate multiplied by 30 days, meaning the monthly benchmark would be between \$305 and \$327.¹⁰⁹ Workers should be able to achieve this monthly wage while also having entitlement to sufficient rest days to ensure a standard work week under Thai labour law (i.e. there should be a maximum number of working days set per month). While this is significantly lower than what could be called a living wage – which is what all workers should receive – this would be an urgent first step to ensuring at least a minimum level of income on which a worker can survive.

Based on surveys conducted by Oxfam and partners among 588 workers, 338 (57.5%) reported that they receive less than the monthly minimum wage (as estimated above). Within this group, 64.1% were women workers.

In conclusion, the findings in all five countries show that, even though a number of supermarkets (including Ahold Delhaize's Dutch subsidiary Albert Heijn, Aldi North and Aldi South, Jumbo, Lidl, Morrisons, PLUS, REWE Group, Sainsbury's and Tesco) have started to make commitments to establishing and closing living wage gaps – some for specific commodities – there are huge issues to resolve in relation to wages.¹¹⁰ For all the commodities Oxfam studied, wages are too low for workers to earn a decent living, representing a violation of workers' rights to an adequate standard of living. Concerted efforts are urgently needed to ensure that the human rights of all workers and small-scale farmers, especially women, in these supply chains are respected.

* * *

'DURING THE TRANSPLANTING WE HAVE MANY HEALTH CHALLENGES SUCH AS ITCHES, JOINT PAIN, FOOT INJURIES, BLOOD LEECHES AND SOMETIMES UNCONSCIOUSNESS DUE TO THE HOT WEATHER. WE SPEND MOST OF OUR INCOME ON HEALTH COSTS. DURING COVID-19, WE WERE JOBLESS FOR A WHILE DUE TO GOVERNMENT RESTRICTIONS, AND FARMERS WERE AFRAID TO HIRE US.'

* * *

Rafia, a seasonal rice worker from Punjab



3. SUPERMARKET SUPPLY CHAINS TAINTED BY RIGHTS VIOLATIONS

While transparency of supply chains is a key first step to help uncover and address human rights violations in supply chains, most supermarkets (with a few exceptions¹¹¹) are still a long way off from publicly disclosing where they source their products from. Through shop visits, in-depth research and asking companies, Oxfam found direct evidence of linkages with many of the global supermarkets ranked in its Supermarket Scorecard for two of the researched commodities: seafood from Thailand and coffee from Brazil.

WIDENING THE CRACKS: WOMEN'S RIGHTS VIOLATIONS IN THAILAND'S SEAFOOD SUPPLY CHAINS

A 2018 Oxfam report based on research on seafood supply chains in Thailand and Indonesia found that exploitation was happening on land as well as at sea. Women peeling shrimp reported excessive working hours, low wages, restrictions on toilet breaks, verbal abuse and hazardous working conditions.¹¹² Workers' surveys in 2020¹¹³ acknowledge significant steps taken by the Thai government and the private sector to improve the situation, but highlight that serious labour violations persist. Workers continue to report issues with their recruitment, contracts, wages and ability to freely organize and collectively bargain.

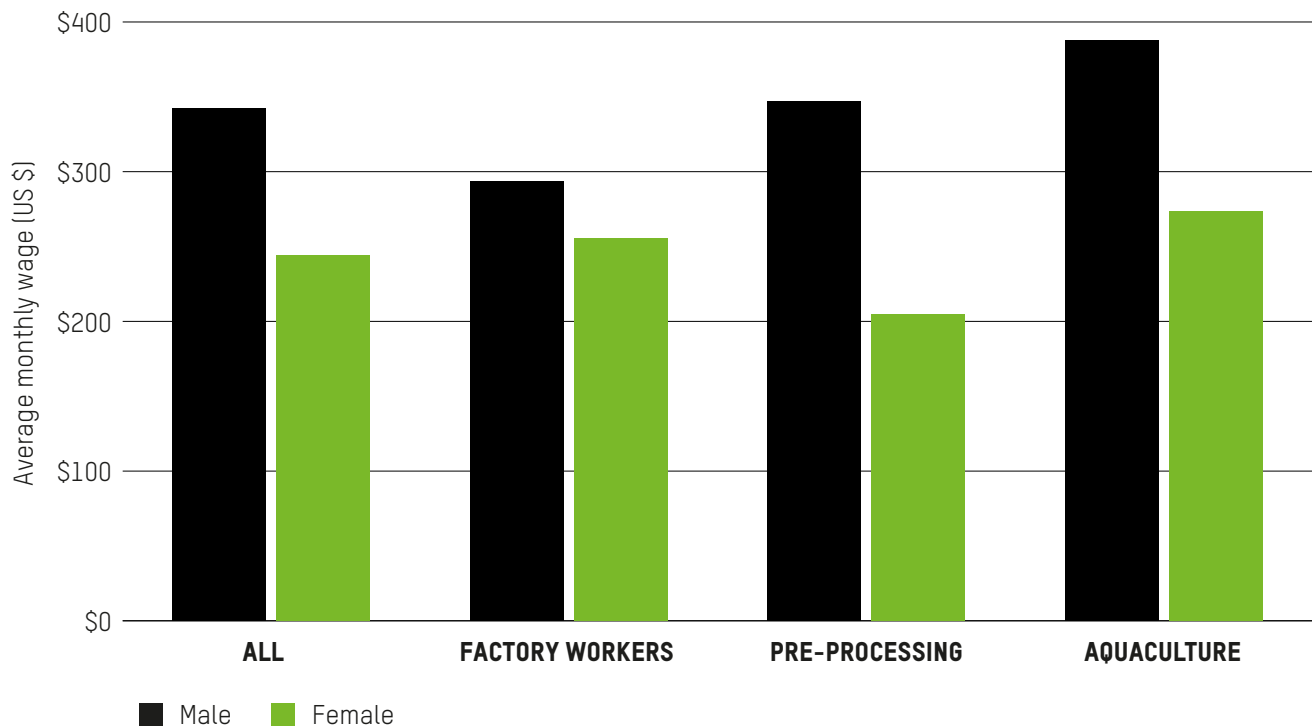
A COVID-19 outbreak in the Thai seafood sector in December 2020 intensified concerns about the treatment of migrant workers, especially by their employers, during the pandemic. Over 50% of approximately 600,000 workers in the Thai fishing and seafood processing sectors were registered migrant workers in 2017.¹¹⁴ The **Thai CSO Coalition for Ethical and Sustainable Seafood** – a consortium of 14 frontline and international organizations, which works directly with migrant workers – highlighted concerns about loss of income, furlough without financial support, overcrowded and unhygienic accommodation, lack of protective gear, insufficient testing requirements, and a rise in hate speech and discrimination against migrant workers.¹¹⁵

**A COVID-19 OUTBREAK
IN THE THAI SEAFOOD
SECTOR IN DECEMBER
2020 INTENSIFIED
CONCERNS ABOUT
THE TREATMENT OF
MIGRANT WORKERS,
ESPECIALLY BY THEIR
EMPLOYERS, DURING
THE PANDEMIC.**

Above: Migrant workers queuing
up for COVID-19 testing, Thailand.
Credit: Patipat Janthong/Oxfam

As Figure 6 shows, new research by Oxfam and the Thai CSO Coalition for Ethical and Sustainable Seafood found that, on average, women workers earn 28.7% less than their male counterparts across different tiers of seafood supply chains in Thailand. Specifically for processing (factory workers), women earn 12.9% less, for pre-processing 41.1% less, and for aquaculture 29.5% less.¹¹⁶

FIGURE 6: GENDER PAY GAP IN THAI SEAFOOD SECTOR



Note: Based on a survey of 435 workers

COVID-19 pushes workers further into poverty

Low and insecure incomes, exacerbated by COVID-19, have led to poor living conditions for workers in the seafood sector. Some told Oxfam and partners that due to their reduced income during lockdown, they had to move out and share accommodation with relatives, which made it harder to quarantine (see Box 1).

BOX 1: IMPACTS OF COVID-19 ON WOMAN MIGRANT WORKER IN THAI FISH INDUSTRY

Chesa, a migrant worker from Myanmar, works as a fish filleter. She told Oxfam and partners that her main problems are lack of employment and money:

'We need to send remittances to our children every month. It makes me feel heavy-hearted since I have nothing to send them. They keep saying the money has run out and ask me to send them some. I have to tell them to wait a bit more. We fear COVID-19. We fear that once we catch it, people will loathe us.'

Chesa explained that she could no longer afford her usual accommodation, as her income reduced by half during the second COVID-19 surge. She had to move in with relatives, and was sharing her accommodation with seven other people.

In in-depth interviews conducted by Oxfam and partners, 8 out of 21 respondents said they were asked to stop working, without financial support, during a COVID-19 outbreak in Samut Sakhon in January 2021, while 6 out of 21 interviewees said their working hours had been significantly reduced. Soe, a factory worker for export markets, told the research team that her company stopped production for over a month during the pandemic and provided no support:

'I normally earn \$130 to \$146 per 15 days.¹¹⁷ There has been little work to do lately, and I earn \$19.50 to \$26 per 15 days.¹¹⁸ Luckily my husband still works at a nearby factory and that's how we manage to buy food. Why are some workers allowed to return to their work, but we are not?'

These testimonies show how crises such as the one caused by COVID-19 have the potential to exacerbate poverty and insecurity for workers who are not guaranteed a monthly minimum wage, like the majority of those who responded to the survey conducted by Oxfam and partners in Thailand.

The following supermarkets either confirmed or did not deny that they source Thai shrimp, tuna or pet food from suppliers where Oxfam and partners found cases of workers being paid less than the monthly minimum wage:

TABLE 2

CONFIRMED	DID NOT DENY
<p>Ahold Delhaize</p> <p>Asda*</p> <p>Costco</p> <p>Lidl*</p> <p>Sainsbury's*</p> <p>Tesco*</p>	<p>Walmart</p>

*For these companies Oxfam did not find its own evidence, but companies shared the information upon Oxfam's request.

BRAZILIAN COFFEE PRODUCTION STAINED BY INEQUALITY AND SLAVE-LIKE CONDITIONS

Brazil is the world's largest coffee producer, accounting for about one-third of global production in 2018.¹¹⁹ Oxfam, together with Repórter Brasil and DIEESE, conducted new research into coffee production in Minas Gerais, the largest coffee-producing state. The findings reveal that gender inequality is deeply engrained in Brazil's coffee industry – and that the sector remains riddled with accounts of slavery-like conditions.

Gender inequality

Oxfam's study found that women constituted about 16% of the formal labour force in coffee production in Minas Gerais in 2019, and that men's real average income in coffee was 16.2% higher than that of women.¹²⁰ This is due to women earning less than men in the same jobs, and women lacking access to the higher-paid jobs such as tractor driver, supervisor or administrative worker. This is despite the fact that the women in Oxfam's study were better educated; Oxfam found that 14% of the women workers had attended (but not always completed) higher education, compared to just 4% of the men.¹²¹

Oxfam also found gender discrimination in relation to job security: in 2017, 76% of women working in agriculture in Brazil did so as informal workers, compared to 67% of men. Women workers remain in their jobs for even shorter periods than men. In 2019, 27.2% of male coffee workers had been in their jobs for less than 12 months on average, while for women the figure was 34.6%.¹²² Women in informal jobs earned only 73% of what men – also working informally – earned.¹²³

Slavery-like conditions in coffee production – and links to supermarkets

Oxfam's new research builds on numerous earlier reports about working conditions equivalent to slavery in the Brazilian coffee industry (see Box 2 for definitions of modern slavery).¹²⁴ These point to labour rights issues ranging from precarious work and workers paid below the minimum wage, to forced labour, overtime hours, debt bondage and degrading working conditions.¹²⁵

Below: Júlia (not real name), 60, is the mother of four sons who were rescued in conditions similar to slavery on coffee farms. She lived a lot of anguish. Two sons were rescued last year amid the Covid-19 pandemic working without any kind of protection against the virus. The two young men experienced hunger, cold and risk of contamination by toxic substances. For the mother, the youths reported being afraid of being killed if they tried to leave. Julia is poor, illiterate, and had no money to help her sons. She spent sleepless nights and took anxiety medication. Credit: Tatiana Cardeal/Oxfam Brasil.



BOX 2: MODERN SLAVERY DEFINITION

According to the NGO Anti-Slavery International, ‘Modern slavery is the severe exploitation of other people for personal or commercial gain. Modern slavery is all around us, but often just out of sight. From the outside, it can look like a normal job. But people are being controlled – they can face violence or threats, be forced into inescapable debt, or have had their passport taken away and are being threatened with deportation. Many have fallen into this oppressive trap simply because they were trying to escape poverty or insecurity, improve their lives and support their families. Now, they can’t leave.’¹²⁶

Brazilian penal law defines ‘work in conditions equivalent to slavery’ to include exhausting working days and degrading working conditions, in addition to forced labour and restriction of movement.¹²⁷

In 2003, the Brazilian government introduced the ‘Dirty List’ as a way to combat modern slavery.¹²⁸ The list is published at least once every six months and coffee farm owners often appear on the list, with an average of 25 government investigations per year since 2014.¹²⁹ Owners of several farms have been fined for keeping workers in slave-like conditions, and workers have been rescued (see Box 3). Farm owners are placed on the list for two years, after which they are removed if no further violations are discovered.¹³⁰ Oxfam’s research shows that, through complex supply chains, some of the coffee farms whose owners are on the Dirty List are connected to supermarket supply chains.¹³¹

OWNERS OF SEVERAL FARMS HAVE BEEN FINED FOR KEEPING WORKERS IN SLAVE-LIKE CONDITIONS.

The following supermarkets confirmed that they source or have sourced, directly or indirectly, products from one or more of the exporters who are currently (or were in the recent past) involved with farms that are included on the Dirty List and studied in Oxfam’s research:¹³²

TABLE 3

CONFIRMED	DID NOT DENY
Ahold Delhaize Aldi North Aldi South Asda Jumbo Kroger Lidl PLUS REWE Group	Costco Edeka

BOX 3: SLAVE-LIKE CONDITIONS IN BRAZILIAN COFFEE PRODUCTION

Maria, a seasonal coffee worker in Minas Gerais, told Oxfam that she has had to migrate within the province throughout her life to find ways to make a living. As a result, her 15-year-old daughter Lucia sometimes has to switch schools twice a year and is unable to go to school at all for certain periods. Maria was found working in slave-like conditions at one of the farms whose owner appears on the Dirty List:

‘I had to work long days, from 5 am to 6 pm, even on rainy days, with the risk of being bitten by snakes and without access to a toilet. I received no protective gear, I needed to buy all the protective equipment myself.’ Her daughter added: ‘All the money my mother earns has to be spent on buying food.’

Felipe is one of nine workers rescued from a situation equivalent to slavery at a coffee farm in 2020, during the COVID-19 pandemic. He told Oxfam that together with one colleague, he had to harvest 42 bags of coffee (2,5 tonnes) a day without receiving a salary. At best he would receive \$36 for two weeks’ work, which amounted to the money left after the boss had deducted the rent, food and equipment used during work: *‘When I started the job, I already owed the boss money’.*

Complexity requires deep engagement and supermarkets need to step up

The Dirty List has great potential to be a warning mechanism for the entire coffee industry. It has an important function in signalling labour rights violations, but supermarkets should not just use the list to cut links and run. Instead, much deeper engagement is required.

The Brazilian coffee supply chain is long and complex. Supermarkets buy coffee from processors who buy from exporters, who in turn source from cooperatives or other intermediaries that gather beans from several farms. The complexity of these tiers makes it hard to know whether coffee is free from human rights violations. In Brazil, and specifically in Minas Gerais, we find some of the largest coffee cooperatives in the world, with up to 12,000 members, from small to large producers. Supermarkets should increase due diligence that includes having multiple verification points for information that has been provided to them. For instance, several supermarkets told Oxfam that a cooperative to which they are linked has denied sourcing from farms that were included in the Dirty List. Yet Oxfam has convincing evidence – from statements in court, as well as from a recent government investigation – that at least two farmers that supply or used to supply coffee to the cooperative in question are on the Dirty List. Another cooperative claimed that while conditions equivalent to slavery were established on the land of one of their members, this land was leased out to another farmer, not the cooperative member. Performing due diligence along these supply chains is complicated, and supermarkets need to engage deeply to uncover hidden human rights violations and ensure that any they find are stopped.

Once a farm is included in the Dirty List, the violation has already occurred, so adopting a human rights due diligence approach is about more than just cutting links with any farms on the Dirty List. The fact that some owners of coffee farms appear on the Dirty List on a regular basis should be a reason for supermarkets to engage directly with Brazilian coffee cooperatives and workers’ organizations on the ground to improve policies and practices in the cooperatives and farms. Most companies in the supply chain, including coffee cooperatives, have policies of zero tolerance with forced labour, but it is not clear how they implement these in a way that actually helps to address the underlying issues. As the Brazilian government

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Worker handles coffee beans. Credit: Tatiana Cardeal/Oxfam Brasil

reduced the budget for combating forced labour by 40% in 2020,¹³³ jeopardizing the effectiveness of the Dirty List, supermarkets will need to step up to improve their efforts in this area.

According to the ILO, the COVID-19 crisis is increasing the pool of workers that are vulnerable to forced labour, and is worsening work situations that are already exploitative.¹³⁴ Workers who lost their jobs during the pandemic, who still need to support their family, are more likely to get loans from predatory lenders, which can lead them into situations of forced labour until their debts are paid off. While modern slavery legislation has helped to generate momentum among companies, progress continues to be slow. In the US, the California Transparency in Supply Chains Act requires retailers in the state to publicly disclose their efforts to eradicate slavery from their supply chains, while the UK's Modern Slavery Act (2015) requires companies to take steps to identify and address modern slavery risks in their supply chains.¹³⁵ The European Commission is currently preparing legislation on sustainable corporate governance that will introduce mandatory human rights due diligence to hold companies to account for their social and environmental impacts.¹³⁶ Many supermarkets which are connected to coffee farms on the Dirty List have a responsibility under these laws to declare what steps they take to ensure they adopt effective approaches to eradicate forced labour from their supply chains.

MANY SUPERMARKETS WHICH ARE CONNECTED TO COFFEE FARMS ON THE DIRTY LIST HAVE A RESPONSIBILITY UNDER THESE LAWS TO DECLARE WHAT STEPS THEY TAKE TO ENSURE THEY ADOPT EFFECTIVE APPROACHES TO ERADICATE FORCED LABOUR FROM THEIR SUPPLY CHAINS.

4. TIME TO CLOSE THE GAPS BETWEEN POLICY AND IMPLEMENTATION

SUPERMARKETS NEED TO ADDRESS THEIR BLIND SPOTS

Businesses that source their products worldwide are expected to respect the United Nations (UN) Guiding Principles on Business and Human Rights and contribute to the UN Sustainable Development Goals (SDGs) and the Decent Work agenda. Supermarkets should address the discrimination and rights violations of women workers in their supply chains as a matter of urgency, and give women workers more voice and greater income security.

For women, their families and communities, their future depends on decent jobs – and it is also the right thing to do. For businesses, these measures will also strengthen the resilience of their supply chains in the long term. The positive effects of ensuring workers' satisfaction and diversity have been widely documented:¹³⁷ in an environment where all workers and small-scale producers can thrive, stability and quality of supplies is better guaranteed, and better business decisions are taken along the chain when women and men form mixed teams. When women come into higher positions and are better paid, they have more childcare options and children can be schooled, leading to a more skilled workforce in the future.

* * *

**FOR WOMEN,
THEIR FAMILIES
AND COMMUNITIES,
THEIR FUTURE
DEPENDS ON
DECENT JOBS.**

* * *

STILL THE WEAKEST LINK: WOMEN'S RIGHTS

















Until now, supermarkets have failed to take adequate action to address the labour rights issues faced by women in supply chains. In response to Oxfam's previous calls¹³⁸ on supermarkets to ensure respect for workers' rights, some progress has been made. Ahold Delhaize's Dutch subsidiary Albert Heijn, Jumbo and Lidl took significant steps to set up a human rights due diligence approach.¹³⁹ Six supermarkets (Aldi South, Jumbo, Lidl, Morrisons, REWE Group and Tesco) increased their score on workers' rights in Oxfam's Supermarket Scorecard by 25% points or more between June 2018 and June 2020. Others made incremental progress: around half of the supermarkets on the scorecard have committed to take proactive steps to prevent forced labour, committed not to 'cut and run' when issues are exposed, and publicly acknowledged that problems are systemic and require collaboration to solve.¹⁴⁰ However, all supermarkets' scores remain insufficient to adequately address human rights issues in their supply chains (Figure 7).

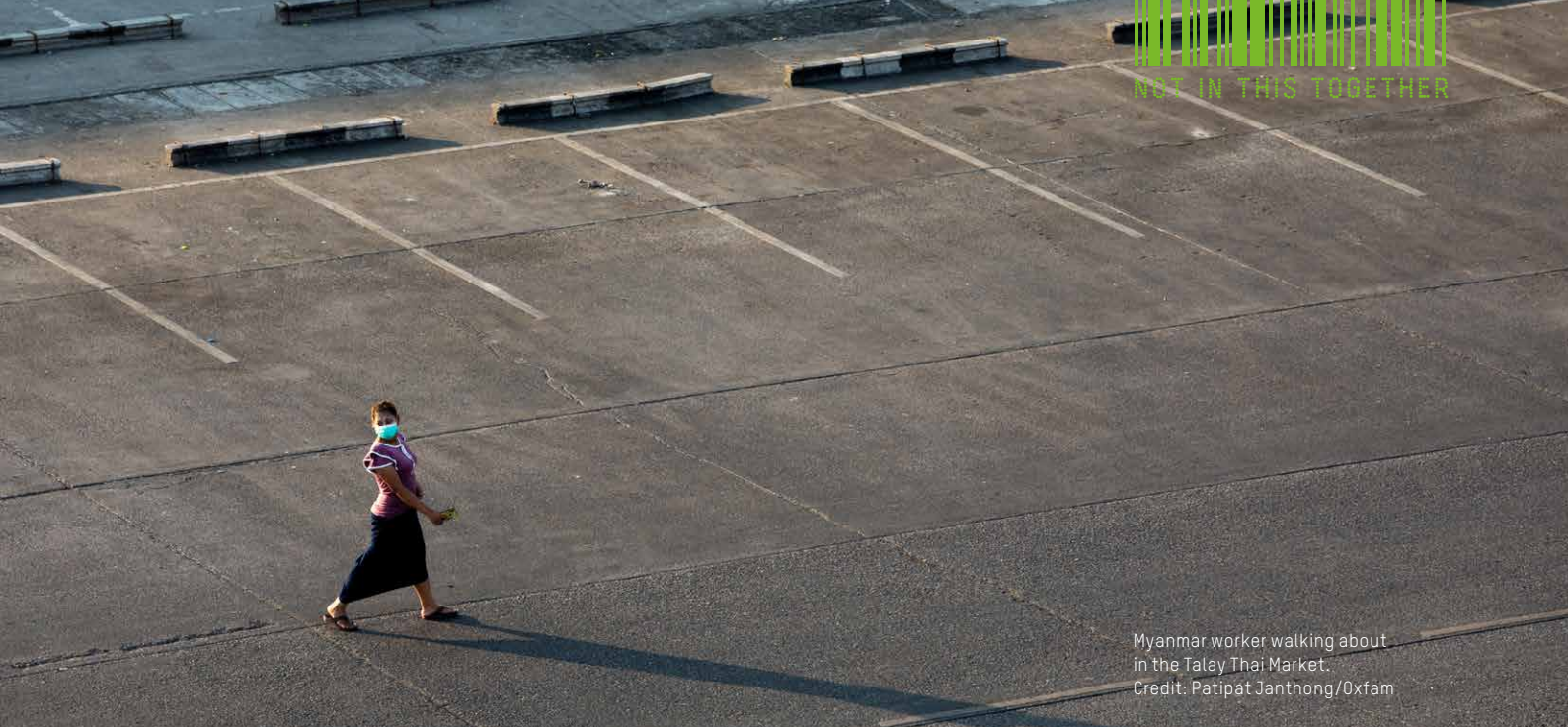
While in 2020, supermarkets are still scoring low across the board on Oxfam's global Supermarket Scorecard, gender is the theme where we see the greatest need for improvement. **Of the 16 supermarkets assessed, 11 score well below 20%, with six scoring 0%: Albertsons Companies, Costco, Edeka, Kroger, Whole Foods and PLUS.** Many supermarkets are turning a blind eye to women's issues in their supply chains and lack systems to address women's rights violations. Transparency is greatly lacking: none of the supermarkets are systematically tracking and disclosing gender-disaggregated data along their supply chains.

FIGURE 7: OXFAM'S
SUPERMARKET
SCORECARD 2020

DOES YOUR SUPERMARKET FOOD CONTAIN HUMAN SUFFERING?

We analysed these leading supermarkets' policies and practices on human rights in their supply chains. We asked whether supermarkets are transparent and accountable in the ways they ensure that workers' rights are respected, small-scale farmers are prosperous and the women who produce our food are treated fairly.

SUPERMARKET	TRANSPARENCY & ACCOUNTABILITY	WORKERS	SMALL-SCALE FARMERS	WOMEN	TOTAL SCORE
	50%	67%	25%	43%	46%
	42%	54%	50%	29%	44%
	38%	54%	17%	24%	33%
	40%	38%	25%	24%	32%
	38%	25%	21%	33%	29%
	31%	35%	21%	10%	25%
	29%	25%	33%	10%	25%
	33%	29%	13%	14%	23%
	25%	19%	21%	10%	19%
	29%	13%	21%	10%	18%
	10%	25%	13%	0%	12%
	13%	13%	8%	0%	9%
	6%	17%	8%	0%	8%
	8%	13%	4%	0%	6%
	8%	8%	4%	0%	5%
	0%	8%	4%	0%	3%



The increased number of supermarkets signing up to the Women's Empowerment Principles (WEP) is encouraging, as it signals high-level recognition of the issue;¹⁴¹ however, supermarkets do not report on how they comply with the WEP.

It is high time that we started to see companies addressing the challenges faced by the women producing our food. First steps to do so have been taken, most noticeably by Tesco and Walmart, earning them scores of 43% and 33% respectively, against Oxfam's measures of good practice. Tesco and REWE Group are the only supermarkets to have published a gender policy,¹⁴² Tesco's gender policy outlines actions it will take in four priority sectors, including addressing sexual harassment, giving women greater access to gender-sensitive grievance mechanisms, and increasing women's participation in workers' committees. Aldi North, Aldi South and Lidl have committed to publishing a gender policy. Tesco is also the only supermarket to collaborate in various multi-stakeholder initiatives to understand and address the position of women. It promises to track the gender profile of three high-risk food supply chains, a commitment also made by Sainsbury's and Morrisons.

Walmart has demonstrated good practice in other areas. It is a vocal advocate for gender equality at the corporate level and the only supermarket on Oxfam's scorecard both to commit to sourcing from women-owned businesses and to reporting action taken on this.¹⁴³ Walmart and Tesco, as well as Lidl and REWE Group, have published examples of how they support suppliers to address the root causes of gender inequality.

Eight companies – Aldi North, Aldi South, Jumbo, Kroger, Lidl, Morrisons, Sainsbury's and Tesco – have committed to undertake human rights impact assessments that address gender equality.

Regulation is also driving change. Gender pay gap legislation in the UK has made all companies more aware of shortcomings, while upcoming national legislation in the Netherlands and Germany¹⁴⁴ will incentivize companies to attract more women into higher positions in their own operations. Beyond corporate headquarters, the upcoming human rights due diligence legislation in Europe should provide a legal framework for companies to respect women's human rights.

While the first steps taken by some supermarkets are welcome, it is clear that all supermarkets need to do much more to ensure that the rights of women in their supply chains are respected, and that these women get their fair share of the value they create.

* * *

**IT IS HIGH TIME THAT
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* * *

5. A ROADMAP TOWARDS EMPOWERING WOMEN IN SUPPLY CHAINS

A FUNDAMENTAL SHIFT TOWARDS A GENDER-JUST BUSINESS MODEL

'Supermarkets are at a crucial juncture: they can act to improve and ultimately respect the rights of women across their supply chains or continue to squeeze value out for the benefit of shareholders and those at the top. Progress is possible – if we are ready to reform today's unjust and unequal global retail business for the better.' Gabriela Bucher, Oxfam International Executive Director

The pandemic has revealed that supermarkets have put profits and shareholders before the safety and well-being of workers and small-scale farmers in their supply chains. Women have been hit the hardest as they are found in the most insecure and lowest-paid jobs. Oxfam is calling on supermarkets and governments to address the shortcomings of the current model and build a new, better global retail business model that has at its heart the interests of workers and small-scale farmers, especially women, and their communities.



Safina Bibi checks on her rice field in Gujranwala, Pakistan.
Credit: Mahed Ali/Oxfam Pakistan

SUPERMARKETS SHOULD TAKE THE FOLLOWING ACTIONS:

1. IN RESPONSE TO COVID-19, SUPERMARKETS SHOULD IMMEDIATELY:

- Ensure, through supplier codes of conduct, that workers in their supply chains are provided with all the necessary Personal Protective Equipment to protect themselves from COVID-19, free of cost. They should help their suppliers to provide adequate self-isolation and social distancing instructions in workers' own language and to cater for the specific needs of women workers.
- Refrain from 'cutting and running' if there is a supply chain disruption due to COVID-19, and commit to providing funding to support suppliers to cope with the pandemic.
- Update their relevant policies and practices to reflect the emerging risks and challenges posed by COVID-19 to their global suppliers in terms of protecting their workforce, especially those most vulnerable in the supply chains, such as informal workers who are predominantly women – for instance, by ensuring adequate hazard pay and sick pay as part of contracts for workers in supply chains.

2. END VIOLATIONS OF HUMAN RIGHTS AND WORKERS' RIGHTS IN SUPPLY CHAINS

Since Oxfam's international campaign to end exploitation in supermarket supply chains began, we have been calling on supermarkets to:¹⁴⁵

- **Adopt a human rights due diligence approach** by setting up a system to identify the key problems in high-risk food supply chains and formulate a robust strategy to prevent, mitigate and remediate human rights violations. This includes: publishing a labour and human rights policy that includes zero tolerance for inaction on forced and child labour; carrying out and publishing a mapping of risks across all supply chains; human rights impact assessments for at least three high-risk products a year; and publishing action plans to address the risks identified.
- **Prevent human rights harms in supply chains.** This includes: publishing first- and second-tier suppliers; establishing an effective grievance mechanism; and supporting the right of workers to organize and having regular and meaningful engagement with trade unions.
- **Improve the rights of workers and small-scale farmers in supply chains,** prioritize suppliers that give greater voice, power and value to workers (and farmers), and commit to achieving a living wage or income in at least three high-risk human rights supply chains.

3. ADDRESS VIOLATIONS OF WOMEN'S RIGHTS IN SUPPLY CHAINS

Based on Oxfam's new analysis as well as interviews with women workers and small-scale farmers and women's rights organizations, supermarkets need to significantly invest in their policies and practices to address women's rights violations in global supply chains.

They must gain a full understanding of the roles women workers and farmers play and the issues they face. These include the work they do, their employment status and levels of pay, and discrimination in the workplace. They also include a better understanding of how women can combine their work with caring responsibilities, and any specific healthcare needs.

Supermarkets should publish a **comprehensive gender policy** that contains commitments to:

- Track and publish gender-disaggregated data in high-risk supply chains, including on wages.
- Achieve meaningful progress in closing the gender pay gap, starting with three high-risk supply chains.
- Conduct and publish human rights impact assessments using a gender lens.
- Understand issues of gender discrimination and formulate action plans to tackle them.
- Provide incentives for fairer pay and more secure employment for women.
- Remove barriers to women's representation and support their ability to join trade unions.
- Ensure access to a gender-sensitive grievance mechanism.
- Support suppliers to adopt policies and contractual benefits that ensure women have access to healthcare and opportunities to fulfil or outsource their care responsibilities.

For more information, see Oxfam's Recommendations for Food Retailers to Address Gender Inequality in Global Supply Chains.¹⁴⁶

4. SHIFT CORPORATE PRACTICE ON SHAREHOLDER PAYOUTS AND SUPPLY CHAIN INVESTMENT

To prevent supermarkets from prioritizing short-term shareholders' interests above respect for human rights and workers' rights, and above the interests of stakeholders in supply chains, supermarkets should:

- **Introduce a cap on dividends paid out to shareholders, and ensure that profits are used to pay for social, environmental and climate change impacts linked to the company.** These include: the costs of ensuring living wages and incomes for workers and farmers in supply chains; costs of setting up a human rights due diligence process; and adopting a gender policy and action plan as outlined in this report.
- **Invest to build fairer and more resilient supply chains.** Supermarkets should retain future earnings and allocate adequate financial resources to ensure that workers and farmers in global supply chains receive a fair share of the value created. This should be done in close coordination and partnership with their suppliers.

GOVERNMENTS SHOULD TAKE THE FOLLOWING ACTIONS:

Government action is critical to end the violation of human rights, workers' rights and rights of women in global supply chains, as outlined in the first pillar of the UN Guiding Principles on Business and Human Rights, which describes states' duty to protect human rights. Governments should:

- Repeal laws that hinder or prevent women's economic equality and implement legislation to support women's rights.
- Guarantee that legislation is in place and enforced to set a statutory minimum wage that ensures a living wage for workers, based on the cost of living and developed in consultation with trade unions, women's rights organizations and other national stakeholders. This should be adjusted annually for inflation.
- Introduce legislation, as is being proposed by the European Parliament in the European Union, requiring companies to carry out human rights due diligence in their global value chains (in line with the UN Guiding Principles on Business and Human Rights, the OECD Guidelines for Multinational Enterprises, and OECD Due Diligence Guidance for Responsible Business Conduct), ensuring that it is adequately enforced. The legislation should extend the liability of companies for harm to human rights occurring in their supply chain to situations where they fail to meet their due diligence obligations. It should also ensure access to justice for people whose rights have been violated, in particular women.
- Introduce and implement binding legislation to cap dividends and payouts that prioritize short-term shareholder benefits over paying living wages or fair prices to workers and small-scale farmers in supply chains, and over actions to address climate change.

GOVERNMENT ACTION IS CRITICAL TO END THE VIOLATION OF HUMAN RIGHTS, WORKERS' RIGHTS AND RIGHTS OF WOMEN IN GLOBAL SUPPLY CHAINS.



Fertilizer application in coffee plantation in Southern Minas Gerais State, Brazil. Credit: Tatiana Cardeal/Oxfam Brasil

ANNEX 1

SUPERMARKETS' REPORTED COVID-19-RELATED COSTS (IN \$) DURING Q2 TO Q4 OF 2020

- **Ahold Delhaize (\$777m)** – additional safety measures, enhanced associate pay and benefits, and significant charitable donations.¹⁴⁷
- **Albertsons Companies (\$1bn)** – support and protection for frontline workers and customers, including contributions to hunger relief in their communities.¹⁴⁸
- **Costco (\$776m)** – incremental wage and sanitation costs.¹⁴⁹
- **Kroger (\$2.56bn)** – investment to support and safeguard associates, customers and communities, including temporary hazard pay and commitments to secure pensions for frontline workers.¹⁵⁰
- **Morrisons (\$372m)** – extra staff bonuses, safeguards for workers and customers.¹⁵¹
- **Sainsbury's (\$623m)** – higher absence costs, pay for vulnerable colleagues and frontline colleague bonus, other COVID-19-related items such as protection measures, distribution costs, reduced rental income and others.¹⁵²
- **Tesco UK (\$1.15bn)*** – higher payroll costs due to staff absence/backfill/ additional staff, pay for vulnerable colleagues, distribution costs, property costs, frontline workers' bonuses, other incremental costs.¹⁵³
- **Walmart (\$4.1bn)** – special cash bonuses to frontline workers in the US.¹⁵⁴

*These represent Tesco UK's incremental costs for their 2020/21 financial year, March 2020–February 2021.

ANNEX 2

LIVING WAGE CALCULATIONS

BRAZIL

A study into the living wage gap for the coffee-producing municipality of Três Pontas in Minas Gerais was commissioned by Oxfam and conducted by the Brazilian Inter-Union Department of Statistics and Socio-Economic Studies (DIEESE) in December 2020. The calculations made by DIEESE are based on the Brazilian constitutional concept of the ‘necessary minimum wage’. This is not to be confused with the official Brazilian minimum wage, but can rather be seen as a constitutional reference to the need for wages to cover workers’ basic needs. It is comparable, in aspiration, to a living wage.

According to the 1988 Federal Constitution, the ‘living wage’ should cover the costs of food, clothing, housing, education, healthcare, leisure, and transportation to and from the workplace for workers and their families. DIEESE’s calculation indicates that this gross living wage should be a monthly \$464 (see Table A1). On average, formal workers in Brazilian coffee production earn 60% of this living wage, meaning there is a living wage gap of 40%. For informal workers, this gap would be a lot greater, at 58%, but the issues facing informal workers are larger than just income, as they do not build up social protection (health insurance and pensions, for example) and are at increased risk of exploitation due to the nature of their employment.

TABLE A1: LIVING WAGE LADDER FOR COFFEE WORKERS IN BRAZIL

	MONTHLY WAGE (BRAZILIAN REAIS)	MONTHLY WAGE (\$)
Official minimum wage of Brazil	R\$1,045	\$187
Average wage for informal coffee workers in Minas Gerais	R\$1,093	\$195
Average wage for formal coffee workers in Minas Gerais	R\$1,560	\$279
Gross Anker Methodology living wage (2015, with inflation correction)	R\$2,225	\$397
Gross DIEESE living wage	R\$2,600	\$464

Source: DIEESE 2020, based on RAIS database and Global Living Wage Coalition Living Wage Report Minas Gerais 2016, corrected for inflation based on IBGE’s INPC-B.

INDIA

The daily minimum wage of a tea worker set by the Assam state government at the time of Oxfam's research at the end of 2020 was \$2.30.¹⁵⁵

Through a survey of 4,909 tea workers on different estates across seven districts in Assam, Oxfam estimated the daily living wage for tea plantation workers. The calculations are based on a standard family of four. Oxfam estimated the daily living wage for workers in Assam to be \$12.15¹⁵⁶ in the case that all living expenses need to be covered by the workers.¹⁵⁷ This should be looked at as the net take-home pay in case the tea owners are unable to provide decent living conditions for the workers at the plantation site as required under India's Plantations Labour Act.¹⁵⁸ When comparing the daily wage of a tea worker to the living wage, this shows a staggering living wage gap of 81%.

The living wage estimated by Oxfam should enable tea plantation workers to afford a basic but decent living standard in Assam. Oxfam's calculations are based on rulings in three landmark judgements of the Supreme Court of India, one of which asserts that 'the wage structure can be divided into three categories: the basic "minimum wage", which provides bare subsistence and is at poverty line level, a little above is the "fair wage" and finally the "living wage," which comes at a comfort level.'¹⁵⁹

Oxfam also compared the living wage benchmark of \$12.15 it calculated to the minimum wage for Assam suggested by an expert committee advising the Indian government at the request of the Ministry of Labour and Employment.¹⁶⁰ This committee, commonly referred to as the Anoop Satpathy Committee (named after its chairman), calculated the minimum wage to be \$4.70 in 2019. Even if the Assam state government would follow this advice, the living wage gap would still be 61%, compared to the living wage calculated by Oxfam.

SOUTH AFRICA

In a recent publication, the Centre for Research on Multinational Corporations (SOMO) reported that 'as of 1 January 2019, the minimum wage for farm workers is set at \$1.20 per hour. For farm workers, for whom a 9-hour workday is the norm, this translates into \$10.84 per day and \$234.70 per month. The minimum wage for farm workers is below the minimum wage of \$1.34 per hour that applies to all other sectors.'¹⁶¹ This calculation is based on the premise (often not the reality) that a worker has a permanent job, ensuring at least 21 working days a month and nine working hours a day. Even then, the monthly wage is well below the living wage of \$286.26 calculated and published by the Global Living Wage Coalition (GLWC) in May 2019.¹⁶²

PAKISTAN

Oxfam's research, conducted in partnership with the NGO Awareness on Gender and Human Empowerment (AGAHE), collected anecdotal evidence that men's daily income is approximately \$2.86 on average, while women typically earn between \$0.95 and \$1.27 per day. These amounts are much lower than the minimum daily wage rate set by Pakistan's government, at \$4.56 per day. The gross living wage calculated by Wageindicator.org for Pakistan in September 2019 is much higher still, at \$6.25 to \$8.30.¹⁶³ This gives an indication that wages earned in seasonal rice production are too low to provide for a decent livelihood for rice workers and their families.

THAILAND

During November and December 2020, Oxfam and partners surveyed 588 workers (317 men and 271 women)¹⁶⁴ across four tiers of the fish and seafood supply chain (fishing, pre-processing,¹⁶⁵ seafood processing and shrimp farms). During a COVID-19 outbreak in January 2021, Oxfam and partners also conducted in-depth interviews with 21 fishery and seafood workers in Samut Sakhon, a large seafood port near Bangkok, to assess the immediate impacts of the pandemic on seafood workers. No new living wage benchmark was calculated in the Thai research. The main issue raised was the fact that the legal minimum wage is a daily wage. This assumes that workers can work enough days a month to ensure a decent living, which is not always the case at all in the seafood industry, as the new research by Oxfam and partners also shows. Therefore, Oxfam and partners recommend the use of a benchmark for a monthly minimum wage, rather than a daily wage.

NOTES

- 1 ILO monitor 7th edition. (2021, January 25). *ILO: Uncertain and uneven recovery expected following unprecedented labour market crisis*. Retrieved from: https://www.ilo.org/global/about-the-ilo/newsroom/news/WCMS_766949/lang--en/index.htm
- 2 B. Marlow. (2021, January 5). *Supermarkets will be lockdown winners yet again. The Telegraph*. Retrieved from: <https://www.telegraph.co.uk/business/2021/01/05/supermarkets-will-lockdown-winners-yet/>
- 3 Oxfam acknowledges that supermarkets' share ownership also includes ordinary citizens who might benefit from higher supermarket profits. However, share ownership is skewed towards higher-income groups. For example, in the US, the wealthiest 10% of Americans now own 89% of all stocks, while the poorest 50% of Americans don't own even 1% of company equities (see: *Federal Reserve Distributional Financial Accounts, Distribution of Household Wealth in the US since 1989*, retrieved from: <https://www.federalreserve.gov/default.htm>). In the UK, the wealthiest 10% own 46% of all pension wealth, while the poorest 10% own less than 1% (<https://highpaycentre.org/how-the-shareholder-first-business-model-contributes-to-poverty-inequality-and-climate-change/>).
- 4 Based on Oxfam's calculations. Please see the calculations spreadsheet accompanying the Methodology note that will be published alongside this report.
- 5 ILO. (2021, March 29). *How women are being left behind in the quest for decent work for all*. Retrieved from: <https://ilostat.ilo.org/how-women-are-being-left-behind-in-the-quest-for-decent-work-for-all/>
- 6 All names of workers quoted in this report have been changed to protect their identities.
- 7 Oxfam. (2021). *Behind the Barcodes Supermarket Scorecard*. Retrieved from: <https://www.behindtheprice.org/en/>
- 8 Based on Oxfam's calculations. Refer to the Methodology note for more information.
- 9 These include: Ahold Delhaize in the Netherlands; Albertsons Companies, Costco, Kroger and Walmart in the US; and Morrisons, Sainsbury's and Tesco in the UK.
- 10 Based on Oxfam's calculations. Refer to the Methodology note for more information.
- 11 Ibid.
- 12 Ibid.
- 13 Ibid.
- 14 Oxfam calculations based on R. Willoughby and T. Gore. (2018). *Ripe for Change*. Oxford: Oxfam International, p.54. Based on average CEO salaries at US supermarkets Walmart, Costco and Kroger.
- 15 Average CEO pay for Costco, Kroger and Walmart in 2020 was \$17.71m, and the average wage in seafood processing [from J. Stride. (2021). *Precarity and the Pandemic: A survey of wage issues and COVID-19 impact amongst migrant seafood workers in Thailand*. CSO Coalition for Ethical and Sustainable Seafood. Retrieved from <http://policy-practice.oxfam.org.uk/publications/precarity-and-the-pandemic-a-survey-of-wage-issues-and-covid-19-impacts-amongst-621193> = 7,989 Thai baht (THB) per month, which equates to \$255.32 (average exchange rate 2020 = \$1: THB31.29), \$255.32 per month x 12 months = \$3,063.84 per year.
- 16 Willoughby and Gore. (2018). *Ripe for Change*, p.12.
- 17 Oxfam. (2021). *Behind the Barcodes Supermarket Scorecard*.
- 18 Refer to further explanation and Oxfam's 2019 Supermarket Scorecard outlined in Chapter 4.
- 19 A. Mattinson. (2021 March 9). *Supermarket Sales Growth Remains At Its Highest Level Since June 2020*. The Grocer. Retrieved from: <https://www.thegrocer.co.uk/finance/supermarket-sales-growth-remains-at-its-highest-level-since-june-2020/653975.article>
- 20 World Bank. (2020, June 8). *COVID-19 to plunge global economy into worst recession since World War II*. Retrieved June 1, 2021, from: <https://www.worldbank.org/en/news/press-release/2020/06/08/covid-19-to-plunge-global-economy-into-worst-recession-since-world-war-ii>
- 21 It should be noted that fuel sales make up a sizeable portion of total revenue for all three UK supermarkets (Morrisons, Sainsbury's and Tesco). For Morrisons, fuel sales historically made up around 20% of its total revenue, for Sainsbury's, those sales accounted for about 16.2% in Q1/2019 and for Tesco about 12.5% of its revenues in Q1/2019. Morrisons reported that profits fell by half in 2020 due to COVID-19-related costs. However, it should be noted that sales at its stores were up by nearly 9% and online sales tripled during the year. (See Z. Wood. (2021, March 11). *Morrisons profits fall by half in 2020 as costs of Covid pandemic bite. The Guardian*. Retrieved from: <https://www.theguardian.com/business/2021/mar/11/morrisons-profits-fall-2020-covid>).
- 22 See Chapter 1, Table 1.
- 23 Oxfam calculations; for details, please see the Methodology note.
- 24 V. Mair. (2020, March 23). *\$4.5trn of investors call out corporates on human rights*. Responsible Investor website. Retrieved from: <https://www.responsible-investor.com/articles/usd4-5trn-of-investors-call-out-corporates-on-human-rights>. See also H. Bradford. (2021, May 10). *Investors call out companies over human rights risks*. Pensions & Investments website. Retrieved from: <https://www.pionline.com/esg/investors-call-out-companies-over-human-rights-risks>
- 25 L. Beckett. (2020, April 1). *Whole Foods workers hold 'sick-out' to demand hazard pay during pandemic. The Guardian*. Retrieved from: <https://www.theguardian.com/business/2020/mar/31/whole-foods-coronavirus-outbreak-us-health>
- 26 Oxfam. (2020). *Oxfam hits the road to end human suffering*. Retrieved from: <https://politicsofpoverty.oxfamamerica.org/oxfam-hits-the-road-to-end-human-suffering/>. See also S. Farrell. (2019, October 24). *Oxfam delivers petition urging Lidl to make human rights improvements. The Grocer*. Retrieved from: <https://www.thegrocer.co.uk/lidl/oxfam-delivers-petition-urging-lidl-to-make-human-rights-improvements/598862.article>
- 27 Based on research conducted by Brazilian Inter-Union Department of Statistics and Socio-Economic Studies (DIEESE) in December 2020, for which the Brazilian Ministry of Labour Annual Report of social data for Minas Gerais 2019 (RAIS database) was consulted. The DIEESE research can be retrieved from Oxfam upon request.
- 28 On average, women workers earn 28.7% less than their male counterparts across different tiers of seafood supply chains in Thailand. See Chapter 3, Figure 6, for more information.

- 29 Average CEO pay for Costco, Kroger and Walmart in 2020 was \$17.71m, and the average wage in seafood processing [from J. Stride. (2021). Precarity and the Pandemic: A survey of wage issues and COVID-19 impact amongst migrant seafood workers in Thailand. CSO Coalition for Ethical and Sustainable Seafood. Retrieved from <http://policy-practice.oxfam.org.uk/publications/precarity-and-the-pandemic-a-survey-of-wage-issues-and-covid-19-impacts-amongst-621193> = 7,989 Thai baht (THB) per month, which equates to \$255.32 (average exchange rate 2020 = \$1:THB31.29), \$255.32 per month x 12 months = \$3,063.84 per year.
- 30 World Bank. (2020, June 8). *COVID-19 to plunge global economy into worst recession since World War II*. Retrieved 1 June, 2021, from: <https://www.worldbank.org/en/news/press-release/2020/06/08/covid-19-to-plunge-global-economy-into-worst-recession-since-world-war-ii>
- 31 E. Berkhout, N. Galasso, M. Lawson, P.A.R. Morales, A. Taneja and D.A.V. Pimentel. (2021). *The Inequality Virus: Bringing Together A World Torn Apart By Coronavirus Through A Fair, Just And Sustainable Economy*. Oxford: Oxfam International. Retrieved from: <https://www.oxfam.org/en/research/inequality-virus>
- 32 Oxfam. (2021, January 25). *Mega-rich recoup COVID-losses in record time yet billions will live in poverty for at least a decade*. Retrieved June 1, 2021, from: <https://www.oxfam.org/en/press-releases/mega-rich-recoup-covid-losses-record-time-yet-billions-will-live-poverty-least>
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- 34 ILO monitor 7th edition. (2021, January 25). *Uncertain and uneven recovery expected*.
- 35 Research underpinning this chapter was conducted by Profundo, which analyzed supermarkets' publicly available financial information between March and April 2021. See Methodology note for more details.
- 36 Since 2018, Oxfam scored 16 of the biggest supermarkets in Europe and the US on how they tackle critical issues affecting people working in their food supply chains. Methodology and data can be found here: <https://indepth.oxfam.org.uk/behind-the-barcode/scorecard/>
- 37 I. Quinn. (2021, May 17). Competition watchdog sets out what Issa brothers must do to clinch Asda takeover deal Retrieved from: <https://www.thegrocer.co.uk/mergers-and-acquisitions/competition-watchdog-sets-out-what-issa-brothers-must-do-to-clinch-asda-deal/656145.article>
- 38 T. Metcalf. (2020, August 1). *These are the world's richest families – a pandemic hasn't stopped many of the planet's wealthiest dynasties from adding to their fortunes*. Retrieved from: <https://www.bloomberg.com/features/richest-families-in-the-world/>
- 39 Bloomberg Billionaire Index is a daily ranking of the world's richest people: see <https://www.bloomberg.com/billionaires/profiles/karl-albrecht/> and <https://www.bloomberg.com/billionaires/profiles/beate-heister/>
- 40 Bloomberg Billionaire Index: <https://www.bloomberg.com/billionaires/profiles/dieter-schwarz/> 113.3bn euros, converted to \$ using www.oanda.com/currency/converter on March 13, 2021.
- 41 Data shows Schwarz's wealth grew from \$22bn to \$29bn between April 2020 and early 2021. <https://www.bloomberg.com/billionaires/profiles/dieter-schwarz/>
- 42 R. Andersen. (2020, October 22). *Jumbo-eigenaren kopen deel Hema: hoe nu verder?* Retrieved from: <https://www.volkskrant.nl/nieuws-achtergrond/jumbo-eigenaren-kopen-deel-hema-hoe-nu-verder-b919ca76/>
- 43 52.5m euros, converted to \$ using www.oanda.com/currency/converter on March 31, 2021.
- 44 Based on Oxfam's estimates. Please see the calculations spreadsheet accompanying our Methodology note. Core organic growth like-for-like sales (excluding fuel sales) for all listed companies during Q2, Q3 and Q4 2020. Oxfam uses like-for-like sales (excluding fuel sales) to compare the company's growth from stores/products with similar characteristics, omitting outliers that could distort the results.
- 45 Calculations based on published financial information of privately owned retailers.
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- 47 Jumbo. (2021). *Jumbo legt met sterke omzetgroei in 2020 solide basis voor jubileumjaar 2021*. Retrieved from: <https://nieuws.jumbo.com/persbericht/jumbo-legt-met-sterke-omzetgroei-in-2020-solide-basis-voor-jubileumjaar-2021/549/>
- 48 PLUS. (2021). *PLUS realiseert forse omzetstijging in bewogen jaar*. Retrieved from: https://www.plus.nl/info-over-plus/pg_persinformatie/persberichten/plus-realiseert-voor-omzetstijging-in-bewogen-jaar-cid-eggKKQXj5sAAAF2SLdSytew PLUS's sales grew from 2.61bn euros in 2019 to 2.98bn euros in 2020, converted to \$ using www.oanda.com/currency/converter on March 31, 2021.
- 49 Calculations based on published financial information of listed US retailers and Ahold Delhaize. Extra revenues gained from Q2-Q4 of 2020 (covering period between February 2, 2020 to November 7, 2020), compared to Q2-Q4 of 2019 – Ahold Delhaize: \$4.0bn; Albertsons Companies: \$6.4bn; Costco: \$6.7bn; Kroger: \$8.2bn; and Walmart: \$15.9bn. Note that Albertsons Companies communicated to Oxfam that its calculation for its share of additional revenues gained was \$6.9bn and Kroger communicated to Oxfam that its additional revenues were \$8.4bn during this period. Please refer to the Methodology note for more information.
- 50 Morrisons reported profits fell by half in 2020 due to the costs of COVID expenses. However, it should be noted that sales at its stores were up by nearly 9% and online sales tripled during the year. See Z. Wood. (2020). *Morrisons profits fall by half in 2020*. *The Guardian*. Retrieved from: <https://www.theguardian.com/business/2021/mar/11/morrisons-profits-fall-2020-covid>
- 51 Fuel sales make up a sizeable portion of total revenue for all three UK supermarkets: for Morrisons, it historically made up around 20% of its total revenue; for Sainsbury's, 16.2% in Q1/2019; and for Tesco, about 12.5% of its revenues in Q1/2019.
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- 53 V. Romei. (2021, February 12). *UK suffers biggest drop in economic output in 300 years*. *The Financial Times*. Retrieved from: <https://www.ft.com/content/96e19afd-88b3-4e8d-bc3e-a72bd1f60d3c>
- 54 Oxfam uses like-for-like sales (excluding fuel sales) to compare the company's growth from stores/products with similar characteristics, omitting outliers that could distort the results. For more published information, refer to: BBC News. (2021, April 28). *Sainsbury's: Cost of Covid has been high*. Retrieved from: <https://www.bbc.co.uk/news/business-56912064>; and J. Sainsbury plc. (2021, April 28). *Preliminary results for the 52 weeks ended 6th March 2021*. Retrieved from: <https://www.about.sainsburys.co.uk/-/media/Files/S/Sainsburys/documents/reports-and-presentations/2021/Prelims%202021/Prelims%20final%20RNS.pdf>

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- 56 J. Sainsbury plc. (2021, April 28). *Preliminary results for the 52 weeks ended 6th March 2021*, p.14.
- 57 This also includes Ahold USA. According to Oxfam's estimates, about 60.8% of Ahold Delhaize's total revenues came from Ahold USA in 2020.
- 58 Oxfam. (2020, June 24). *Exposed: How US supermarkets are failing their workers in a global pandemic*. Retrieved from: <https://www.oxfamamerica.org/explore/research-publications/exposed-how-us-supermarkets-are-failing-their-workers-global-pandemic/?fbclid=IwAR060vRXdS23KXfC21fWs6WMGfSPUV-BhIDrc-MNNHkLT2FAHrl-TqrD8lQ>
- 59 L. Aratani. (2021, April 28). *Two weeks' paid sick leave at Walmart could have prevented 7,500 COVID-19 cases, report finds*. *The Guardian*. Retrieved from: https://www.theguardian.com/business/2021/apr/28/walmart-coronavirus-covid-19-deaths-paid-sick-leave?fbclid=IwAR1Ey6eALD7cb5aTSxfWjE2_Hw4Nuk0lF2aVQxK1SjzPJxETy-p0hpggDhM
- 60 A share buyback refers to the management of a public company buying back company shares that were previously sold to the public. It can be seen as an alternative, tax-efficient way to return money to shareholders. Definition retrieved from: <https://corporatefinanceinstitute.com/resources/knowledge/finance/share-repurchase/>
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- 62 Shareholders' payout ratio = total dividends paid + share buy-back / net income.
- 63 A. Baker, C. Haslam, A. Leaver, R. Murphy, L. Seabrooke, S. Stausholm and D. Wigan. (2021). *Against Hollow Firms: Repurposing The Corporation For A More Resilient Economy*. The Centre for Research on Accounting and Finance in Context. Retrieved from: https://www.sheffield.ac.uk/news/polopoly_fs/1.8924821/file/Against-Hollow-Firms.pdf
- 64 Costco (2020, November 16). *Costco Wholesale Corporation declares special cash dividend of \$ 10 per share*. Retrieved 2 June, 2021, from: <https://investor.costco.com/news-releases/news-release-details/costco-wholesale-corporation-declares-special-cash-dividend-10>
- 65 Based on Oxfam's calculations. We shared the information with Costco to confirm but the company did not respond to our request for information.
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- 67 Morrisons. (2020). *Preliminary results for the 52 weeks ended 31 January 2021*. Retrieved from: <https://www.morrisons-corporate.com/globalassets/corporatesite/investor-centre/2021-03-11---prelims-announcement---final-combined.pdf>
- 68 Shareholder payout ratio for Morrisons (2020) = total dividend payment / net income = (£268m / £96m) *100 = 279%. Based on Oxfam's calculation, total dividend payment for 2020 (£268m) is derived from interim dividend for the period ended 31 January 2021 of 2.04p (£49m) + special interim dividend for the period ended 31 January 2021 (£96m) and the proposed final ordinary dividend for the same period, estimated at £123m = £49m + £96m + £123m = £268m. All information was obtained from Morrisons' preliminary results for the 52 weeks ended 31 January 2021: <https://www.morrisons-corporate.com/globalassets/corporatesite/investor-centre/2021-03-11---prelims-announcement---final-combined.pdf>
- 69 Shareholder payout ratio for Morrisons (2019) = total dividend payment / net income = (£211m / £348m) *100 = 61%.
- 70 Walmart. (2021, February 18). *Walmart raises annual dividend to \$2.20 per share, marking 48th consecutive year of dividend increases*. Retrieved 2 June, 2021, from: <https://corporate.walmart.com/newsroom/2021/02/18/walmart-raises-annual-dividend-to-2-20-per-share-marking-48th-consecutive-year-of-dividend-increases>
- 71 Muller's income increased by €1.6m to €6m in 2020. In addition to his base salary of €1.1m, he also received various bonuses, in cash, shares or pension. See Retail Detail (2021, March 4). *Ahold Delhaize CEO Muller's paycheck balloons*. Retrieved from: <https://www.retaildetail.eu/en/news/food/ahold-delhaize-ceo-mullers-paycheck-balloons>
- 72 Retail Detail. (2021). *Ahold Delhaize CEO Muller's paycheck balloons*. Holt received over €1.5m more than in 2019, coming to a total of €5.27m. These amounts were converted to \$ using www.oanda.com/currency/converter on March 31, 2021.
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- 74 Oxfam used the average exchange rate (EUR/GBP to USD) for 2020. GBP/USD's average exchange rate for 2020: <https://www.exchangerates.org.uk/GBP-USD-spot-exchange-rates-history-2020.html> and EUR/USD's average exchange rate for 2020: <https://www.exchangerates.org.uk/EUR-USD-spot-exchange-rates-history-2020.html>
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- 76 K. Guilbert. (2018, June 21). *UK supermarket squeeze on suppliers fuels poverty and abuse, campaigners say*. Reuters. Retrieved from: <https://www.reuters.com/article/us-britain-retail-workers-abuse-idUSKBN1JH00J>
- 77 Willoughby and Gore. (2018). *Ripe for Change*.
- 78 Morrisons. (2020). *Morrisons to make immediate payments to help small suppliers with cashflow*. Retrieved 2 June, 2021, from: <https://www.morrisons-corporate.com/media-centre/corporate-news/morrisons-to-make-immediate-payments-to-help-small-suppliers-with-cashflow2/> See also: S. Farrell. (2020, June 9). *Aldi confirms immediate supplier payment terms will continue until at least September*. *The Grocer*. Retrieved from: <https://www.thegrocer.co.uk/aldi/aldi-confirms-immediate-supplier-payment-terms-will-continue-until-at-least-september/645185.article> and S. Farrell. (2021, January 4). *Aldi extends immediate payment terms for small suppliers until the end of 2021*. *The Grocer*. Retrieved from: <https://www.thegrocer.co.uk/aldi/aldi-extends-immediate-payment-terms-for-small-suppliers-until-the-end-of-2021/651736.article>
- 79 Reuters. (2020, March 25). *UK's Sainsbury's to pay small suppliers immediately during coronavirus pandemic*. Retrieved 2 June, 2021, from: <https://www.reuters.com/article/health-coronavirus-sainsburys-idUSL8N2BI3FN>; and Sainsbury's. (2020, March 25). *Sainsbury's steps up to support suppliers, partners and tenants*. Retrieved 2 June, 2021, from: <https://www.about.sainsburys.co.uk/news/latest-news/2020/25-03-2020-sainsburys-steps-up-to-support-suppliers-partners-and-tenants>

- 80 Tesco. (2021, January 14). *Tesco announces long-term support for 1,300 of its smallest suppliers*. Retrieved 2 June, 2021, from: <https://www.tescopl.com/news/2021/tesco-announces-long-term-support-for-1-300-of-its-smallest-suppliers/>
- 81 Just Food. (2021, May 13). *Will Covid-19 spark change in UK supplier payment terms?* Retrieved from: https://www.just-food.com/analysis/will-covid-19-spark-change-in-uk-supplier-payment-terms_id143672.aspx
- 82 I. Quinn. (2020, July 3). *Sainsbury's scraps immediate payments for small suppliers*. *The Grocer*. Retrieved from: <https://www.thegrocer.co.uk/sainsburys/sainsburys-scraps-immediate-payments-for-small-suppliers/646071.article?adredir=1>
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- 84 Willoughby and Gore. (2018). *Ripe for Change*, p.18, Figure 9.
- 85 The research was undertaken by the Bureau for the Appraisal of Social Impacts for Citizen Information (BASIC) in December 2020. See Methodology note for more information.
- 86 BASIC (2018). *Coffee: Behind the Success Story*. Retrieved from: <https://lebasic.com/en/coffee-the-success-story-hiding-a-crisis/>
- 87 The following Oxfam reports highlight women's rights issues in supermarkets supply chains:

Willoughby and Gore. (2018). *Ripe for Change*, p.12.

S. Banerji and R. Willoughby (2019). *Addressing the Human Cost of Assam Tea: An Agenda for Change to Respect, Protect and Fulfil Human Rights on Assam Tea Plantations*, pp.25–27. Oxford: Oxfam International. Retrieved from: <https://oxfamilibrary.openrepository.com/bitstream/handle/10546/620876/bp-human-cost-assam-tea-101019-en.pdf>

Oxfam. (2018). *Supermarket Responsibilities for Supply Chain Workers' Rights: Continuing Challenges in Seafood Supply Chains and the Case for Stronger Supermarket Action*. Oxford: Oxfam International and the Sustainable Seafood Alliance Indonesia. Retrieved from: <https://oxfamilibrary.openrepository.com/bitstream/handle/10546/620480/cs-supermarket-responsibilities-workers-rights-seafood-210618-en.pdf?sequence=1>, p.26
- 88 UN Women. (2020). *Guidance for Action: Gender-Sensitive Private Sector Response to COVID-19 for Accelerated and Inclusive Economic Recovery*. Bangkok: UN Women Regional Office for Asia and the Pacific. Retrieved from: http://www3.weforum.org/docs/WEF_51129_WP_Global_Value_Chain_Policy_Series_Gender_report_2018.pdf, p.4 and pp.7–8
- 89 In Indian rupees, the amounts are 3,745 rupees for women, compared to 4,672 rupees for men. Calculated to \$ based on www.oanda.com/currency/converter on March 9, 2021.
- 90 ILO monitor 7th edition. (2021). *ILO: Uncertain and uneven recovery*.
- 91 ILO. (2020). *Empowering Women at Work: Company Policies and Practices for Gender Equality*. Geneva: ILO. Retrieved from: https://www.ilo.org/empent/Publications/WCMS_756721/lang--en/index.htm
- 92 ILO Issue paper. (2020). *Issue Paper on COVID-19 and Fundamental Principles and Rights at Work*. Geneva: ILO. Retrieved from: https://www.ilo.org/global/about-the-ilo/how-the-ilo-works/departments-and-offices/governance/fprw/WCMS_757247/lang--en/index.htm, p.25.
- 93 Banerji and Willoughby. (2019). *Addressing the Human Cost of Assam Tea*.
- 94 Based on research conducted by DIEESE in December 2020, for which the Brazilian Ministry of Labour Annual Report of social data for Minas Gerais 2019 (RAIS database) was consulted.
- 95 N. Chaiprakobwiriya, S. Phuengnet, N. Phannajit and S. Dolah. (2020). *Rapid Gender Analysis for COVID-19: Gendered Impact of the COVID-19 Pandemic on Migrants in Thailand*. Bangkok: Raks Thai Foundation. Retrieved from: https://www.raksthaiplp.org/uploads/1/2/0/6/120675026/rga_for_covid-19_on_migrants_in_thailand_june_2021.pdf
- 96 Ergon Associates, study commissioned by Joint Ethical Trading Initiatives. (2015). *Living Wages in Global Supply Chains: A New Agenda For Business*. Retrieved from: https://www.ethicaltrade.org/sites/default/files/shared_resources/living-wages-in-global-supply-chains.pdf
- 97 Global Living Wage Coalition website. See: <https://www.globallivingwage.org/about/what-is-a-living-wage/>
- 98 Joint Ethical Trading Initiatives. (2015). *Living Wages in Global Supply Chains*, p.6.
- 99 The research was conducted by DIEESE in December 2020.
- 100 Brazilian Federal Constitution (1988). Article 7, IV. Retrieved from: https://www.oas.org/es/sla/ddi/docs/acceso_informacion_base_dc_leyes_pais_b_1_en.pdf, p.21
- 101 Oxfam calculations. For details, please see Methodology note.
- 102 Oxfam India. (2021, forthcoming). *In Defense of Living Wages for Tea Plantation Workers: Evidence from Assam*. This is the monthly amount of 4,774 rupees divided by 26 working days, i.e. 183.6 rupees a day.
- 103 These wages also include non-cash benefits which workers are entitled to as per the provisions of the Plantation Labour Act, 1951. The benefits include housing, ration, healthcare, education and firewood for cooking.
- 104 Tea Board of India, Survey 2015. See: <http://www.teaboard.gov.in/teaboardpage/oda>
- 105 SOMO and TC0E. (2020). *Pressing Issues: South African Wine Farms and the Responsibility for Due Diligence by Dutch Supermarkets*, p.57. Centre for Research on Multinational Corporations (SOMO) and the Trust for Community Outreach and Education (TC0E). Retrieved from: <https://www.somo.nl/pressing-issues/>
- 106 A. Saqlain. (2021). *Living Income Gap in the Rice Value Chain: Stories of Rice Growers and Farm Workers*. Oxfam in Pakistan and AGAHE. Retrieved from: <https://growinpakistan.com/graisea/>
- 107 The amount of the minimum daily wage of each province in Thailand differs depending on the cost of living. See Thailand Board of Investment: https://www.boi.go.th/index.php?page=labour_costs The minimum wage for each province covered in this survey, from highest to lowest in Thai baht (THB), is as follows: Rayong (THB 335), Samut Sakhon (THB 331), Phang Nga (THB 325), Songkhla (THB 325), Surat Thani (THB 325), Satun (THB 315), Ranong (THB 315), Pattani (THB 313).
- 108 J. Stride. (2021). *Precarity and the Pandemic: A survey of wage issues and COVID-19 impact amongst migrant seafood workers in Thailand*. CSO Coalition for Ethical and Sustainable Seafood. Retrieved from <http://policy-practice.oxfam.org.uk/publications/precarity-and-the-pandemic-a-survey-of-wage-issues-and-covid-19-impacts-amongst-621193>
- 109 The daily minimum wage varies between THB 313 and THB 335 depending on location. The monthly minimum wage, based on a 30-day work month, varies between THB 9,390 and THB 10,050. These amounts were converted to \$ using www.oanda.com/currency/converter on March 31 2021.

- 110 Dutch supermarkets Albert Heijn (a Ahold Delhaize subsidiary), Jumbo and PLUS have all committed to the Banana retail commitment. See: [https://www.idhsustainabletrade.com/news/banana-retail-commitment-on-living-wage/#:~:text=The%20goal%20of%20supermarkets%20is,wages%20and%20the%20living%20wage](https://www.idhsustainabletrade.com/news/banana-retail-commitment-on-living-wage/#:~:text=The%20goal%20of%20supermarkets%20is,wages%20and%20the%20living%20wage.). German supermarkets Aldi North and Aldi South, Lidl and REWE Group published a commitment in 2020 aimed at enabling farming and working families in global supply chains to have a decent standard of living and are part of a working group convened by government ministries BMZ and GIZ. See: <https://views-voices.oxfam.org.uk/2020/01/german-supermarkets-commit-to-tackle-low-wages/>. UK supermarkets Morrisons, Sainsbury's and Tesco have a statement on living wages on their websites.
- 111 Albert Heijn, Jumbo and Lidl publish the names and locations of their own-brand first-tier food suppliers, while Aldi North and Aldi South commit to publishing only their high-risk first-tier food suppliers by 2022.
- 112 Oxfam. (2018). *Supermarket Responsibilities for Supply Chain Workers' Rights*.
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- 114 ILO (2019). Thailand ratifies Work in Fishing Convention. See: https://www.ilo.org/global/about-the-ilo/newsroom/news/WCMS_666581/lang--en/index.htm
- 115 CSO Coalition for Ethical and Sustainable Seafood. (2021). *Situation Update and Policy Recommendations on the Current COVID-19 Outbreak among Migrant Workers in Thailand's Seafood Supply Chain – January 2021*. Retrieved from: http://hrdfoundation.org/wp-content/uploads/2021/02/Jan2021_Situation-Update-and-Policy-Recommendations_COVID19_Thailand_Supermarkets.pdf
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- 117 The normal wage reported is THB 4,000–4,500 every two weeks. This was converted to \$ using www.oanda.com/currency/converter on March 31, 2021.
- 118 The current wage reported is THB 600–800 every two weeks. This was converted to \$ using www.oanda.com/currency/converter on March 31, 2021.
- 119 Food and Agriculture Organization of the United Nations website. FAOStat 'Crops', see: <http://www.fao.org/faostat/en/#data/QC>
- 120 Based on research conducted by Brazilian Inter-Union Department of Statistics and Socio-Economic Studies (DIEESE) in December 2020, for which the Brazilian Ministry of Labour Annual Report of social data for Minas Gerais 2019 (RAIS database) was consulted. The DIEESE research can be retrieved from Oxfam upon request.
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