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London**



Global Consumer Trends for Food & Drink in a Turbulent World

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Emeritus Professor of Food Marketing



Aarhus City Hall

Aarhus, Denmark

Wednesday, September 27th, 2023



@profdavidhughes

www.supermarketsinyourpocket.com

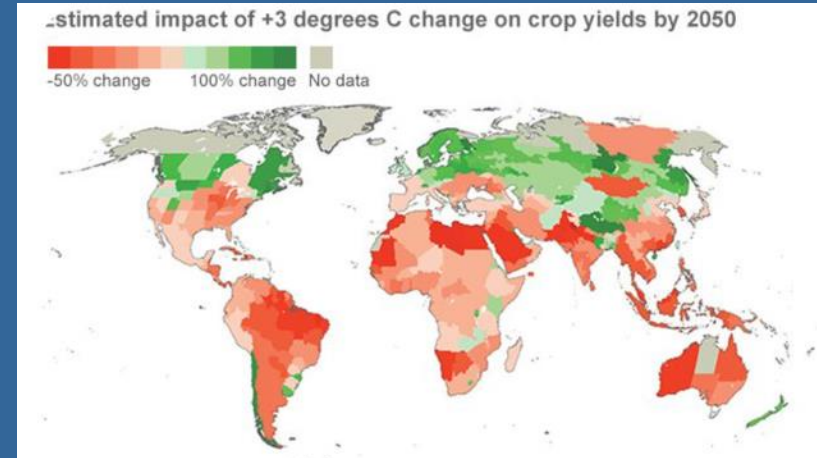
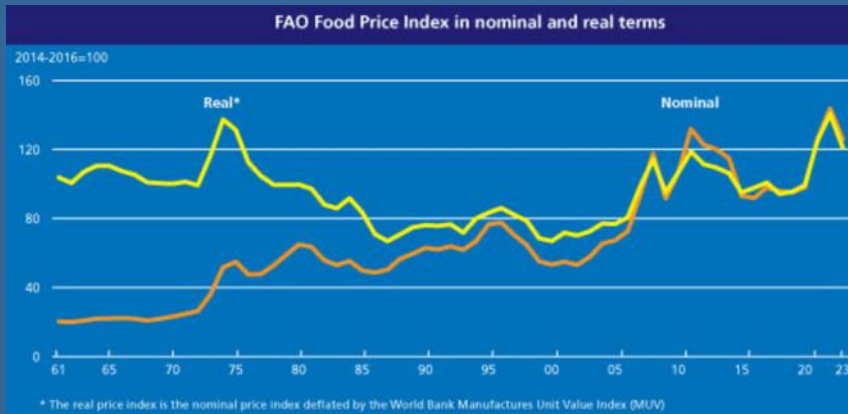
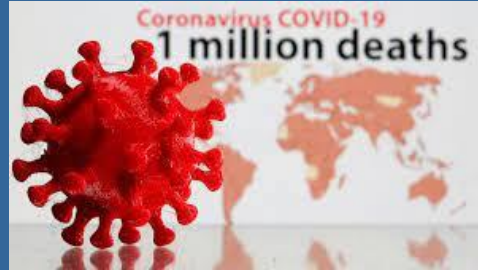


We are Living in Particularly Turbulent Times which are, likely, the New Normal!

unprecedented

/ʌnˈpreʃɪdntɪd/

Definition: never done or known before.



8 cycles of ice ages and warmer periods in the last 800,000 years!

Twelve European countries broke temperature records in 2022



Tackling climate change needs a rapid transformation of the way our world works, travels, eats and uses energy, according to an important UN review.

September 8th, 2023



Ocean heat record broken, with grim implications for the planet

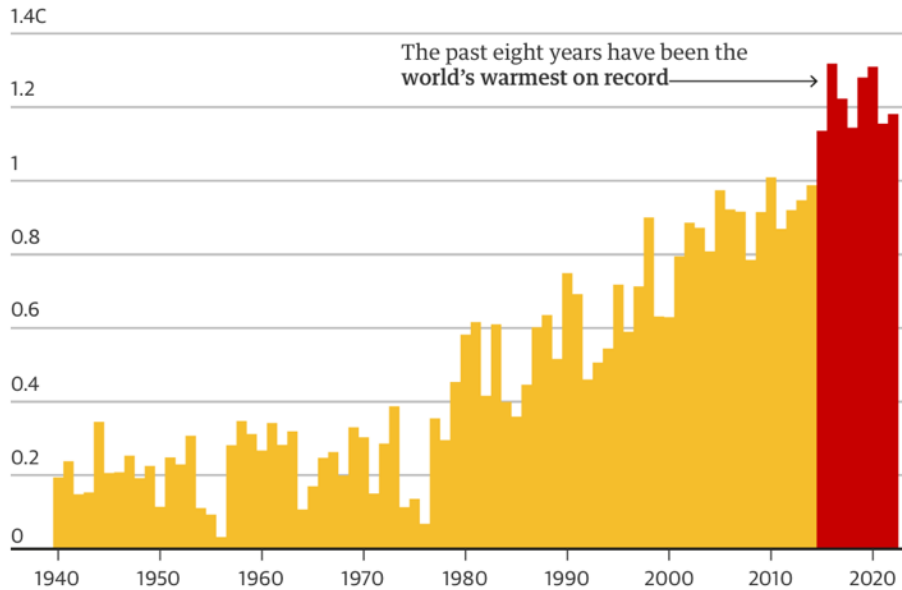
August 4th, 2023



Global temperatures in 2023 set to be among hottest on record

Global temperatures have risen to record-breaking levels

Increase in annual global-average temperature above 1850-1900 average, in degrees Celsius



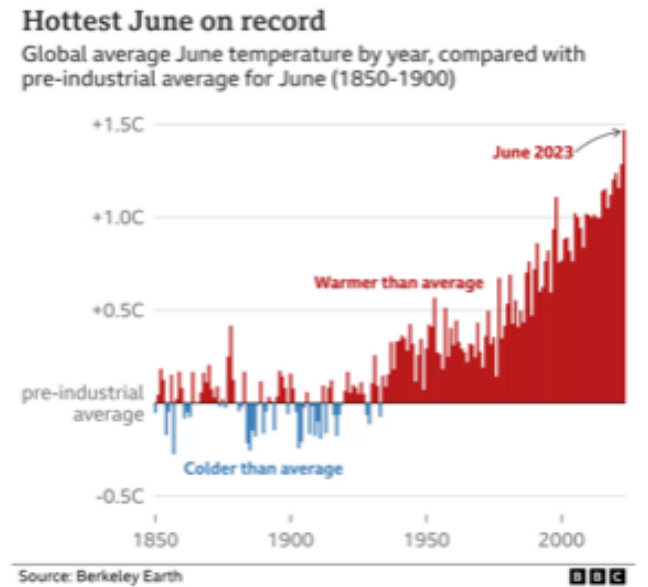
Guardian graphic. Source: Copernicus Climate Change Service, ERA5. Figures are for surface air temperature anomalies at two metres above ground level, relative to 1850-1900.

Soaring temperatures to record rainfall: Asia reels as climate crisis takes hold

July 17th, 2023

Typhoon floods China's northeastern crops in latest blow to global grain supplies

August 8th, 2023



Sea level rise accelerates, European glacier melt shatters records,

El Niño planet-warming weather phase has begun

May 2023

US scientists confirmed that El Niño had started. Experts say it will likely make 2024 the world's hottest year.



Food security is back on EU leaders' menu with a global flavour

Countries are Increasingly Concerned About Their Food Security

UK sleepwalking into food supply crisis, says farming union December 6th, 2022



'Tsunami of need' - UK's biggest food bank network launches emergency appeal October 20th, 2022



Yes, we have no tomatoes: Why shelves are emptying in UK stores

February 2023

Rabobank analysis forecasts "eggflation" to remain high in 2023

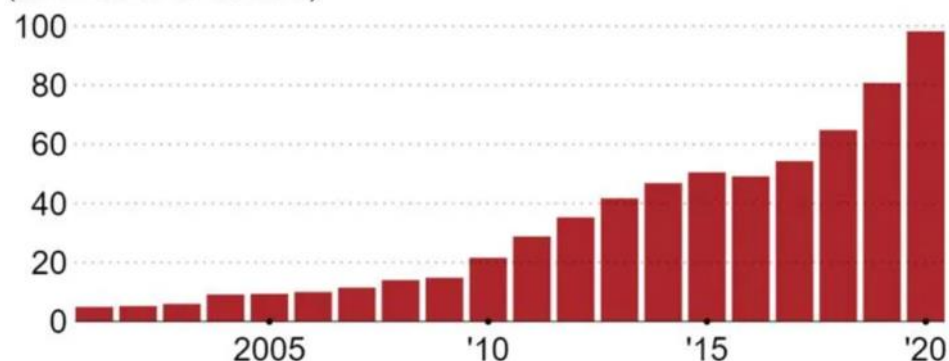
Canada is facing a dangerous food insecurity crisis



Nearly 6 million people in Canada experienced food insecurity in 2021,

China food imports by year

(In billions of dollars)



Lack of fertiliser and CO2 gas self-sufficiency a risk to food security



July 31st
2023

India's ban on rice exports raises fear of global food price rises July 27th, 2023



Argentina keeps beef export ban in place until 2024 January 2023



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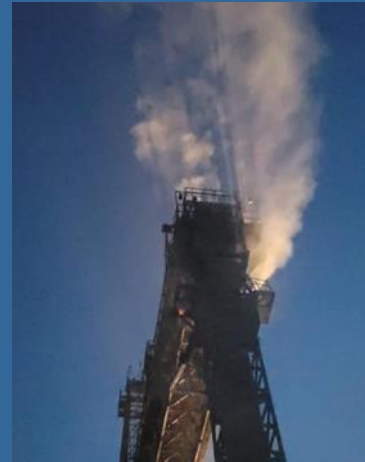
Source: General Administration of Customs of China

It Ain't Over 'til it's Over!*

Russia halts grain deal in what UN calls blow to needy people everywhere

July 18-20th, 2023

Kyiv says Russia targets grain infrastructure with strikes on Ukraine's Odesa port



Russia destroys 60,000 tonnes of grain in Black Sea missile strike

India's ban on rice exports raises fear of global food price rises

July 20th, 2023

Attempt to curb domestic inflation behind country's decision on non-basmati white rice



Cereal crops and other commodities including olives and tomatoes hit by Europe's heatwave

July 27th, 2023

Quality worries in Europe as rain stalls harvest

August 4th, 2023



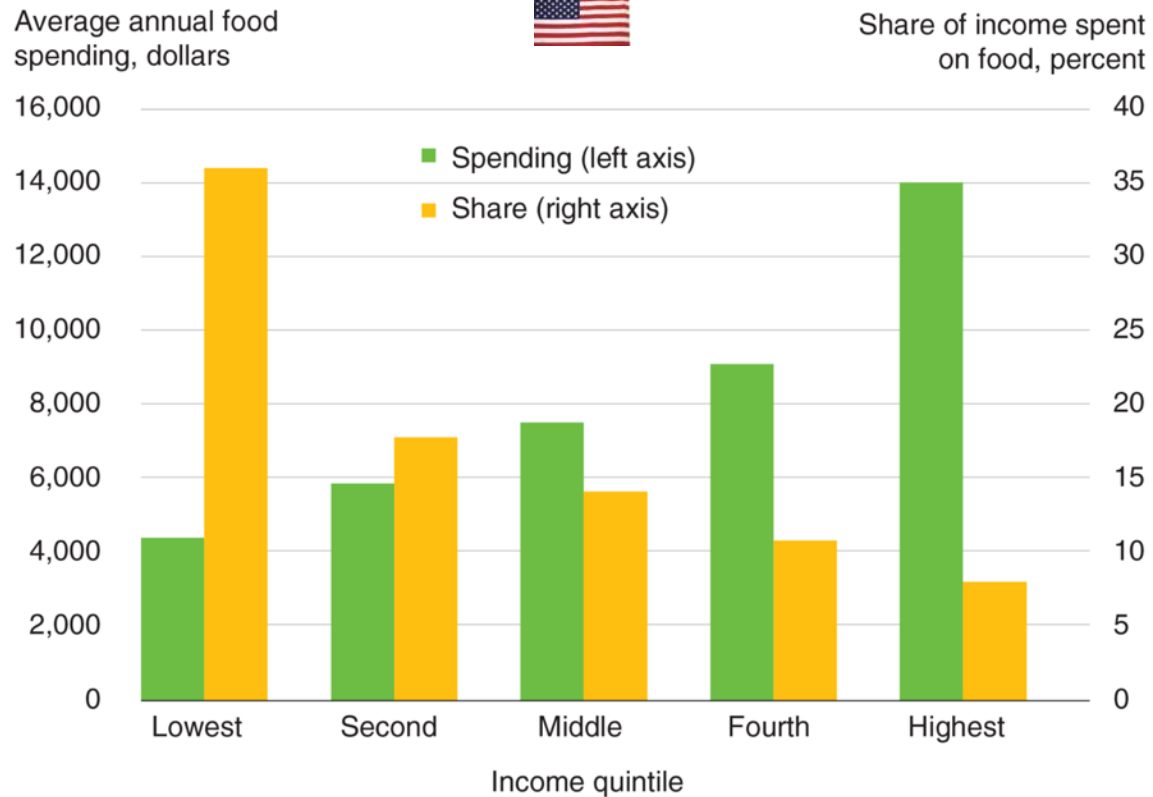
The Global Risks Report 2023
18th Edition

“ ... predicts persistent polycrises of food, energy & fertilizer shortages during the next 2 years ... food system failures are unavoidable and society can expect further food price spikes as the cost of living crisis continues”.

* Yogi Berra, American baseball legend and philosopher



Food spending and share of income spent on food by U.S. households, 2019

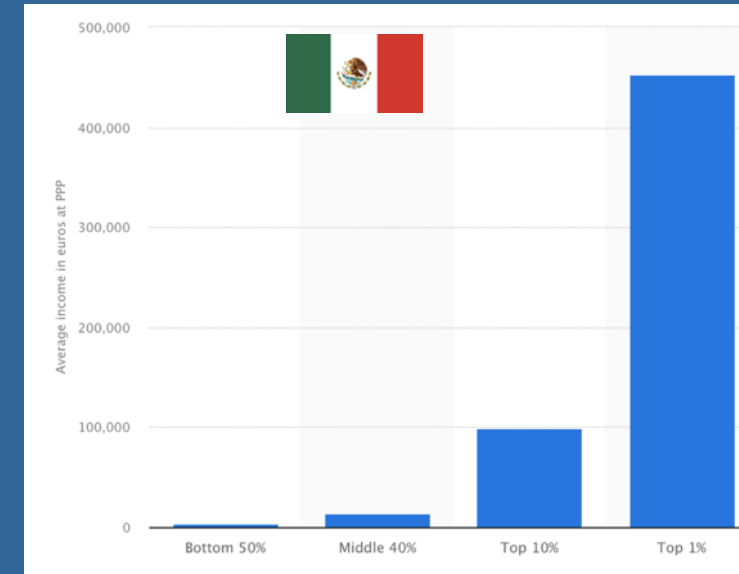


Source: USDA, Economic Research Service using data from the U.S. Bureau of Labor Statistics, Consumer Expenditure Survey 2019.

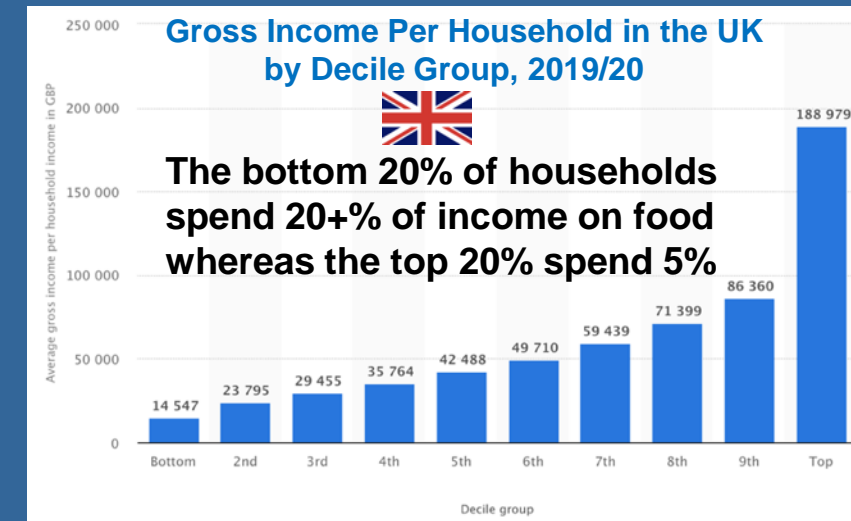
The Lowest 20% of Households Spend 37% of Their Income on Food Whereas the Top 20% Spend 7% of Their Income on Food

The “Haves” and “Have Nots”

Average income in Mexico in 2021, by income percentile



The top 10% of households are comfortable whereas 90% are in trouble!




The bottom 20% of households spend 20+% of income on food whereas the top 20% spend 5%

Polarization of Household Income has Accelerated Over the Past 5 Years Throughout Our World

Hard Discounters, Aldi and Lidl, Drive Ferocious Retail Food Price War in UK.
Cost-of-Living Crisis is Causing Economic, Social & Political Crises Worldwide!

A Pizza for <€/\$1?!


6+ days

114g


Hearty Food Co. Cheese & Tomato Pizza 114G

[Write a review >](#)

[Rest of shelf >](#)

 Aldi Price Match


£0.55 £0.48/100g



Hearty Food Thin Pepperoni Pizza 314G

[Write a review >](#)

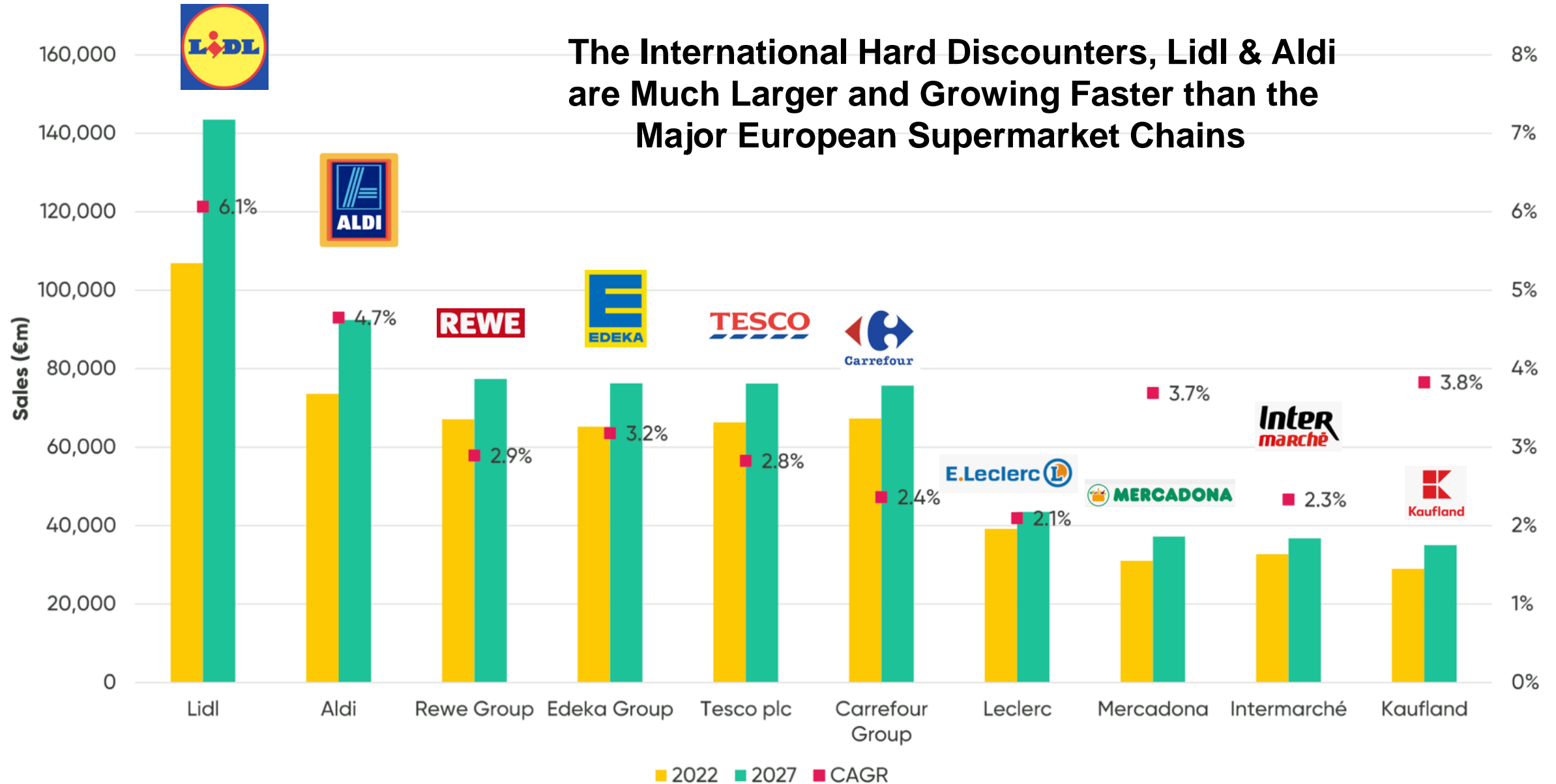
[Rest of shelf >](#)

 Aldi Price Match

£0.90 £0.29/100g



Europe's top 10 grocery retailers: sales growth 2022-27



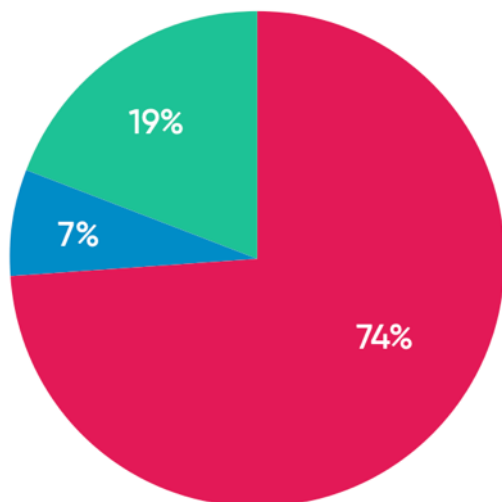


Data at a glance



Source: IGD Research, May 2023, Base: 997 GB shoppers, balanced sample

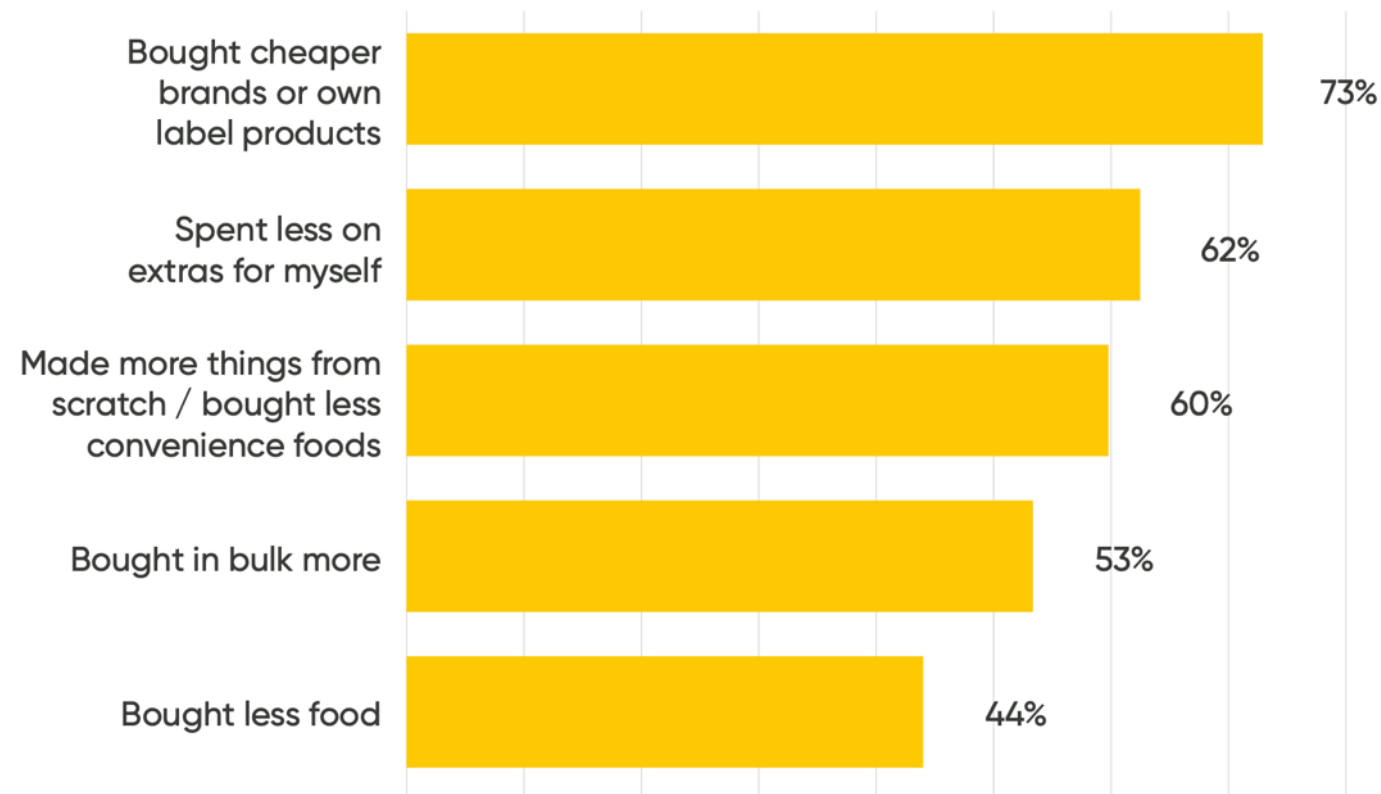
Changes in shopping choices



- The cost-of-living crisis has impacted my food and grocery shopping choices
- Neither agree nor disagree
- The cost-of-living crisis has NOT impacted my food and grocery shopping choices

Changes in shopping choices

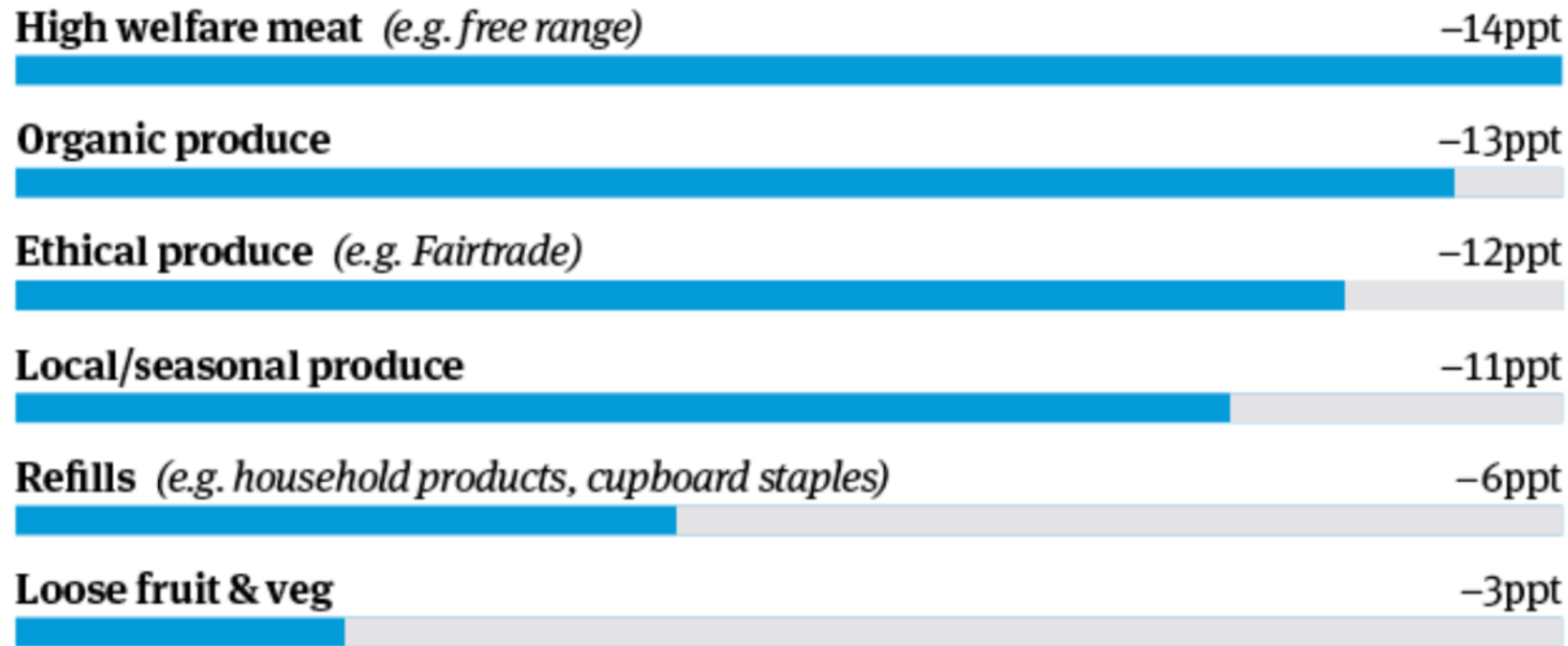
% making changes to food and grocery shopping in last few months



Shoppers giving up on organic and healthy foods to cope with cost of living

The Grocer

Since February 2022, have you bought any of these products? *(compared to pre-cost of living crisis)*



Source: Lumina Intelligence survey of 1,000 UK adults

"With 49% of households focusing on value for money when buying new food and drink products, UK shoppers find themselves in a bit of a fix as they struggle to balance tight budgets with their health and sustainability values," said Katrina Bishop, UK Thought Leadership Activation Manager at NielsenIQ.

Survey undertaken
August 2022



May 2023

In the EU, p.c. fresh produce consumption down by 10% in 2022/23. F&V seen as being expensive. Frozen sales spike!

UK Organic Sales Decline in a Market Environment with Food Price Inflation at 18% p.a.:
Organic Meat & Poultry **↓** 18%
Organic Fruit and Veg. **↓** 13%
w/e April 16 2023 versus 2022

KANTAR

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Meat for the “Haves” & “Have Nots”



What can You Afford to Pay €/ \$3.50 or €/ \$80 per Kg.?

Meat Price Hierarchy

Lamb
Beef
Fish
Pork
Chicken



5+ days

Tesco Whole Chicken Extra Large 1.9Kg - 2.3Kg

[Write a review >](#)

[Rest of shelf >](#)

£5.60 £2.95/kg



5+ days

Willow Farm Chicken Breast Portions 900G - 1.2Kg

[Write a review >](#)



[Rest of shelf >](#)

 **Aldi Price Match**



£6.29 £5.99/kg



	
Waitrose British Beef Extra Trimmed Fillet Steak	No.1 Dry Aged Hereford Beef Fillet Steak
Typical weight 0.25kg	Typical weight 0.25kg
★★★★☆ (300)	★★★★☆ (141)
£10.41 each est. £41.00/kg	£16.50 each est. £66.00/kg

There's "Have" and "Have Not" Dogs, Too!

TESCO



Tesco Complete Beef & Vegetable 12 Kilograms

[Write a review >](#)

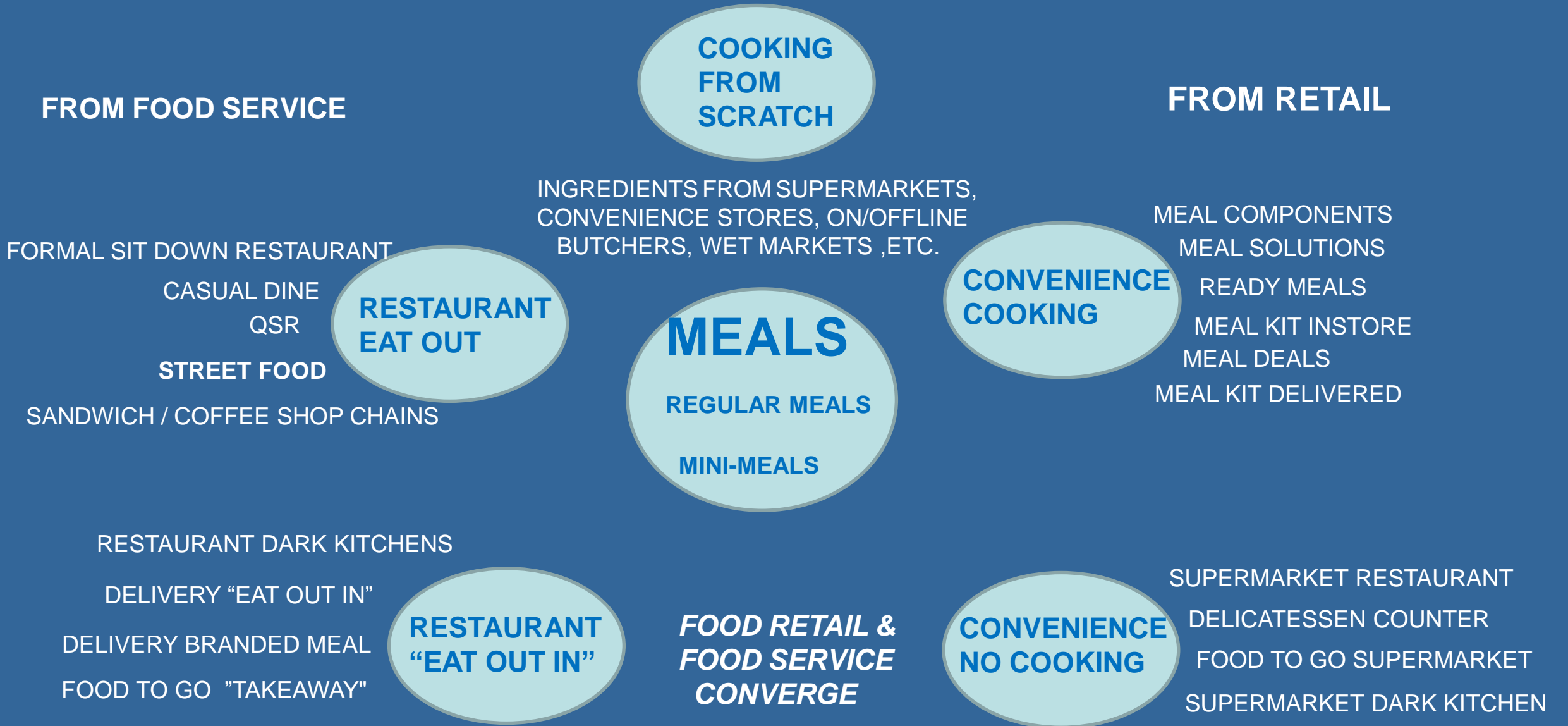
[Rest of shelf >](#)

£12.25 £1.02/kg

€/\$1.20 or €/\$14 per kg?

A Monument to Anthropomorphic Excesses!

HOW DO CONSUMERS SOLVE THEIR MEAL PROBLEMS?



"Shopping for Food Ingredients": An Archaic Term Familiar to Your Grandparents



DINE IN TONIGHT

WAITROSE
& PARTNERS

£11 SAVE UP TO £7
SERVES 2
SOUTH EAST & EAST ASIAN DINE IN
2 MAINS + 2 SIDES

£12 SAVE UP TO £4.50
SERVES 2
THE ITALIAN TAKEOUT DINE IN
2 PIZZAS + 1 SIDE + 1 DIP

£12 SAVE UP TO £1.45
SERVES 2
CHARLIE BIGHAM'S DINE IN
1 MAIN + 1 DESSERT

£12 SAVE UP TO £6.35
SERVES 2
Our Very Best Dine In For Two
MAIN + SIDE + STARTER (NEW!) OR DESSERT

£7 SAVE UP TO £3.85
SERVES 2
STIR FRY DINE IN
MEAT OR TOFU
STIR FRY VEG
SAUCE
NOODLES OR RICE

Food Retail and Food Service Converge



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Emerging, and Sometimes Stumbling, New Routes to the Food & Drink Consumer

Delivering: Restaurant Meals,
Groceries and More



Meal Kits and “Ready Meals”



“Super Fast” Guys

Market Summary > Hellofresh SE

31.66 EUR

+20.52 (184.20%) ↑ past 5 years

12 Sept, 09:46 CEST • Disclaimer

1D | 5D | 1M | 6M | YTD | 1Y | 5Y | Max



Top-Tier Considerations When Choosing Which Food and Beverage Products to Buy

The Hartman Group's *Brand Ambition: Food and Beverage Private Brands & Beyond* report finds that consumers consider **taste, price and quality** as the first-tier criteria when choosing which foods and beverages to buy.

Top Five Selection Drivers

(Among Category buyers, Average across 8 profiled categories)



To choose a product, consumers want to know how it will **satisfy taste expectations**, whether it is offered at an **acceptable price** point, the **product makeup** and **provenance**. **Brand plays a supporting role**, often standing in for a constellation of properties consumers seek, including distinctive taste experiences.

hartman
GROUP

Source:
Brand Ambition: Food and Beverage Private Brands & Beyond report



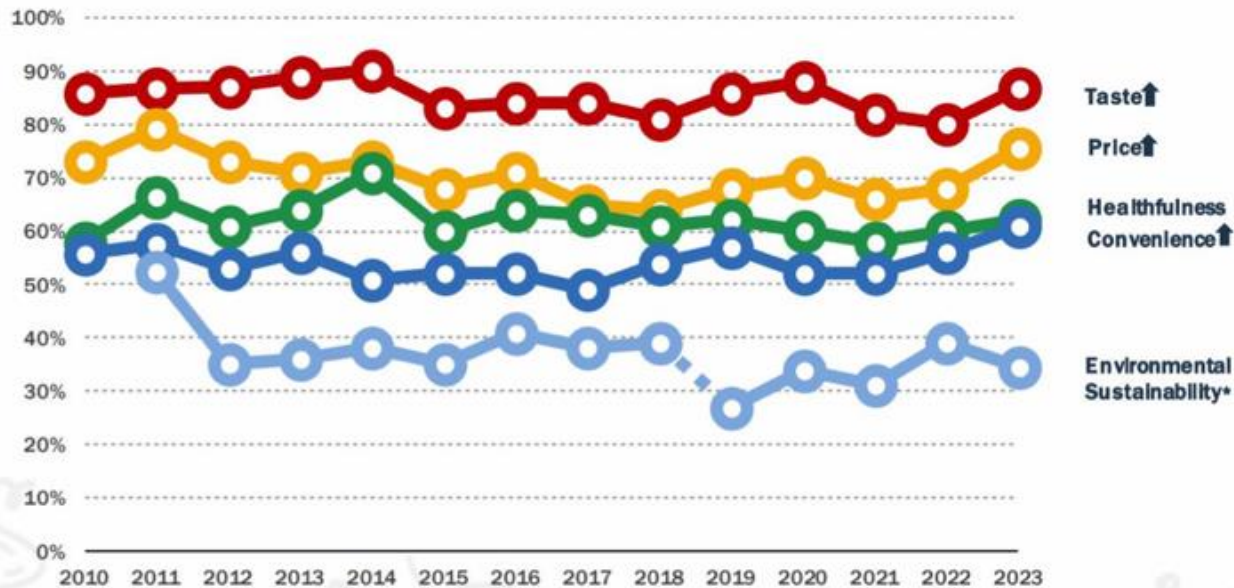
And don't forget:

- Convenience
- Health (if I remember)
- Values-related issues (when they're affordable)

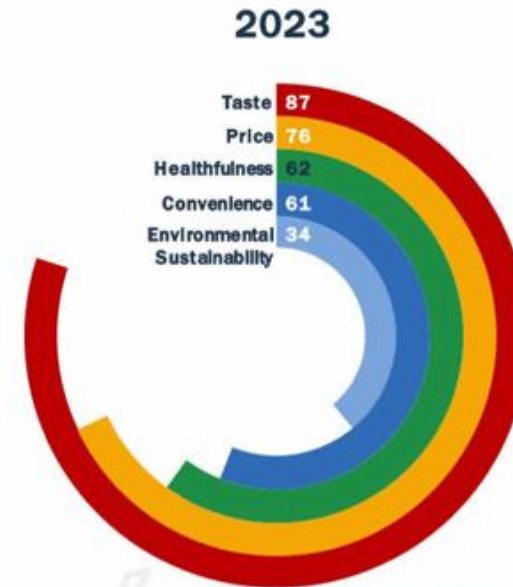


Taste #1 Purchase Driver

Purchase Drivers Over Time
(% 4-5 Impact out of 5)



[TREND] Q6 How much of an impact do the following have on your decision to buy foods and beverages? SUMMARY: TOP 2 (Great Impact/Somewhat of an Impact); (n=1,022)
 Note: Prior to 2019, "Environmental Sustainability" was addressed as "Sustainability"



2023 Food and Health Survey

International Food Information Council

Distillation of 2023 Global Consumer Trends

- Budgeteers Redefining Value: affordable & healthy supportive of “my values”
- “Unpuzzle” Health: Adding Positives Rather Than Just Removing Negatives
- Transparency Traceability Sustainability Authenticity
- Eco-economy (on food waste, plastic, energy, water, etc.) Positively Imperfect
- Consolidation of Hybrid Working (impact on food service)
- Quick Quality and Convenience
- Here and Now Revenge Spending (guilt-free indulgence)
- Trusted Traditional but Excite Me!
- Generational Push – looking after Digital Natives - Gen. Z (on issues & digital)
- Simplified Plant-Based (i.e. NOT multi-ingredient, over-processed fake meat!)



JM Smucker to acquire Hostess Brands in \$5.6bn deal



September 11th, 2023



The deal includes a range of sweet baked food brands from Hostess Brands, such as Donettes, Twinkies, CupCakes, DingDongs, Zingers, CoffeeCakes, HoHos, Mini Muffins, Fruit Pies, and the Voortman cookie brand.

Demand for Twinkies on the Rise

Ingredients: Twinkies

Enriched Bleached Wheat Flour [Flour, Reduced Iron, B Vitamins (Niacin, Thiamine Mononitrate (B1), Riboflavin (B2), Folic Acid)], Corn Syrup, Sugar, High Fructose Corn Syrup, Water, Partially Hydrogenated Vegetable and/or Animal Shortening (Soybean, Cottonseed and/or Canola Oil, Beef Fat), Whole Eggs, Dextrose. Contains 2% or Less of: Modified Corn Starch, Glucose, Leavenings (Sodium Acid Pyrophosphate, Baking Soda, Monocalcium Phosphate), Sweet Dairy Whey, Soy Protein Isolate, Calcium and Sodium Caseinate, Salt, Mono and Diglycerides, Polysorbate 60, Soy Lecithin, Soy Flour, Cornstarch, Cellulose Gum, Sodium Stearoyl Lactylate, Natural and Artificial Flavors, Sorbic Acid (to Retain Freshness), Yellow 5, Red 40.

Urban Myth has it that Twinkies have a Similar Half Life to Uranium-236 (23.4 million years)!

Invariably, in the Mass Market, Taste, Convenience & Price Trump Health (& other megatrends)



Nestlé's axe of Wunda and Garden Gourmet points to plant-based saturation

March 2023



Another grim quarter sees Beyond Meat's losses mount as sales plummet

September 2023



Big Meat retrenches as meat alternatives lose their luster

October 2022



Smithfield: Scaling back



JBS pulls plug on Planterra Foods US plant-based meat operation



October 3rd, 2022



April 18th, 2023

Kellogg discontinues MorningStar Farms Incogmeato burger



Why Plant-Based Meat Struggling?

- Unappealing taste & texture
- Expensive relative to meat
- Crowded & confusing marketplace
- Big Meat lack of branding experience
- Worrisomely long ingredient list



Yet, “Fake Meat” Keeps Coming and Cell-Based Meat Arrives

 Dairy giant FrieslandCampina makes UK alt meat debut with Tender'lish August 15th, 2023

USDA approves ‘cell-cultivated chicken’ label June 14th, 2023



First application for cultivated meat approval in Europe submitted



July 26th, 2023



Chicken grown from cells in bioreactors produced by Upside Foods and Eat Just will be labeled “cell-cultivated chicken” when it is sold and served to the public. The USDA approved both companies’ labels earlier this month.



Good Meat approved to sell serum-free cultivated meat in Singapore



January 2023

Imperial College London



Plant-based main dishes rolled out under Tesco Finest range

May 15th, 2023



Mondelēz launching vegan Cadbury bar

October 7th, 2021



Nestlé launches vegan KitKat in 15 European countries

September 1st, 2022



- The milk in the original KitKat is replaced in KitKat V with a rice-based alternative, the CPG giant said in a statement. The new candy is certified vegan and made from sustainably sourced cocoa.
- The plant-based chocolate category is currently small but has attracted attention from major candy makers eager to cash in on growing consumer interest in avoiding animal-derived foods and minimizing their environmental footprint.



THE POWER IS ON YOUR PLATE

The bigger, the worse

World, overweight and obesity forecasts

2

Share of population

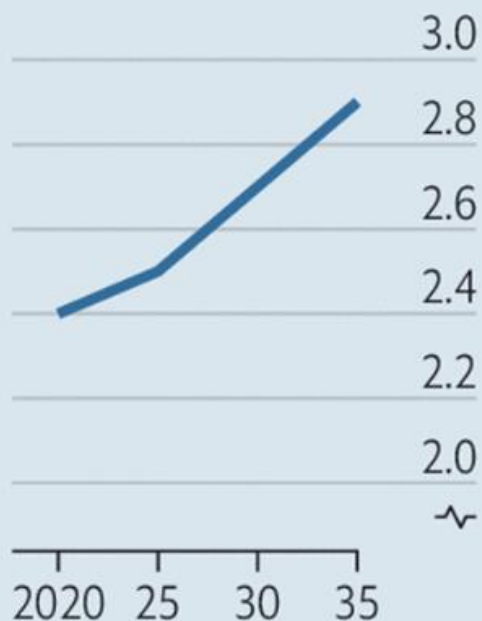
%



Source: World Obesity Federation

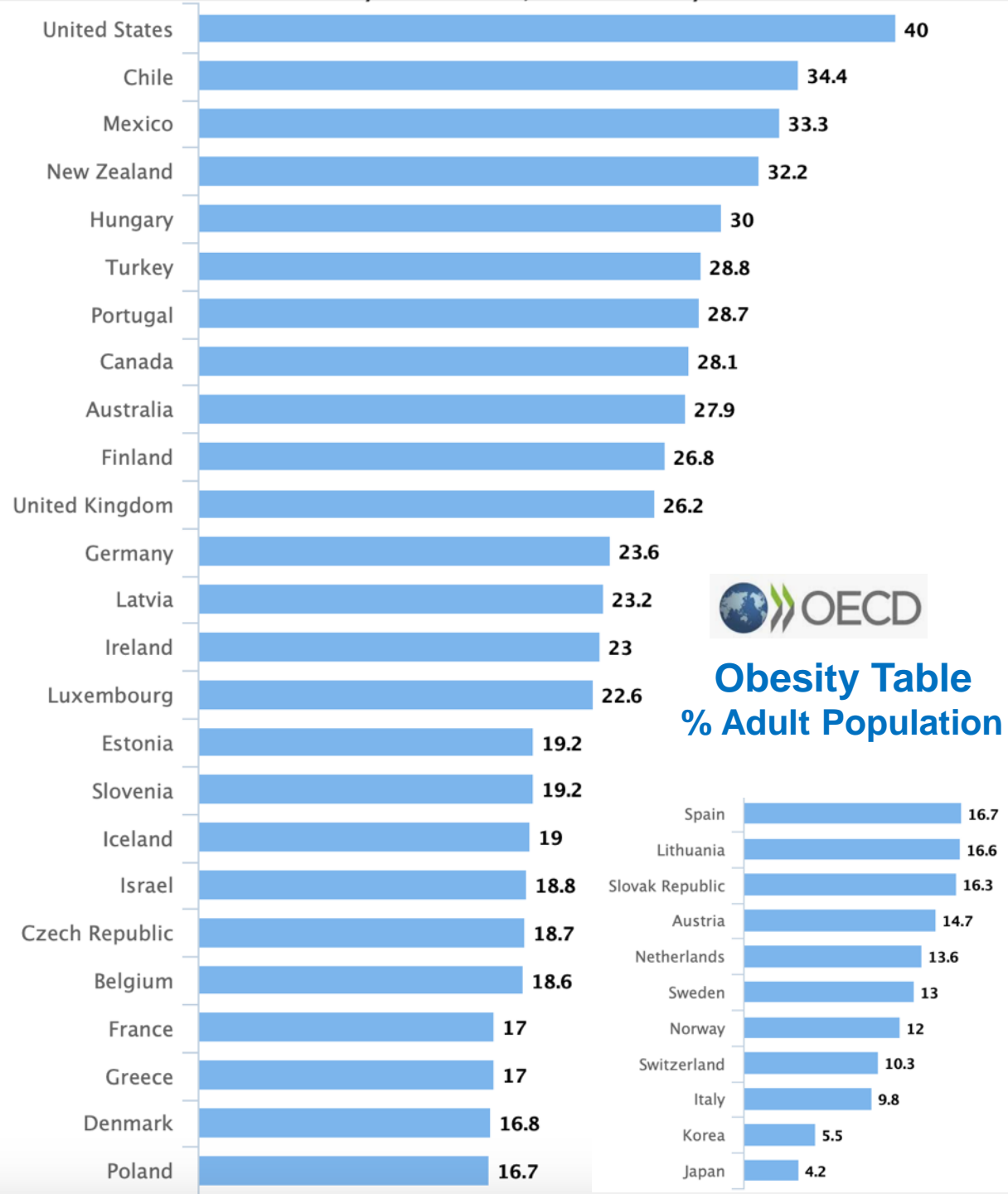
Economic cost

% of GDP



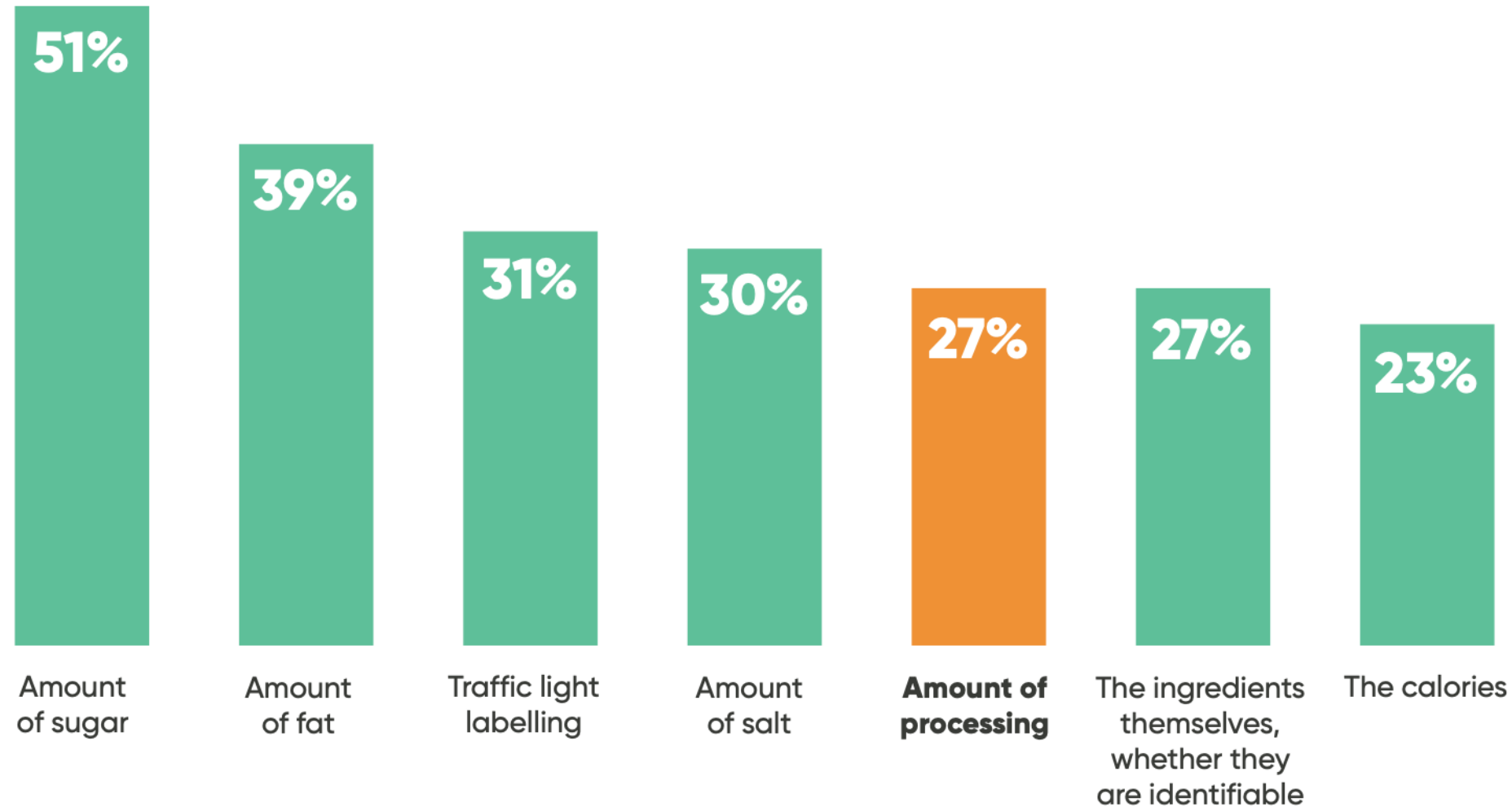
*Estimate

The Economist



Obesity Table % Adult Population

Indicators consumers use to work out if a food or drink item is healthy



Q: Which are the top three indicators you might use to work out if a food & drink item was healthy or not?

Ultra-processed foods

A consumer perspective

Published July 2023

Health from IGD

Nestlé debuts ‘breakthrough’ technology that reduces sugars in key ingredients

July 14th, 2023



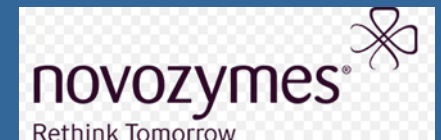
Nestlé has developed what it claims is a “versatile and cost-effective” **sugar reduction technology** that can be used across different product categories.

It uses an enzymatic process to reduce intrinsic sugar in ingredients such as malt, milk, and fruit juices by up to 30%, with “minimal impact on taste and texture”, according to Nestlé.



Novozymes says new ingredient can increase shelf life, cut sugar in baked goods

May 10th, 2023



The ingredients company also is pitching the ingredient as a way to reduce food waste.

Mars Wrigley launches first of its kind quartet of non-HFSS treats

May 2022



February 14th, 2023

Cadbury launches first range of non-HFSS chocolate



We're launching
8 non-HFSS
Snacks



Pic: Mondelez International

The Brain Drink

FOR BETTER BRAIN DAYS

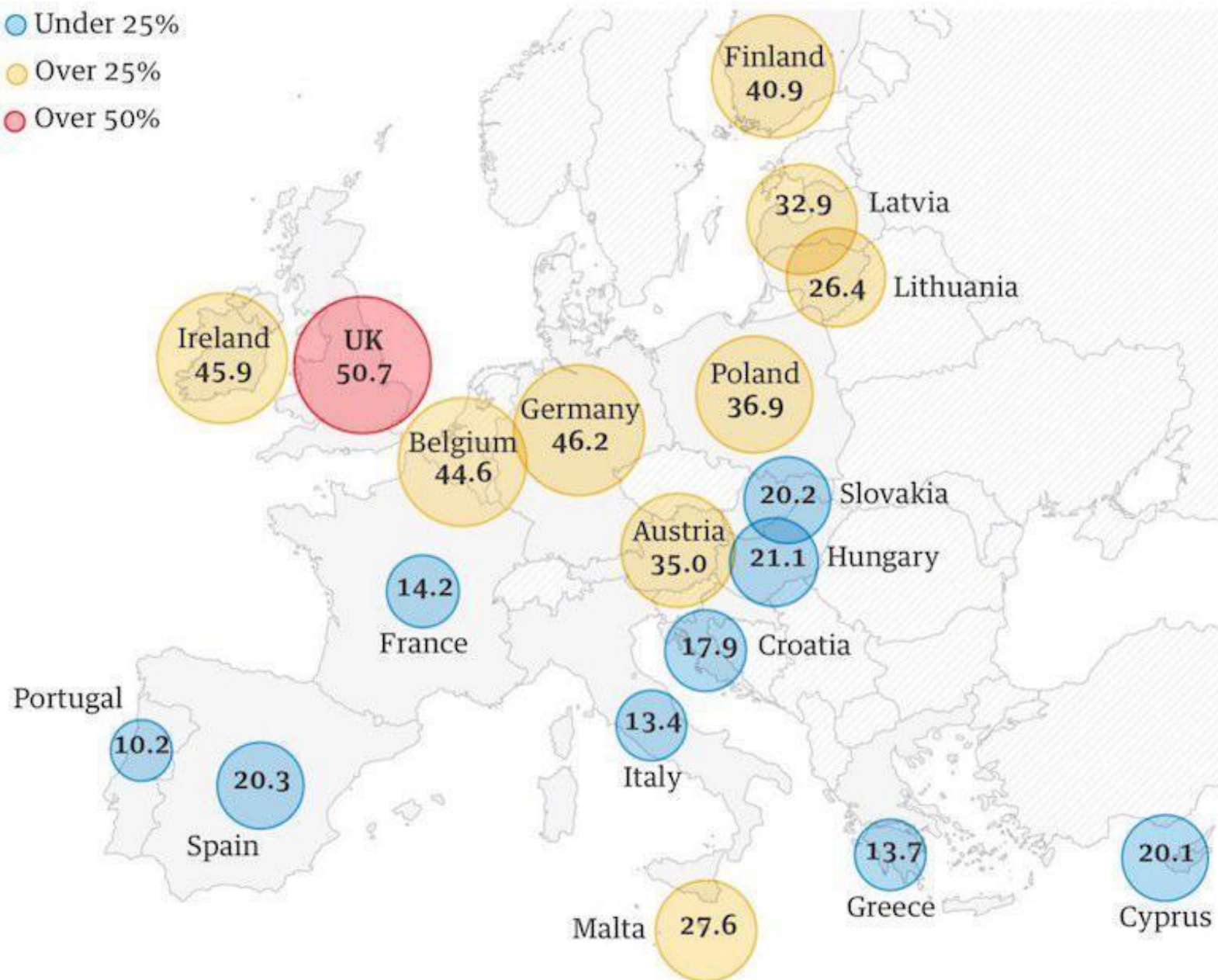
+ Focus + Mood



Stuffed Full of
Intellectual Property

Ultra-processed food as a % of household purchases

- Under 25%
- Over 25%
- Over 50%



Ultra-processed food raises risk of heart attack and stroke, two studies show

September 3rd, 2023

Research presented to annual meeting of European Society of Cardiology prompts calls for action

**There's a Move Underway
"Against" UPF. YES, it has
it's own acronym already!**

**Expect to See Lots of Discussion
on Nutrient Density of Food Products
as Healthy Eating/Diets Regain
Prominence as Inflation Moderates.**



DOSSIER DE PRESSE

LE **B.A.B.A**
du mieux!
MANGER!



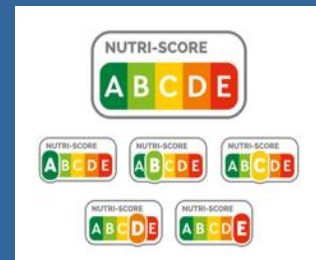
= **Goûter**
équilibré noté B

Voir composition détaillée à la fin



Carrefour and Colruyt Introducing Nutri-Scores On Private Label Products

How Would Your Products Score?



- The majority of Nestlé's traditional food and drinks do not meet a "recognised definition of health."
- Just 37% of its consumer food and beverage products meet international health standards.
- The global food company acknowledged the issue in an internal presentation seen by the Financial Times.



A

Nutri-Scores on Carrefour Meat Products

C



E





A “Red Traffic Light” Nutri-score Doesn’t Necessarily Turn Off the Consumer. There are Allowable, Guilt-Free, “! Deserve It” Treats!



Health Warnings on Front-of-Pack:
Latin America Big Deal; UK Modest;
USA Absent!



Environmental activists target UK's luxury department stores and retailers in 'milk pour'



“Terrified for my future’: climate crisis takes heavy toll on young people’s mental health

March 2023

The Guardian

Third of young people ‘very worried’ about climate change

March 21st, 2023

A survey commissioned by the Woodland Trust found there was more anxiety among 16-24-year-olds than among the over 65s

Driving Forces on the Health of the Planet?

Young climate activists join Greta Thunberg for first major Fridays for Future strikes of pandemic

September 2021



Sweden charges Greta Thunberg for blockading oil port

July 6th, 2023

Diets for the climate: UK government hit with legal challenge for neglecting critical cuts to meat & dairy

August 2022



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UN CLIMATE
CHANGE
CONFERENCE
UK 2021

IN PARTNERSHIP WITH ITALY

Agricultural Issues and COP 26: Some Outcomes Relevant to Agriculture

COP26: 105 countries pledge to cut methane emissions by 30 per cent

... from 2020 levels by 2030

GLASGOW LEADERS' DECLARATION ON FORESTS AND LAND USE

There'll be Much More
Naming & Shaming on
Methane Polluters in Future.
It's Looking Good for Seaweed Farming!



Methane seeps from waste at a dumping zone in Belgharia, India
Jonas Gratzner/LightRocket via Getty Images

Livestock Production and Food Waste



Satellites seek out methane
leaks from pipelines, oil
fields, landfills and farms



Government land grab? Dutch authorities offer to buy farms to fall in line with EU emission targets



29 Nov 2022 --- Dutch farmers are facing a new dilemma in the ongoing fight with government. They have been told to either make farms more sustainable or risk facing a compulsory buy-out situation – which would see the government directly buying livestock land to reduce “undesirable emissions” so that farms fall in line with EU targets.

EU okays \$1.61 billion for Dutch government to buy out farmers, reduce nitrogen May 3rd, 2023



Ireland considers “culling” 200,000 dairy cows

June 6th, 2023

The plan by the Irish government’s Department of Agriculture to cull 200,000 cows at a cost of €600 million over the next three years in order to meet carbon targets has made headlines in the European Media this week.



Jacinda Ardern’s ‘fart tax’ plans rip the guts out of small-town New Zealand, argue enraged farmers October 12th, 2022



New Zealand Farmers Welcome
Opposition’s Agriculture Emissions
Policy June 12th, 2023

PepsiCo, Walmart team on \$120M investment in regenerative agriculture

July 27th, 2023



Pepsi and Walmart are collaborating on a \$120M investment in regenerative agriculture. Courtesy of Walmart



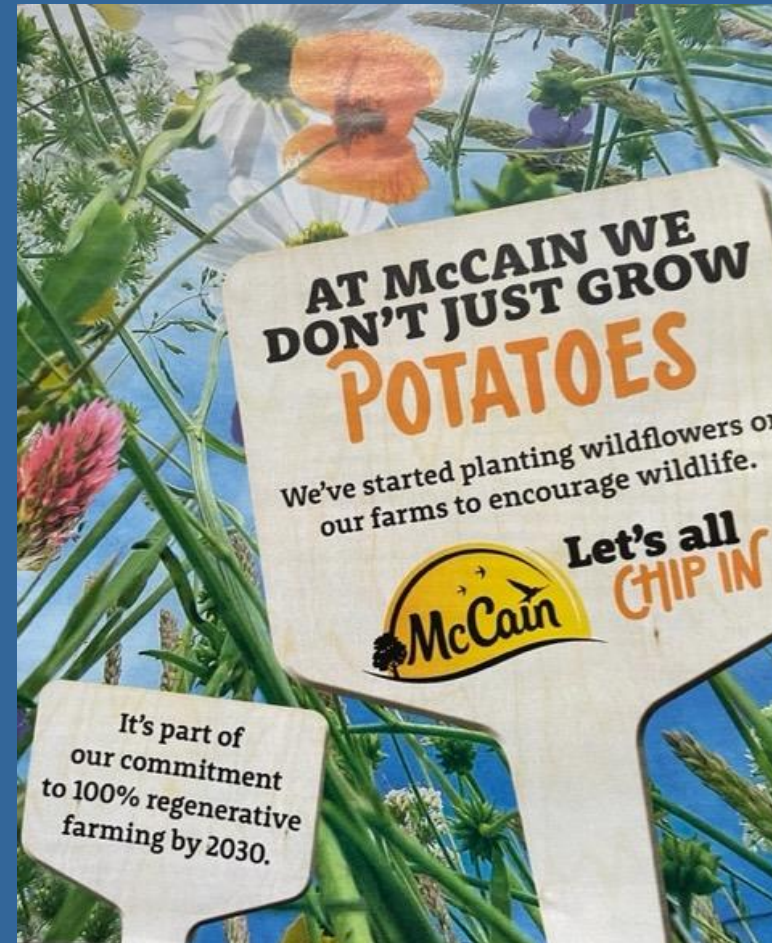
PepsiCo and Walmart announced a \$120 million investment on Wednesday to support North American farmers in the adoption of regenerative agriculture practices.

The seven-year collaboration is expected to improve soil health and water quality on more than 2 million acres of farmland, the companies said in a statement, delivering an expected 4 million metric tons in greenhouse gas emission reductions by 2030.

Jim Andrew, PepsiCo's chief sustainability officer, said in a statement that for regenerative agriculture to make business sense, farmers need economic, agronomic and cultural support.

"LET'S ALL CHIP IN" WITH MCCAIN'S REGENERATIVE AGRICULTURE CAMPAIGN TARGETING GEN Z

August 1st, 2023





Coles launches own brand of carbon neutral beef

April 21st, 2022

coles



Sainsbury's relaunches Taste the Difference beef with a 25% lower carbon footprint

September 18th, 2023



Sainsbury's



The premium Aberdeen Angus-based British beef range launches today in stores served by its northern depots, and was described by the retailer as "the largest low-carbon beef range ever produced in the UK".



Coop Sweden launches 'Methane-reduced' beef

June 24th, 2022



Step change for sustainable dairy? Danone pledges to cut methane emissions by 30%

In fact, Danone pledges the farmers producing its milk will cut methane emissions by 30% by 2030!



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Wind-powered cargo ship embarks on maiden voyage

August 22nd, 2023

Pyxis Ocean fitted with pioneering wind technology sets sail charting new lower-carbon path for global maritime industry

A container ship retrofitted with giant, rigid sails embarked on its maiden voyage yesterday (21 August), testing new technology that could bring cutting-edge wind propulsion to commercial cargo shipping.

Pyxis Ocean, owned by Mitsubishi Corp and chartered by shipping firm Cargill, is the first vessel to be retrofitted with two WindWings – large sails measuring up to 37.5m in height.

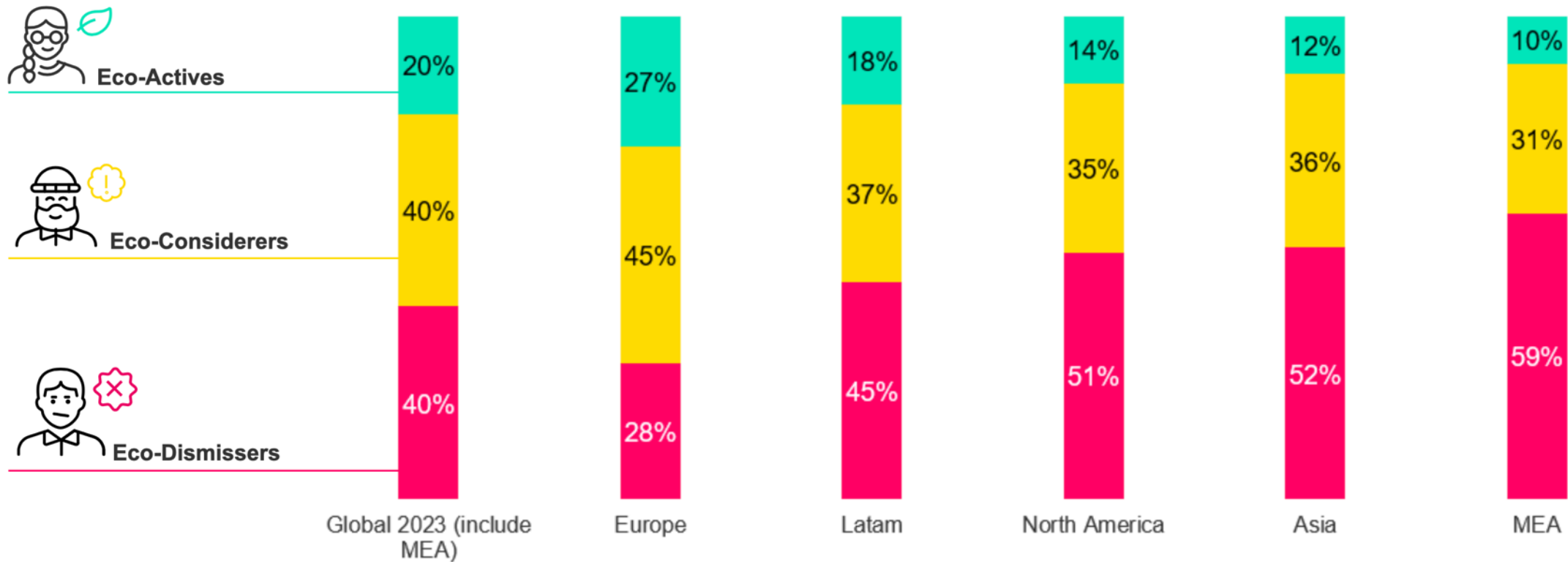


The wind-powered Pyxis Ocean set sail from China on 21 August

Image: Cargill

Global Differences by Region on Eco/Enviro-Concerns

Household Population share



KANTAR

Source: Worldpanel Division, Kantar, Europanel, GfK - Who Cares? Who Does? 2023
FMCG spending in year ending 2022
Global based on 35 countries

WCWD? 2023

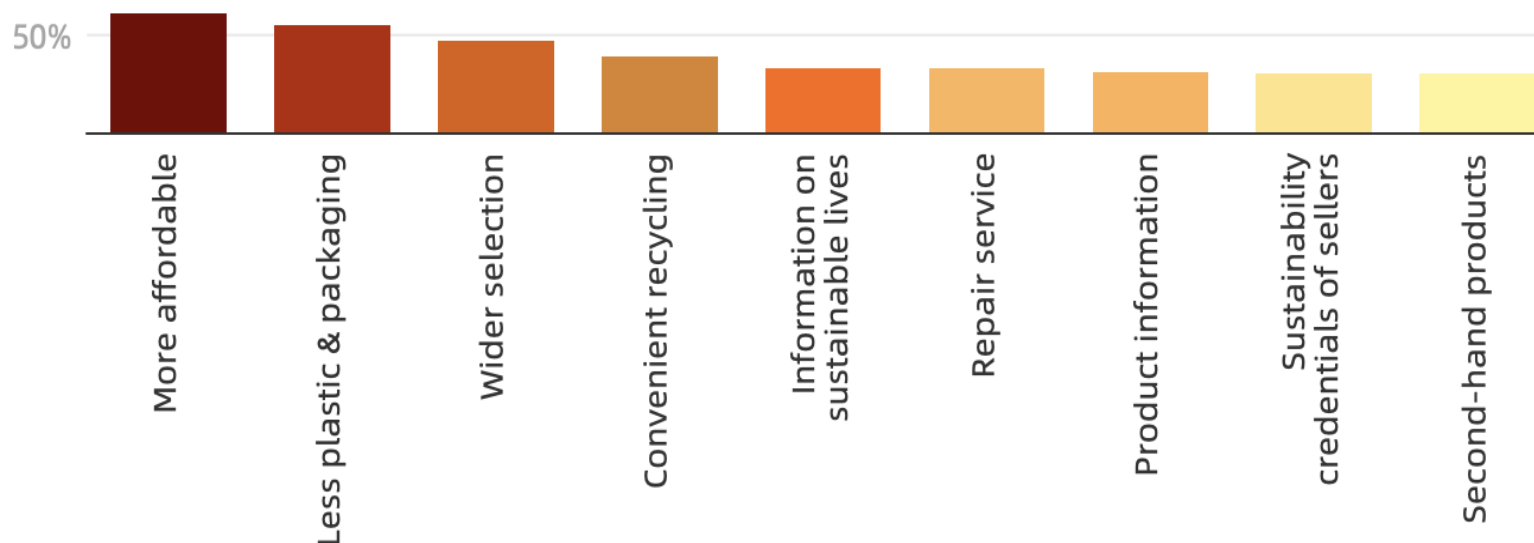
7 in 10 Consumers Globally Want to Live More Sustainably: Alibaba Survey

July 31st, 2023

- Emerging Asian markets are more likely to shop with sustainability in mind
- Affordability, convenience and information are the biggest barriers, say consumers

How Businesses Can Help Consumers Make Sustainable Choices

Consumers were asked which of the following, if any, would encourage you the most to live more sustainably? Select up to five ways



And Eco-Scores are Next Up!

LIDL TO HELP CONSUMERS GO GREENER WITH NEW ECO-SCORE TRIAL IN SCOTLAND

Eco-Score's European expansion: Lidl and Colruyt adopt environmental footprint labelling
April 11th, 2021



What will be Your Enviro-Score?



02 Feb 2023 --- A myriad of so-called eco-labels are being rolled out across various F&B products, but with no gold standard or strict rules governing precisely what the logos mean and what methodology is behind them, concerns are growing that they will confuse consumers and ultimately be counterproductive.



Alibaba Launches Carbon Ledger to Drive Eco-friendly Consumer Behavior

August 2022

Consumers will earn points for making low-carbon choices within Alibaba's ecosystem, such as buying energy-efficient appliances, recycling boxes, and declining disposable utensils with takeout orders. They can use the points to claim digital badges and shopping discounts on Alibaba's e-commerce platforms.

The launch brings the Hangzhou-based company closer to its **goal** of slashing carbon emissions by 1.5 gigatons across its digital ecosystem by 2035. Alibaba pioneered the concept Scope 3+ and has pledged to influence others to be greener as a platform operator.



More than 60% of UK consumers lack trust in carbon claims, report finds



Many consumers find carbon footprint labelling confusing and inconsistent. Credit: Getty / pixdeluxe

More than 60% of UK consumers lack trust in carbon footprint claims on food and drink packaging, new research from Bord Bia has revealed. July 6th, 2023

Bord Bia (the Irish Food Board) found that 61% of UK consumers do not fully believe the carbon footprint labelling found on grocery products.

Almost three quarters of those surveyed in the 'Consumer and carbon, cutting through the carbon jargon' insights report called for more transparency overall.

the Food Data Transparency Partnership



- To consult on implementing mandatory public reporting against a set of health metrics and explore a similar approach to sustainability and animal welfare.
- To provide consumers with the information to make more sustainable, ethical, and healthier food choices and incentivise industry to produce healthier and more ethical and sustainable food.

Senior representatives from across the food industry have formed a partnership to develop common metrics for carbon emission reporting from “Farm to Fork”. In time, similar initiatives will be started for health and animal welfare metrics. The intent is to bring comparability and transparency to “Green Reporting”.

June 20th, 2023

PepsiCo's Net Water Positive Vision

Reduce Use + Replenish More



Efficiency

Achieve **best-in-class¹** or **world-class²** water-use standards at all company-owned and third-party facilities by 2030

Over 11 billion
liters of water a year avoided³

50% reduction⁴
in water use at PepsiCo sites⁴

Nearly half
of sites located in high-
risk watersheds



Replenishment

Replenish more than **100% of water** used at all high-water-risk sites by 2030



Safe Water Access

Provide **100 million people** with safe water access by 2030



Alliance for Water Stewardship Standard

Adopt in **high-water-risk areas** where PepsiCo operates by 2025

¹ 1.2 liters of water per liter of beverage or 0.4 liters per kilogram of food (high-water-risk manufacturing sites only)

² 1.4 liters of water per liter of beverage or 0.6 liters of water per kilogram of food (all other manufacturing sites)

³ At company-owned manufacturing facilities in high-risk watersheds and compared to a 2015 baseline

⁴ Based on estimated reductions in water use at high-water-risk PepsiCo-owned facilities of 80% at snack facilities and 90% at beverage facilities against a 2015 baseline

⁵ At company-owned manufacturing facilities in high-risk watersheds and against a 2015 baseline



We're crafting
the foods
+ beverages
you love
**with less
water
than ever.**



PEPSICO



PEPSICO
FOUNDATION

We Feed Potential

Almonds: Angelic or Devilish?!

Imperial College
London

Have a paper-wrapped break with *KitKat*

January 11th, 2023



So, What Took You So Long?!

Smarties becomes the first global confectionery brand to switch to recyclable paper packaging

January 26th, 2021

Mars bar plastic wrapper swapped for paper May 2023



Mondelēz's Cadbury chooses recycled plastic over paper for new Dairy Milk chocolate wrappers

September 20th, 2021



Upcycled food launches leap as concerns around waste grow: report

April 29th, 2023



Launches of food and beverages containing upcycled ingredients saw a 122% compound annual growth rate in the five years ending third-quarter 2021, according to a report from Innova Market Insights. This figure was higher than products using recycled plastic in packaging (59%) and those carrying carbon-emissions claims (47%).

Nearly half of consumers surveyed by Innova said they are actively trying to cut food waste. The market research group also found that 62% of consumers are willing to pay more for food and beverage products that are dedicated to stopping food waste.

In 2015, Many Countries Signed Up to UN SDG 12.3: Cutting Per Capita Food Waste by 50% by 2030. We are HUGELY Behind Schedule. Reducing Food Waste Initiatives are Racing Up the Agenda for Consumers, Corporates and Governments.



Takeaway Sandwich Company with Community Values



URBAN GARDEN PROJECT

Towns and cities are amazing, vibrant places, full of interesting people, impressive buildings and beautiful green spaces. However, there are some parts of cities that are feeling a bit unloved and in need of a friendly helping hand to bring them to life. Well, that's where we come in.

July 27th, 2023



As well as sales growth,
Sustainability & Health
Credentials key attractions:
B Corp.; HFSS compliant.



Britvic announces acquisition of Jimmy's Iced Coffee

Beverage giant [Britvic](#) has announced the acquisition of UK-based ready-to-drink iced coffee brand [Jimmy's Iced Coffee](#).

According to Britvic, Jimmy's Iced Coffee is "the fastest growing RTD iced coffee brand in the segment," generating a retail sales value of £17 million in the year to June 2023, a 43% increase from the previous year.

Jimmy's coffees have fewer calories per serving than the category average, come in fully recyclable packaging and are HFSS-compliant.

Who Do Consumers Trust Most When Thinking About Their Food Across Europe?



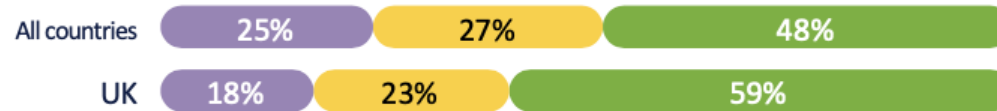
Trust in actors

● % expressing distrust ● % neutral ● % expressing trust

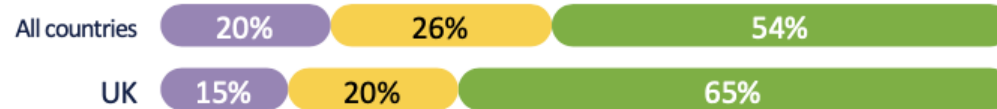
Trust in Farmers



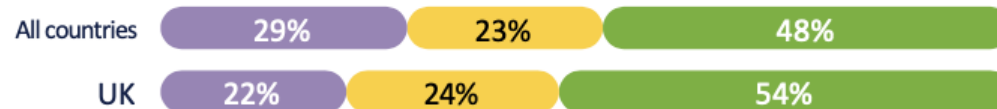
Trust in Manufacturers



Trust in Retailers



Trust in Authorities



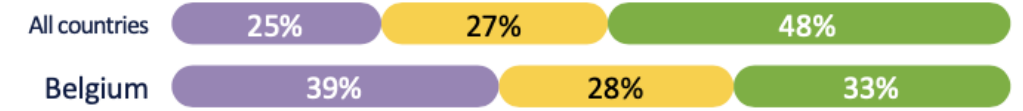
Trust in actors

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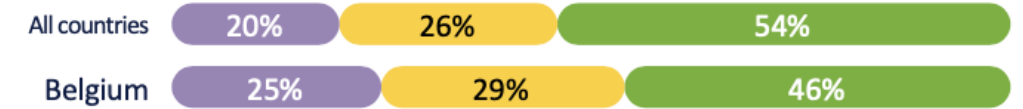
Trust in Farmers



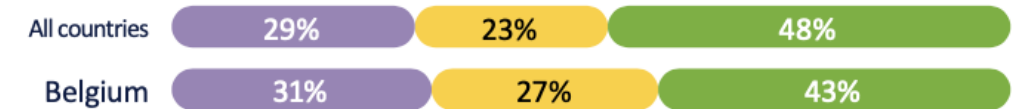
Trust in Manufacturers



Trust in Retailers

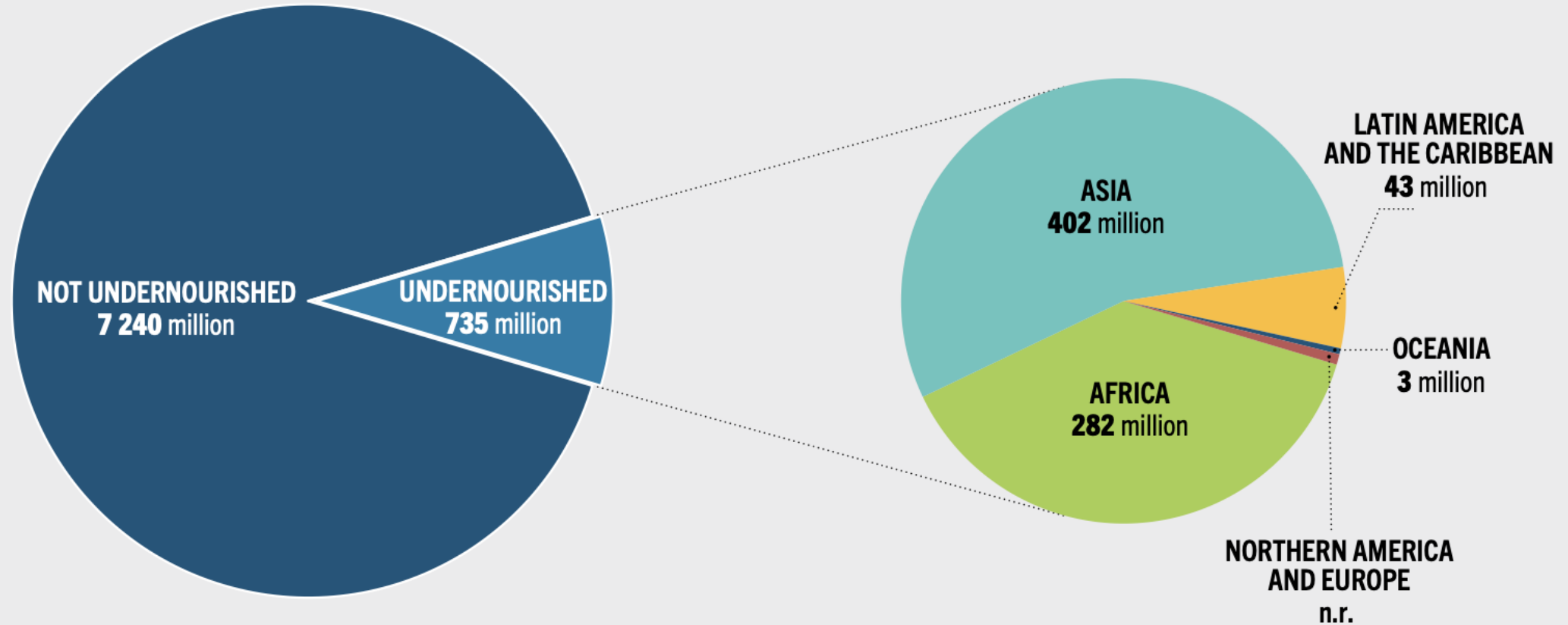


Trust in Authorities



Belgians are Much Less Trusting than Brits about Food Actors Past the Farm Gate!

FIGURE 3 IN 2022, ASIA WAS HOME TO 55 PERCENT (402 MILLION) OF THE PEOPLE IN THE WORLD AFFECTED BY HUNGER, WHILE MORE THAN 38 PERCENT (282 MILLION) LIVED IN AFRICA



NOTES: Projected values are based on the projected midranges. The full ranges of the projected 2022 values can be found in **Annex 2**.

n.r. = not reported, as the prevalence is less than 2.5 percent.

SOURCE: FAO. 2023. FAOSTAT: Suite of Food Security Indicators. In: *FAO*. [Cited 12 July 2023]. www.fao.org/faostat/en/#data/FS



2nd Place World Food Programme Food for Life © M Yousuf Tushar, Bangladesh

Happy With Food

Children are seen taking food which was supplied by NGOs and social organization days after a fire at a refugee camp in Ukhia, in the south-eastern Cox



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