

# Global Food Sustainability Outlook 2021

BORD BIA   
**Thinking  
House**





## *'It Is All Connected': Extreme Weather in the Age of Climate Change*

The storm that brought flooding and devastation to parts of Europe is the latest example of an extreme weather event. More are expected.

New York Times, 16 July  
2021

**Report warns climate change is  
'widespread, rapid'**

RTÉ.ie, 9 August 2021



# Poll

**How important is sustainability to your business' current strategy?**

*'It Is All Connected': Extreme Weather in the Age of Climate Change*

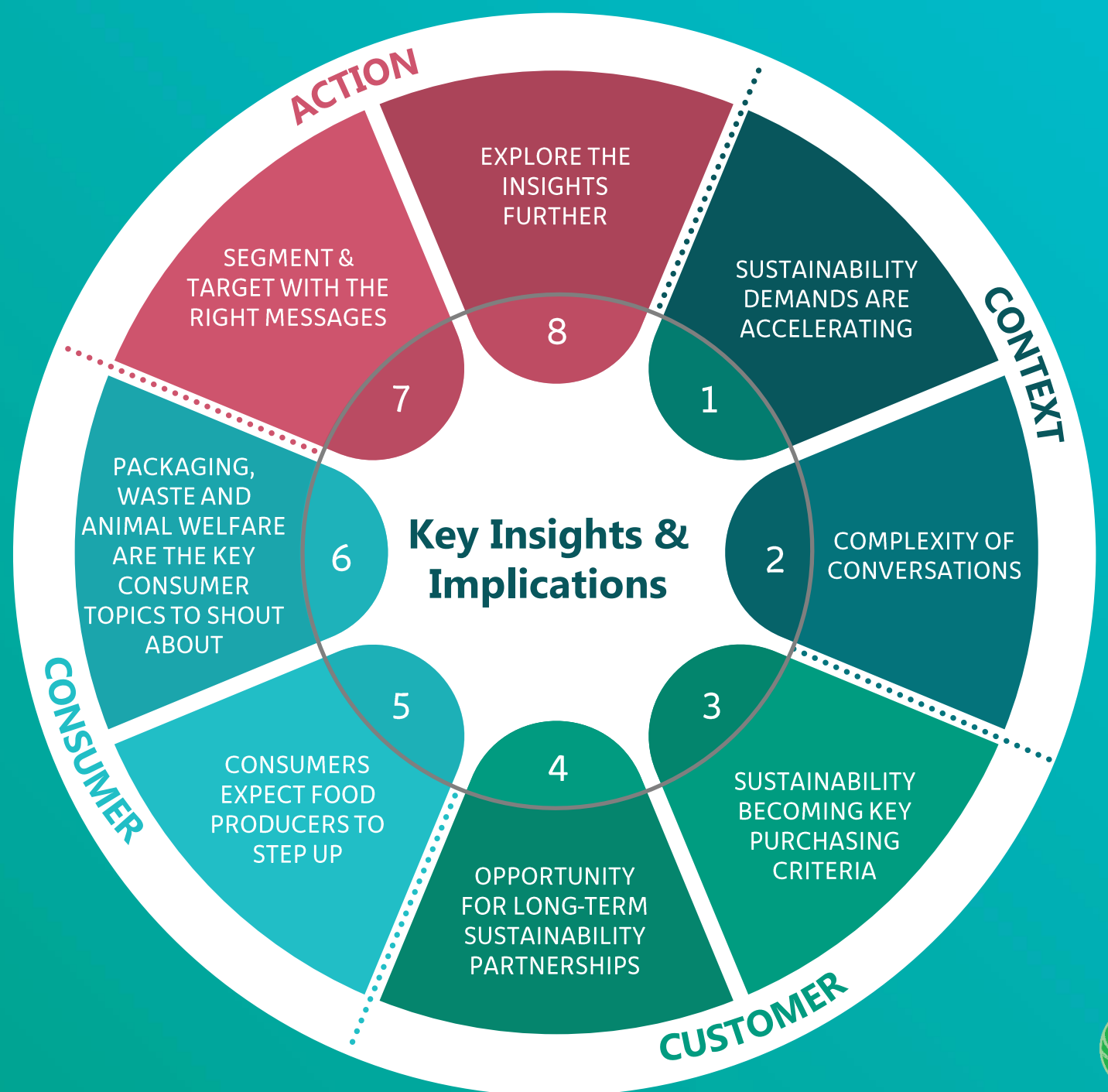
The storm that brought flooding and devastation to parts of Europe is the latest example of an extreme weather event. More are expected.

New York Times, 16 July 2021

Report warns climate change is 'widespread, rapid'

RTÉ.ie, 9 August 2021

# Key Insights & Implications





# Key Implication / Topic Sheet



**IMPLICATION / TOPIC :** \_\_\_\_\_



**WHAT:**

... ARE THE KEY INSIGHTS AND IMPLICATIONS

**WHO:**

... IS THIS MOST RELEVANT FOR (CUSTOMERS / CONSUMERS ETC...)

**WHERE:**

... WHAT MARKETS, CHANNELS OR SECTORS

**WHEN:**

... IS THIS IMMEDIATE OR AN EMERGING AREA OF FOCUS

**RATE YOUR CURRENT FOCUS / COMPETENCY?**

... HOW DO YOU CURRENTLY MEASURE UP AGAINST THE REQUIREMENTS OF THIS INSIGHT?

**ACTION REQUIRED?**

... WHAT KEY ACTIONS OR CHANGES WILL YOU PUT IN PLACE TO MITIGATE OR CAPITALISE ON THESE IMPLICATIONS?



# Context of research

The research set out to uncover the Sustainability Outlook from the perspective of three core groups:

## 1: MATERIALITY ASSESSMENT : THOUGHT LEADERS / STAKEHOLDERS

Including NGO's, opinion leaders,  
Policy groups, Clients and Bord Bia  
experts

AUDIT OF  
**60+**

PUBLISHED RESEARCH PIECES  
& 14 INTERVIEWS

## 2: CUSTOMERS

**A: Buyer Barometer** - multi-market  
quant barometer exploring views of  
buyers.

**B: Depth interviews** - multi-market  
qualitative interviews focusing more on  
more senior roles with a connection to  
the sustainability interview to give depth  
and context to sustainability within the  
customer organization.

**189**  
FOOD BUSINESS  
BAROMETER ACROSS  
9 MARKETS

**25**  
GLOBAL DEPTH  
INTERVIEWS WITH  
SENIOR FOOD  
BUSINESS LEADERS

## 3: CONSUMER

Multi-market quant survey testing  
attitudes and opinions of consumers  
aged 18-65 around sustainability

**11,000+**  
ONLINE CONSUMER SURVEYS  
ACROSS 13 MARKETS

# 1: MATERIALITY ASSESSMENT

## 14 in-depth interviews with:

- International think-tanks
- International NGOs
- EU policymakers
- Irish trade associations
- Origin Green companies
- Senior Bord Bia staff
- Origin Green Ambassadors

## Online survey with:

- Origin Green team in Bord Bia
- Origin Green Ambassadors

## Research Sources

- Over 60 research sources / documents





## 2(a): CUSTOMERS - DEPTHS

25+ Senior Leader Global depth interviews  
Europe (Irl, UK, Holland, Germany, Italy,  
France)  
US, UAE, China

### Sustainability Leaders

- Director of Sustainability and Public Affairs.
- Global Director, Sourcing and Operations Sustainability
- Sustainability Head

### Purchasing / Supply

- VP of International Market Merchandise
- Head of Global Procurement
- Supply Chain Manager

### General Leadership

- COO - Global Operations Director
- Chief Executive Officer



vermaat



## 2(a): CUSTOMERS - BAROMETER

N=189 interviews conducted in total amongst those responsible for purchasing/sourcing food and beverage items and/or responsible for sustainability and CSR policies in relation to food and beverage within their organisation.

All businesses are currently importing food and drinks products and have an annual turnover in excess of €50m

Mix of channels across manufacturing, food service and retail with importation of goods in key sectors such as beef, lamb, seafood, dairy, poultry and other consumer goods.

Mix of roles across the organisation including:

- Purchasing Directors
- Operational Directors
- Head Buyers
- CSR Directors
- Category Managers/Directors

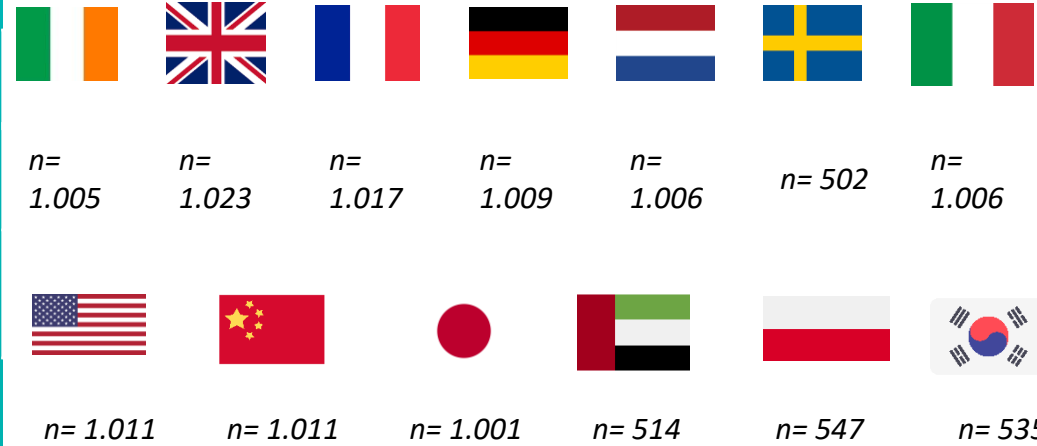
Interviews conducted across  
9 priority markets:



### 3: CONSUMER QUANTITY

This research was conducted online among a total **Global Sample of n=11,187 adults aged 18-65.**

The samples were quota controlled to reflect the population of each market based on sex, age, social class, and region.





# The Key Topics of Sustainability

From an extensive audit of published research and perspectives on Food Sustainability we uncovered the Top 25 sustainability topics

The list is broad but not exhaustive - it captures the most commonly referenced items, all items are seen as important



1. Greenhouse gas emissions
2. Climate change adaptation
3. Energy and renewables
4. Water availability and quality
5. Biodiversity
6. Deforestation
7. Land usage
8. Food loss and food waste
9. Sustainable fisheries
10. Sustainable packaging
11. Organic farming and food production
12. Regenerative agriculture and soil health
13. Circular and Bio economy
14. Grass-fed



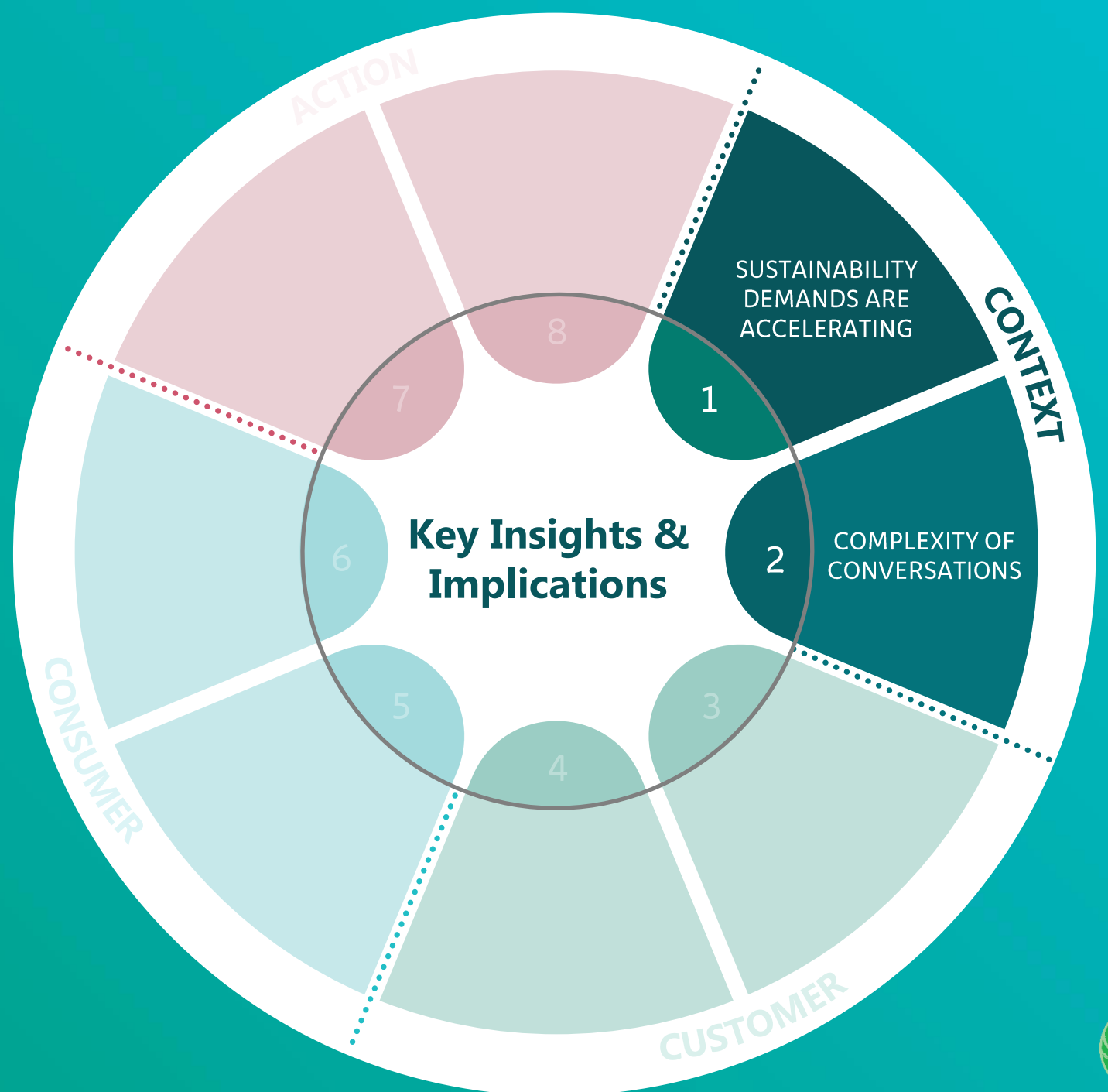
15. Animal health and welfare
16. Human health and nutrition
17. Food safety and quality
18. Product labelling and traceability
19. Alternative protein
20. Human and labour rights



21. Food security
22. Digital technology
23. Sustainable livelihoods and a 'just transition'
24. Market opportunity
25. Skills and training

# Key Insights & Implications

## Context



# The sustainability agenda is accelerating

## Insight

The food and drink sustainability landscape is accelerating - and another tipping point is coming - more will be expected and demanded from customers and consumers.

75%

of consumers globally have made an effort to buy more sustainably-produced food and drink in the last 12 months.



# The Food sustainability landscape:

## Dynamic and accelerating

The sustainability agenda has accelerated over the past 5 years.

This is a forward moving spectrum - all respondents cite an acceleration which will continue over the coming years.





3 in 4 trade interviewees say sustainability is important to their business

Almost 2 in 3 say it's important to their role

### Importance of Sustainability...

To your business

75%

To your role within the business

64%

To your consumers

61%





87%

Say they have made some effort to reduce their food waste in the last 12 months

77%

Say they have made some effort to buy products with less packaging in the last 12 months

75%

Say they have made some effort to buy more sustainably-produced products in the last 12 months



# Carbon Numbers & Eco-Scores will change the game

## **Carrefour piloting eco scores on ecommerce platforms**

(IGD, 2021)

## **Colruyt introducing eco scores for private label products**

(IGD, 2021)

## **Quorn introducing carbon labelling for their products**

(The Guardian, 2021)



The sustainability agenda is accelerating

# keep pace or risk being left behind

## Insight

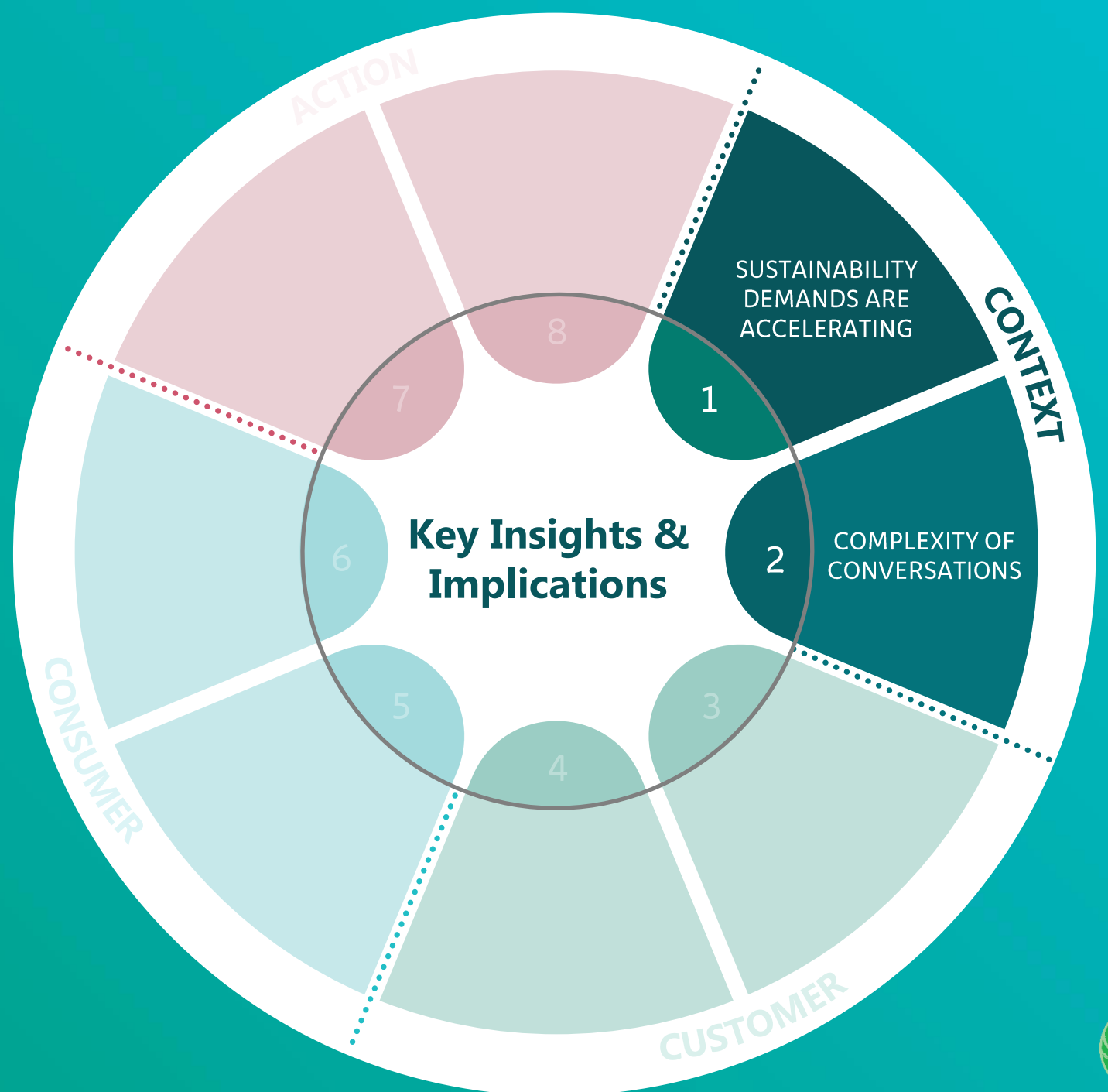
The food and drink sustainability agenda is accelerating - and another tipping point is coming - more will be expected and demanded from customers and consumers.

## Implications

- The industry must constantly innovate to stay ahead.
- Sustainability must be a core priority for your business as more pressure comes.
- Embrace sustainability in consumer and customer strategy.
- Essential to stay keenly close to customer and consumer trends.

# Key Insights & Implications

## Context





# Communicating is complex and has to be targeted correctly

## Insight

There are multiple sustainability conversations going on

- amongst different spheres and groups
- and even by topic there is nuance and complexity

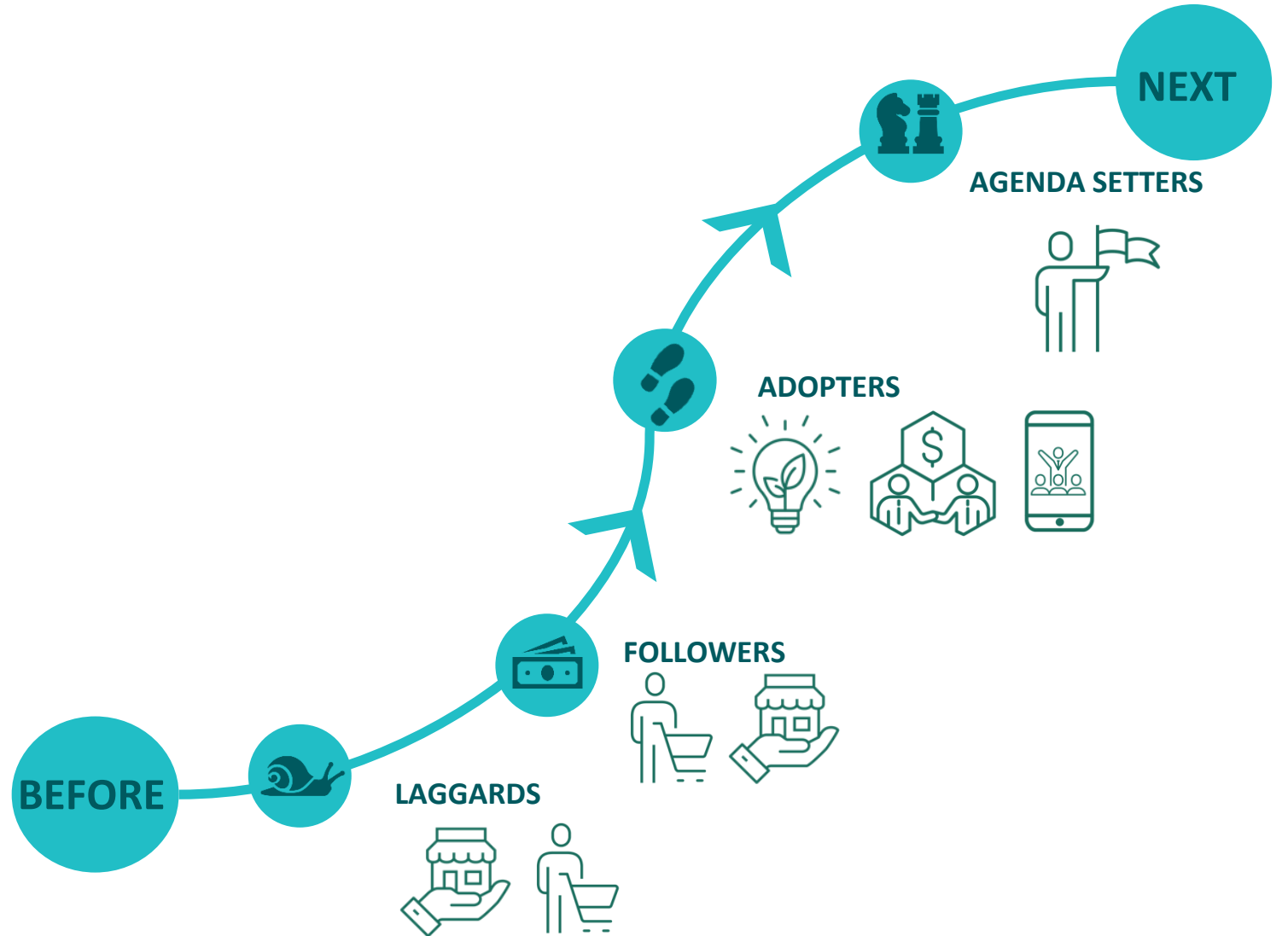
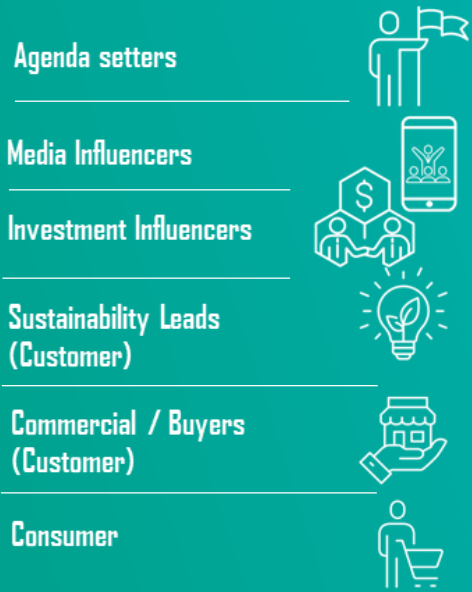
## Signal: Multiple Topics

Our Desk research of over 60+ research topics identified 25+ consistent topics associated with sustainability.

 <p>Environmental Sustainability</p>	<ol style="list-style-type: none"> <li>1. Greenhouse gas emissions</li> <li>2. Climate change adaptation</li> <li>3. Energy and renewables</li> <li>4. Water availability and quality</li> <li>5. Biodiversity</li> <li>6. Deforestation</li> <li>7. Land usage</li> </ol>	<ol style="list-style-type: none"> <li>8. Food loss and food waste</li> <li>9. Sustainable fisheries</li> <li>10. Sustainable packaging</li> <li>11. Organic farming and food production</li> <li>12. Regenerative agriculture and soil health</li> <li>13. Circular and Bio economy</li> <li>14. Grass-fed</li> </ol>
 <p>Social Sustainability</p>	<ol style="list-style-type: none"> <li>15. Animal health and welfare</li> <li>16. Human health and nutrition</li> <li>17. Food safety and quality</li> <li>18. Product labelling and traceability</li> <li>19. Alternative protein</li> <li>20. Human and labour rights</li> </ol>	
 <p>Economic Resilience</p>	<ol style="list-style-type: none"> <li>21. Food security</li> <li>22. Digital technology</li> <li>23. Sustainable livelihoods and a 'just transition'</li> <li>24. Market opportunity</li> <li>25. Skills and training</li> </ol>	

# The Food sustainability landscape & Key Players: Tiered and Adoption driven

The sustainability eco-system is driven by influence with agenda setters the catalyst actors and media / influencers and now investment influencers exerting significant influence on business and consumers.



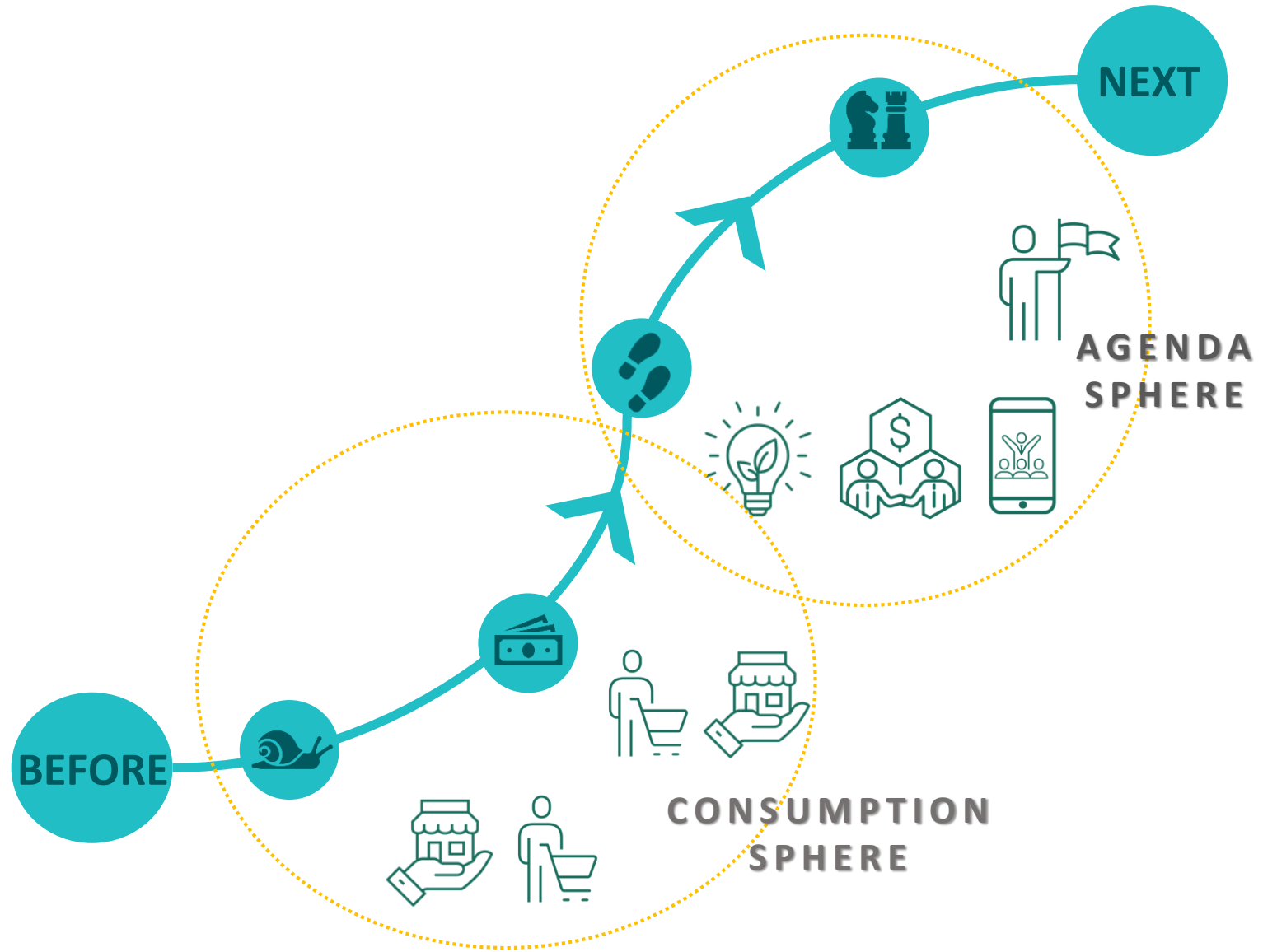
# There are two clear “spheres of sustainability”

## AGENDA SPHERE

Led by the agenda setters and includes sustainability leads - their view of the world is more holistic & complex covering multiple factors.

## CONSUMPTION SPHERE

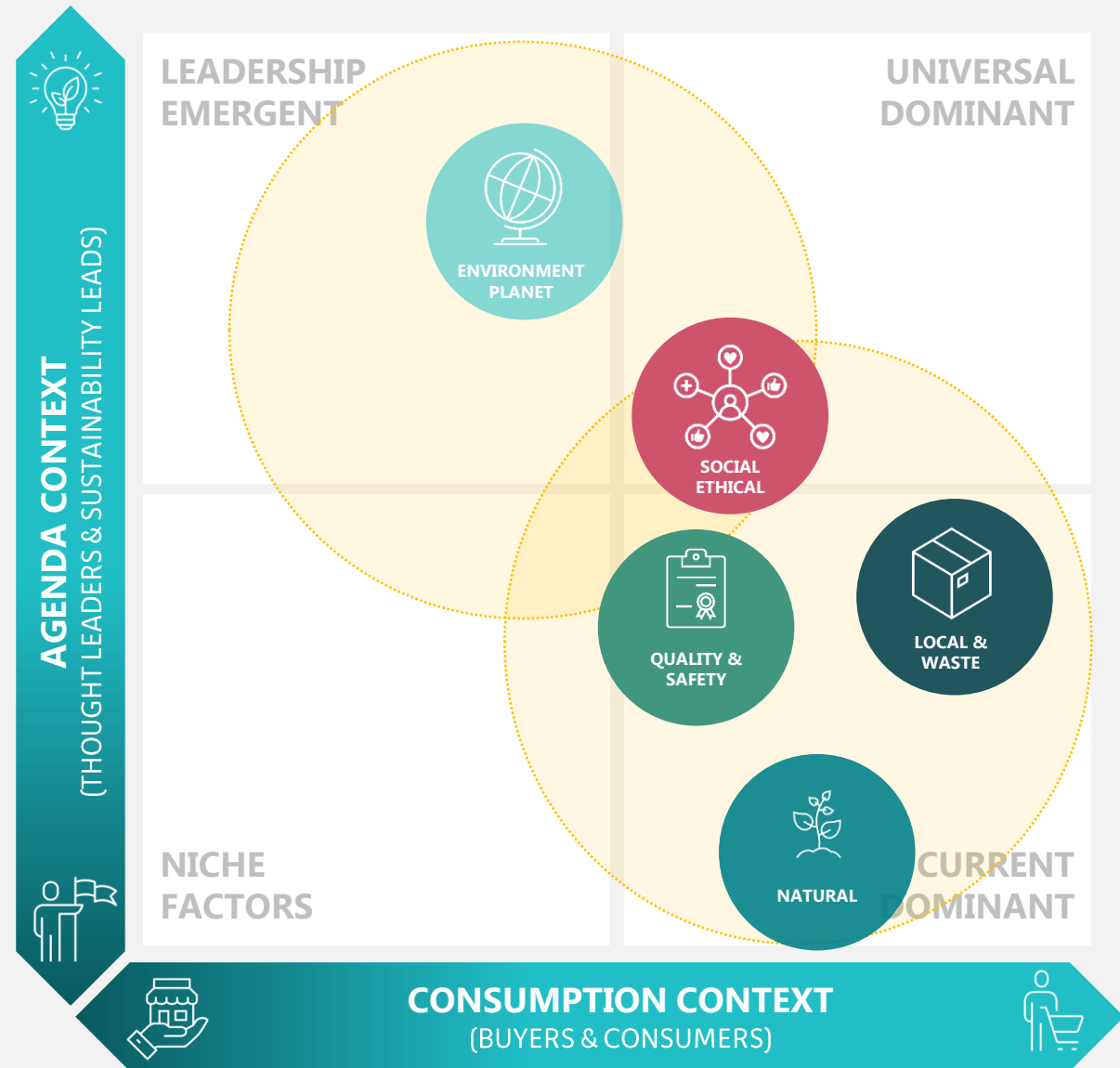
Principally around consumers and the buying functions within food businesses - their view is narrow, more immediate & simpler, covering fewer, more tangible and accessible factors





# Two spheres dictate opportunity in two conversations

- Agenda setters (& in cases sustainability leads) are focused on environmental topics.
- There is a shared agenda around Social Ethical topics and topics like sustainability packaging and animal welfare, with welfare standing out when it comes to dairy and meat.
- Quality and Safety are shared topics for the buyers and consumers.
- Consumers have a high focus around Natural.





Communicating is complex and has to be targeted correctly -

# arm yourselves with the right messages

## Insight

There are multiple sustainability conversations going on

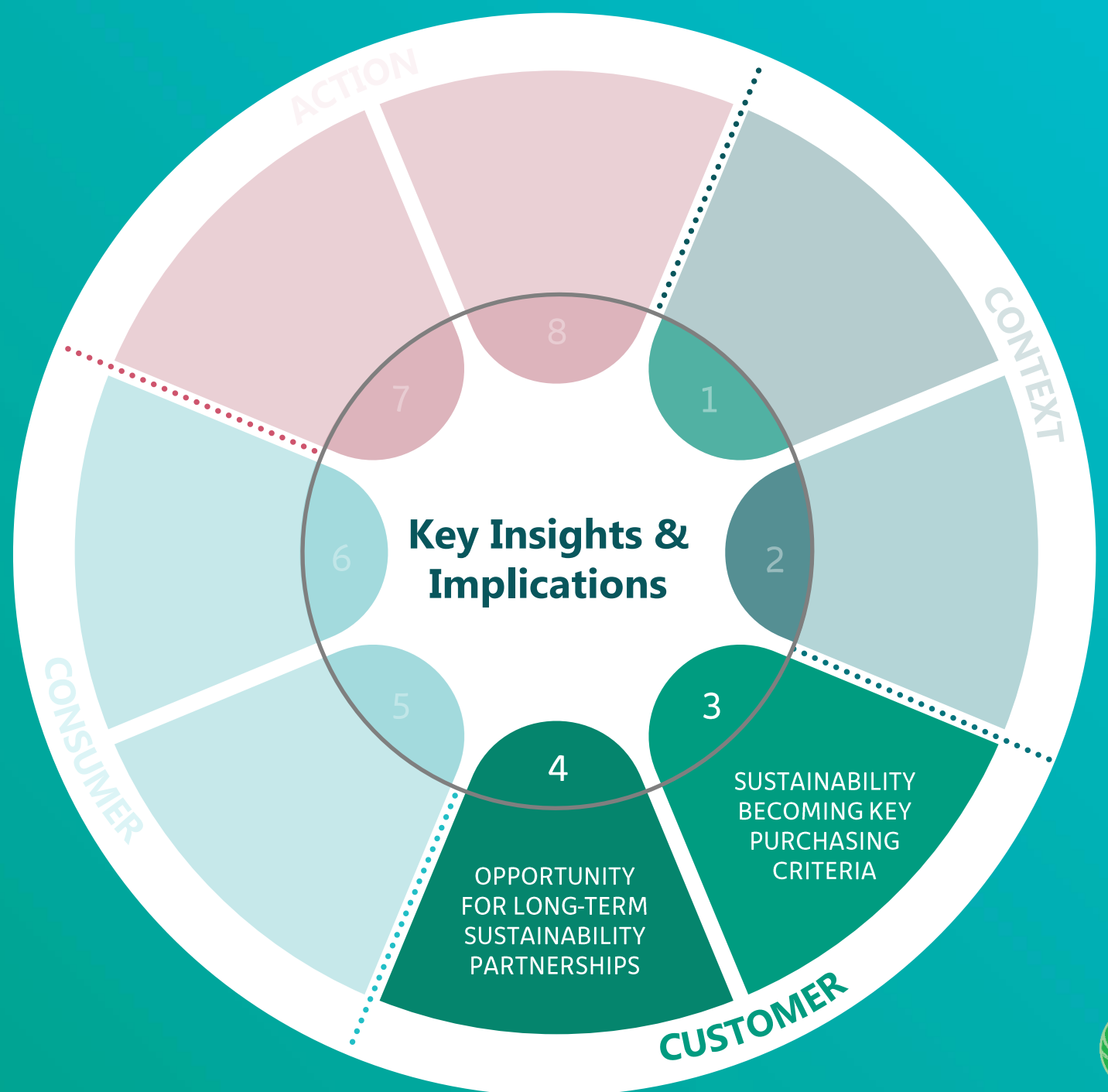
- amongst different spheres and groups.
- and even by topic there is nuance and complexity.

## Implication

- Ensure you are armed with the right messages for your audience.
- Use this research to segment your audience and understand the messages and topics that resonate best.
- Beware the green-washing radar.

# Key Insights & Implications

# Customer





# Sustainability becoming a core purchasing criteria

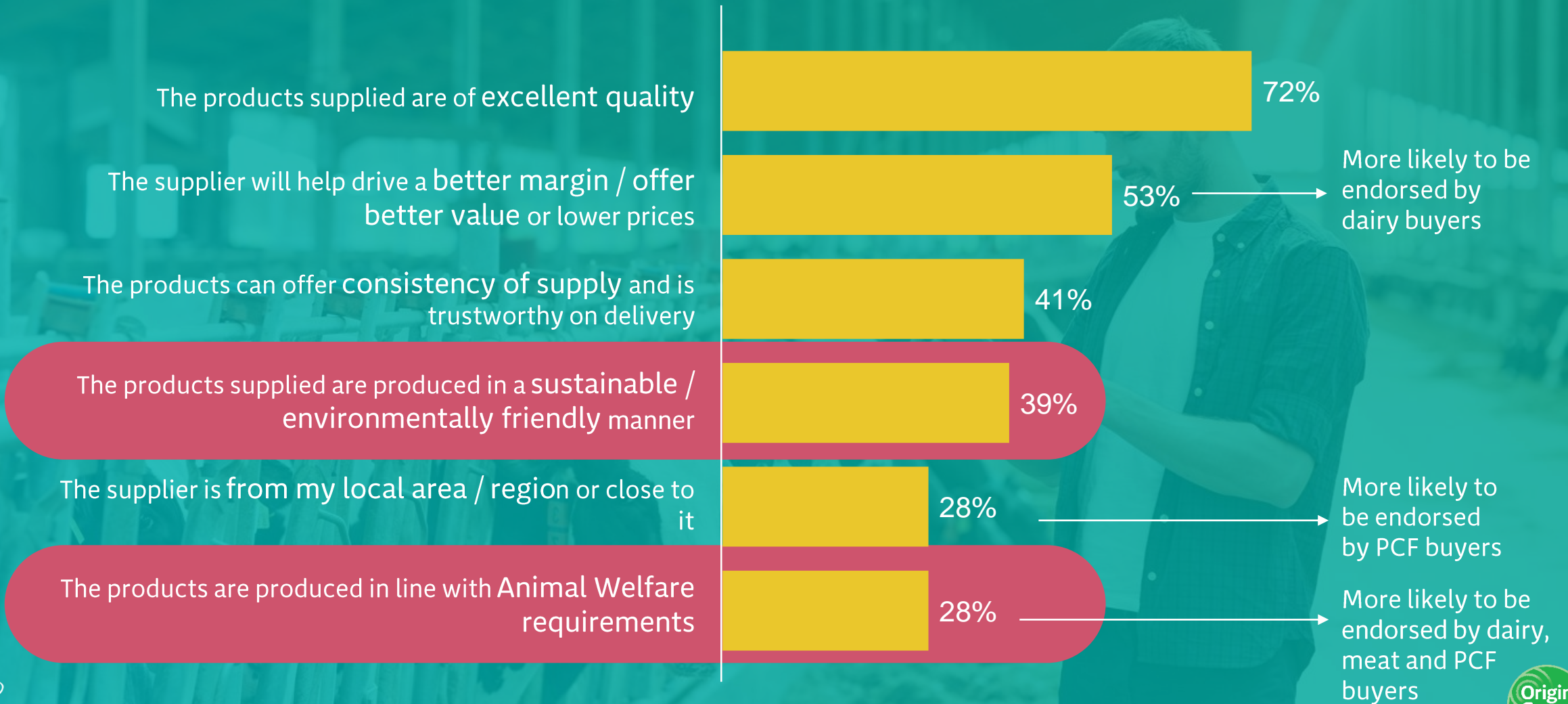
## Insight

Sustainability is coming towards the top priorities when choosing a supplier - especially for meat and dairy buyers

# 51%

of buyers interviewed said sustainability was “integral” to their business

# 2 in 5 say sustainability is one of the most important factors when choosing a supplier



(Base: Lot 2 Barometer Survey n=189)



# Majority want suppliers with strong sustainability credentials

Importance of having suppliers with strong sustainability credentials

72%

Higher amongst European businesses

The Opportunity Gap

As such, just over 4 in 10 (41%) claim that all or the majority of suppliers they work with have sustainability accreditations

Lower amongst those importing dairy products

(Base: Buyer Barometer Survey n=189)

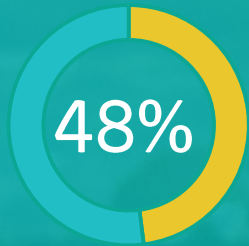


# Origin Green can encourage business in core sectors

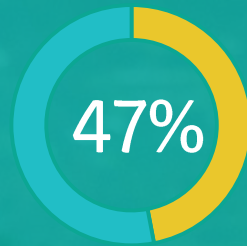
The Origin Green programme would encourage me to do business with Irish food and drink suppliers

**% Agree**

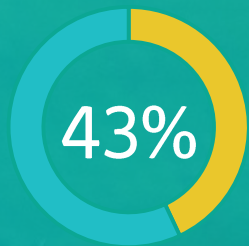
Dairy Buyers



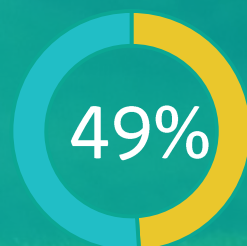
Meat Buyers



PCF Buyers



European buyers





# Sustainability becoming a core purchasing criteria

## Insight

Sustainability is coming towards the top priorities when choosing a supplier - especially for meat and dairy buyers.

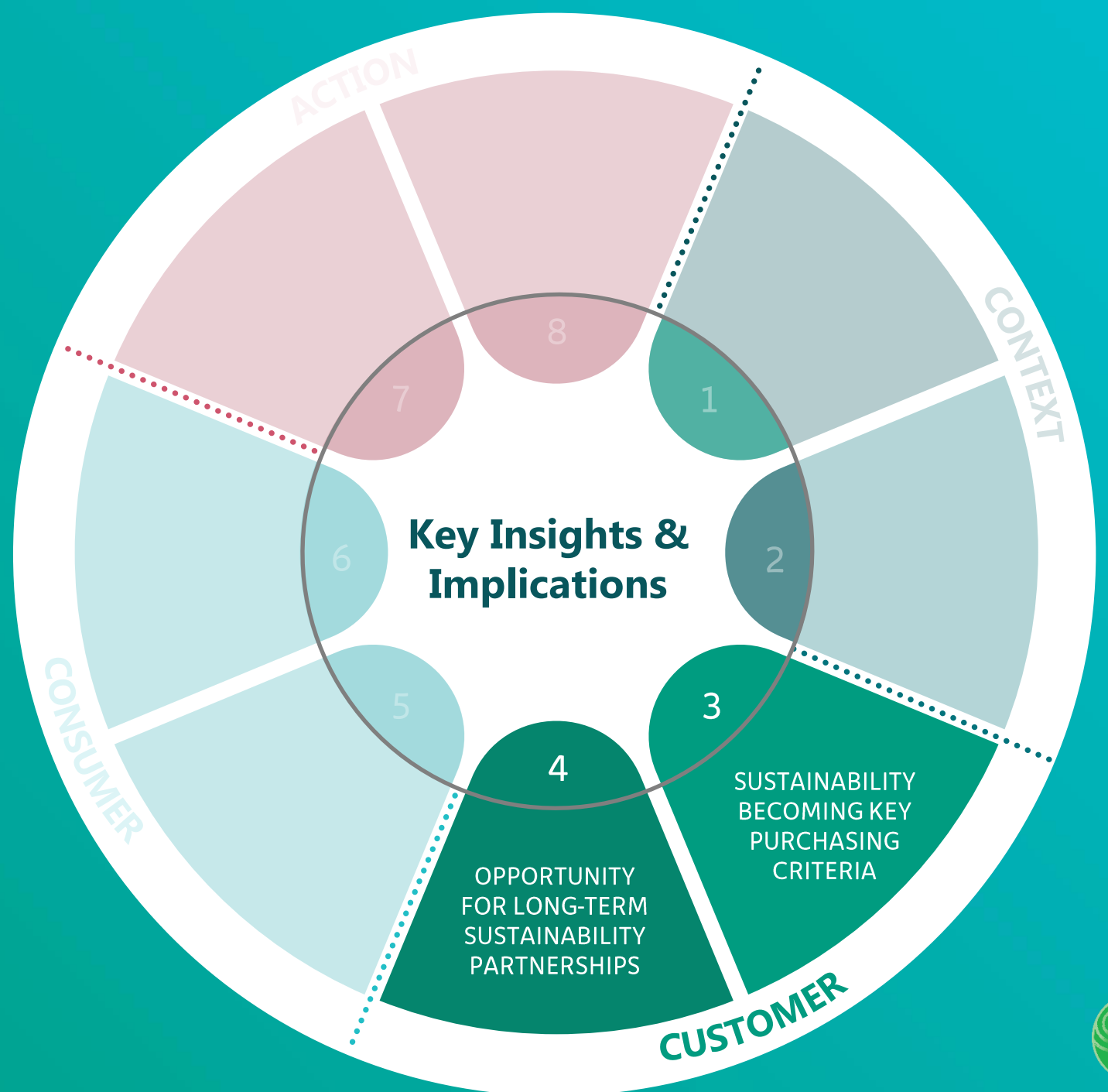
## Implications

- Dairy and meat suppliers have to be sustainability leaders.
- Communicate Origin Green clearly to suppliers.
- Make sure you can emphasise your sustainability benefit.



# Key Insights & Implications

# Customer



# Opportunity for long-term customer partnerships through sustainability



## Insight

Embracing sustainability opens the door to long-term customer partnerships

**“(in the future) ...with meat and vegetables, especially the common ones, you’re getting to integrated supply chains with dedicated farmers”**

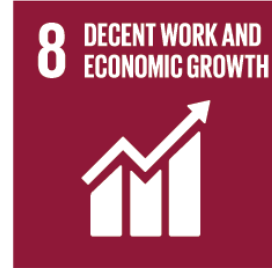
Director of Food Service - North European Retailer

# Get to know your customers' sustainability plans



Customers are organising sustainability plans aligned with mainstream frameworks including:

- SDG's (sustainable Development Goals).
- People / Planet / Profit (or similar).
- ESG (Environmental Social Governance).





# Partnering to Win

“it is not enough that you have a stamp [credential] anymore. You need to share with me all this data on a regular basis ... then this data is going to be assessed and analysed to meet the projects [targets/kpis]”

Sustainability lead - Global Fast Food



# Opportunity for long-term customer partnerships through sustainability



## Insight

Embracing sustainability opens the door to long-term customer partnerships.

## Implications

Significant opportunity but key requirements include:

- Demonstrable evidence of shared topic commitment.
- Data point openness and proof.
- Openness to sharing data and the sustainability mindset.



# Poll

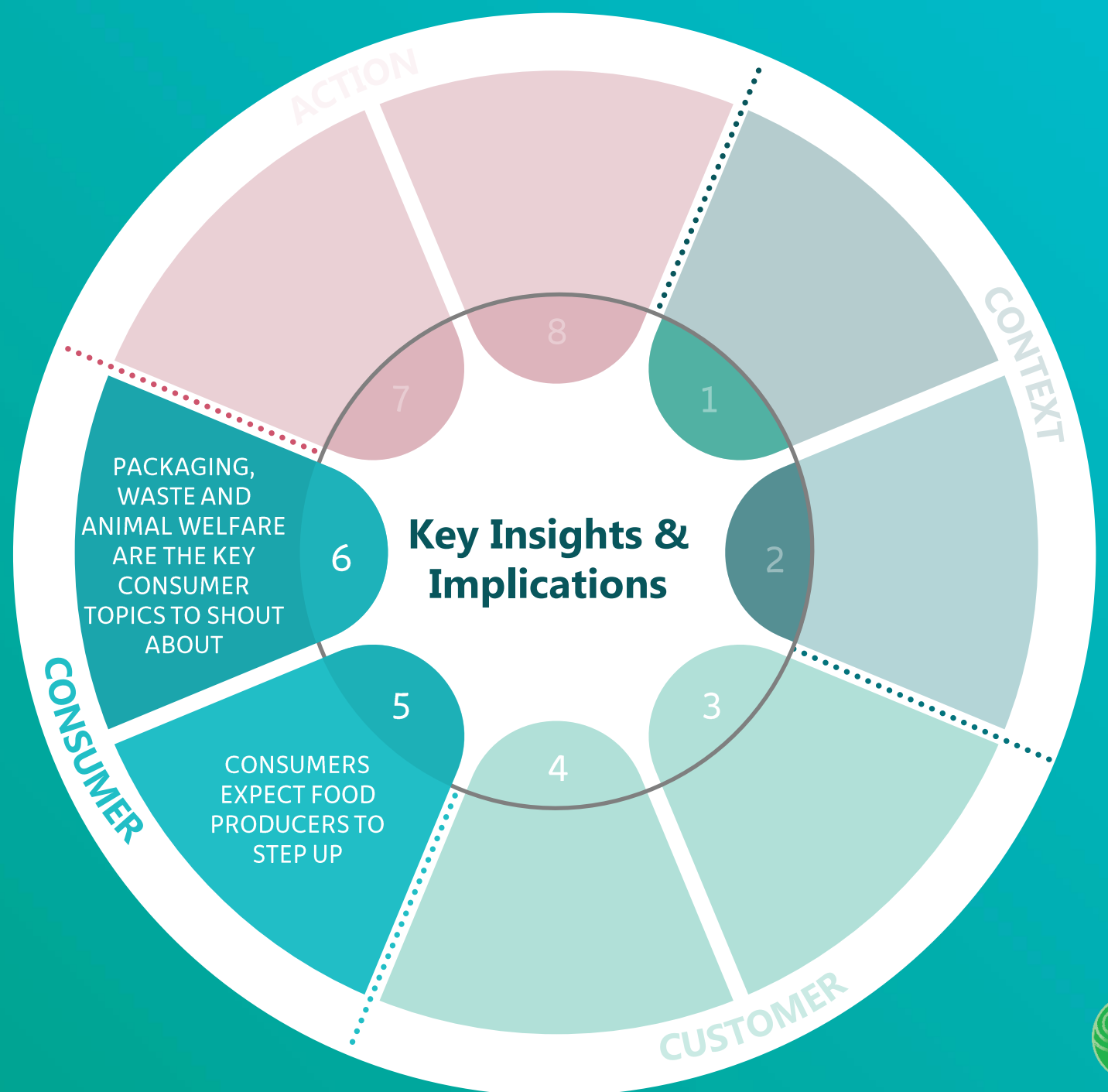
**Who does the consumer think is most responsible for making food and drink more sustainable?**





# Key Insights & Implications

# Consumer



# Consumers expect producers to step up



## Insight

Consumers want to make more sustainable choices in the future and expect food producers to help them do that.

# 61%

Say it will become more important to them to buy more sustainably-produced products in the next 3 years.





# Consumer puts responsibility for improving food sustainability on the food producer above anyone else

(Base: All Consumers, n=11,187)



QR1. Who do you feel is responsible for improving sustainability when it comes to food and drink?





81%

Say everyone needs to do their bit to make more sustainable choices

73%

Say they are willing to make changes to their lifestyle to be more sustainable

72%

Say they'd like to buy more sustainably-produced food but it is too expensive



# Consumers want to make more sustainable choices, and expect producers to step up



## Insight

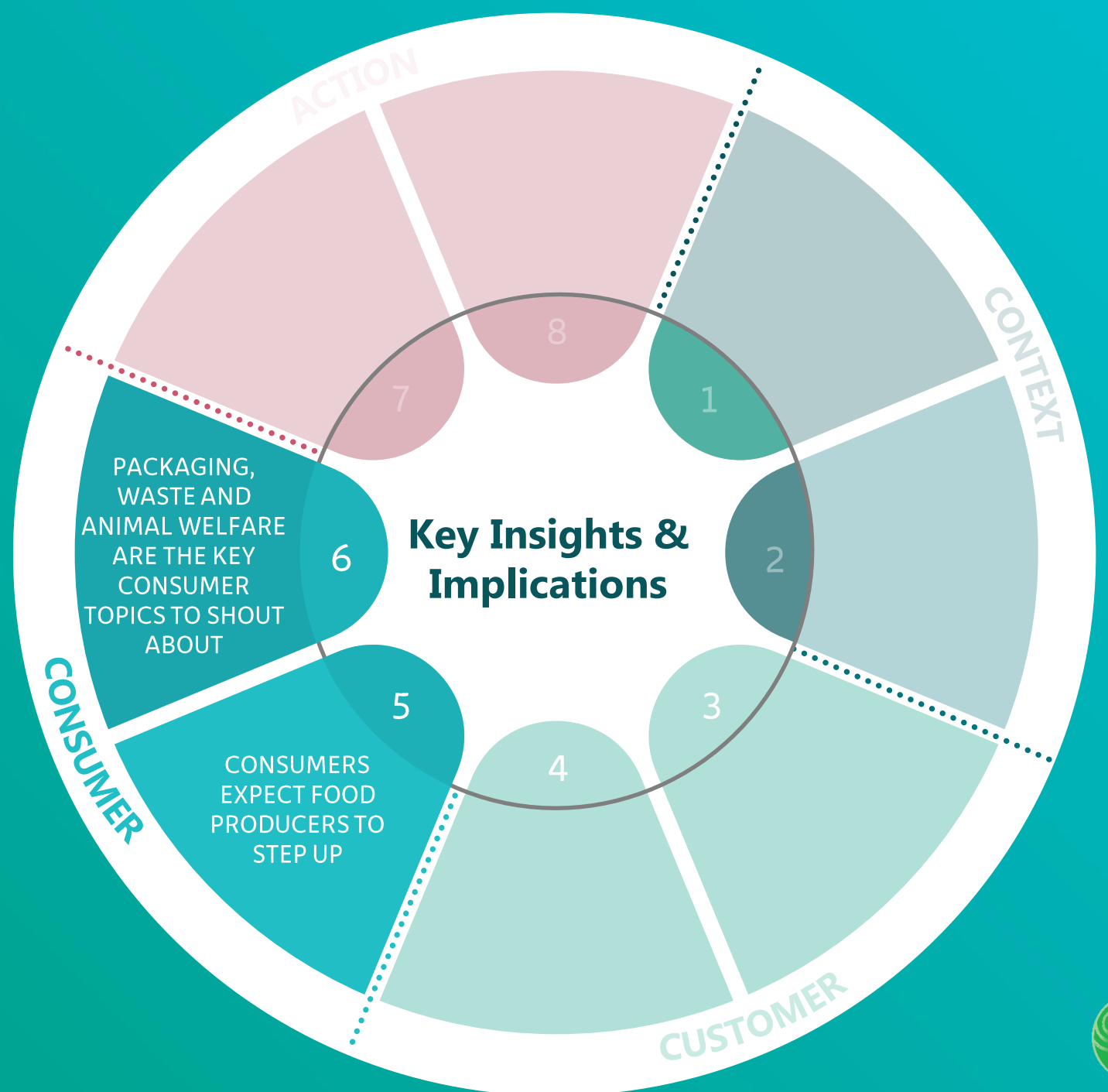
Consumers want to make more sustainable choices in the future and expect food producers to help them do that.

## Implications

- Brands that help consumers be more sustainable will win
- Make sustainable food and drink more accessible
- Communicate the value of sustainability

# Key Insights & Implications

# Consumer





# Packaging, waste, naturalness and welfare are the key consumer topics to shout about

6. PACKAGING, WASTE AND ANIMAL WELFARE ARE THE KEY CONSUMER TOPICS TO SHOUT ABOUT

## Insight

Sustainable packaging, food waste, animal welfare and naturalness emerge as critical sustainability topics for consumers

# 42%

Associate sustainability with sustainable packaging - more than any other sustainability attribute



# The Top 10 Sustainability Grocery Influencers

All Consumers 18-65 (Global); n=11,187

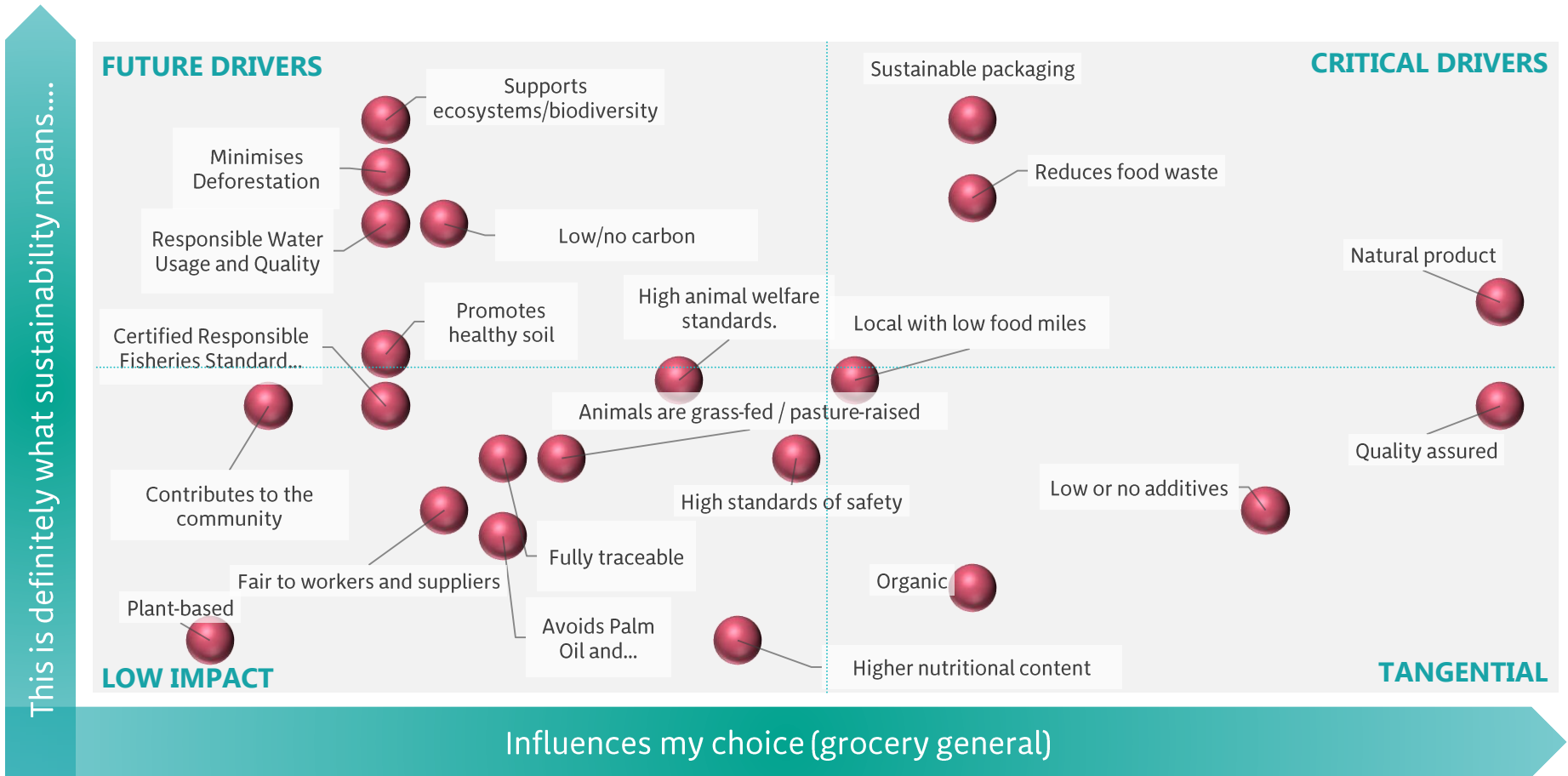
When it comes to choosing food & drink products in general, when you are shopping, which of these things impact on your choices, if any?



# The Critical Sustainability Drivers

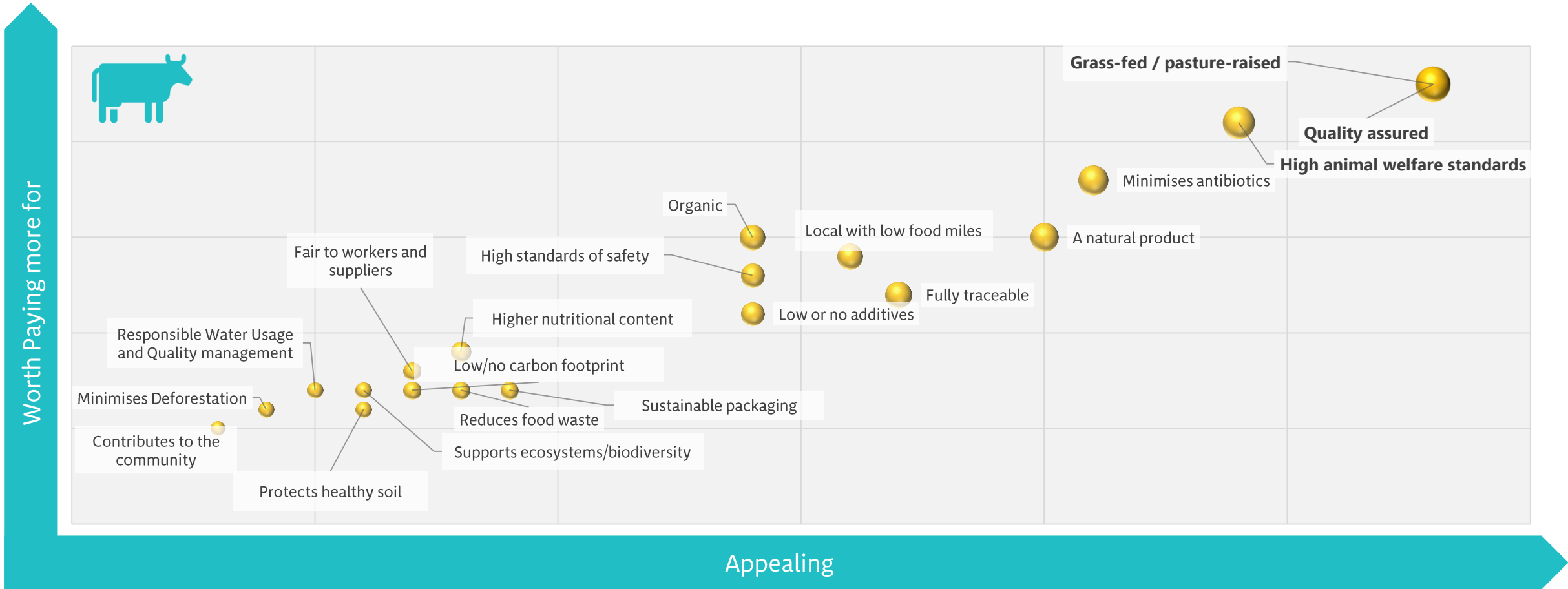
Those sustainability attributes that are both linked closely to sustainability and influences grocery choice are sustainable packaging, food waste, naturalness and quality assured. Communicating strongly in these spaces can be powerful with all consumers.

(Base: All Consumers 18-65, n=11,670)



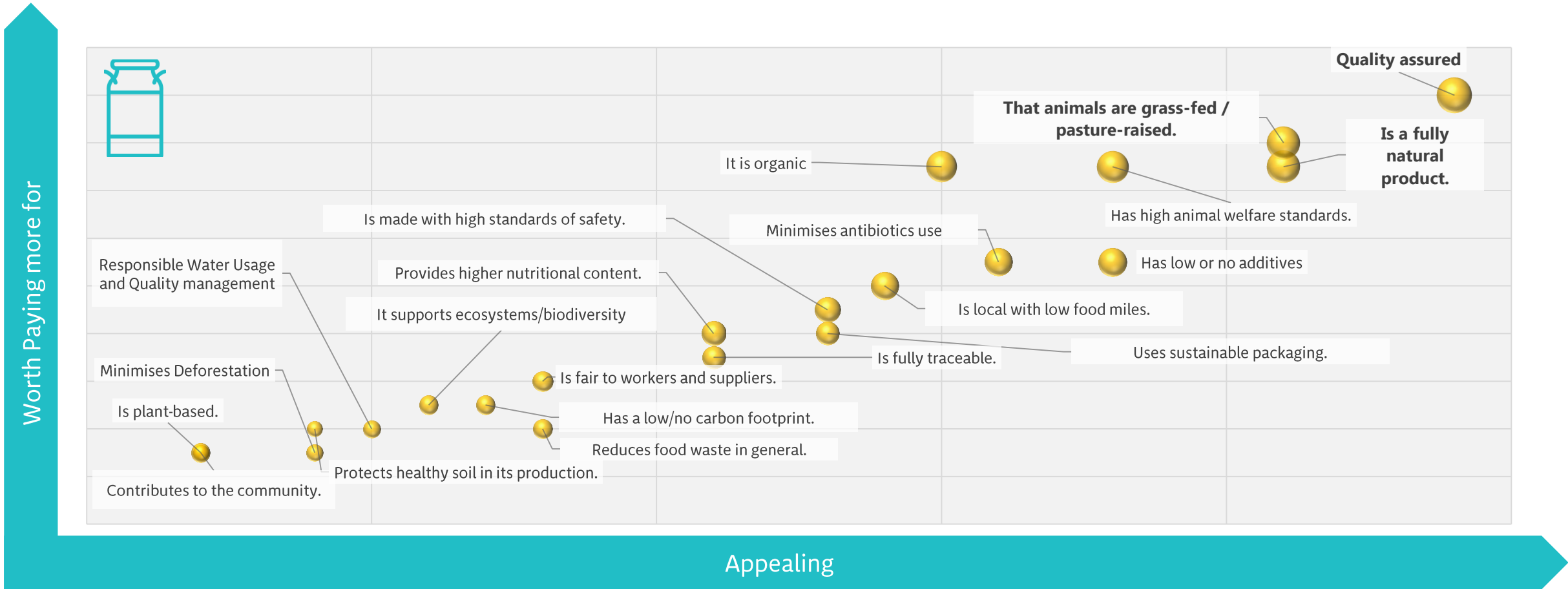


# Beef: Prioritisation (Global)



(Base: All Beef Consumers 18-65, n=6,070)

# Dairy: Prioritisation (Global)



(Base: All Dairy Consumers 18-65, n=5,060)



# Grass-Fed Stands Out



23%

Of beef consumers will pay a premium

19%

Of dairy consumers will pay a premium







# Packaging, waste and animal welfare are the key consumer topics to shout about

## Insight

Sustainable packaging, food waste, animal welfare and naturalness emerge as critical sustainability topics for consumers

## Implications

Get sustainable with your packaging - explore next wave solutions.

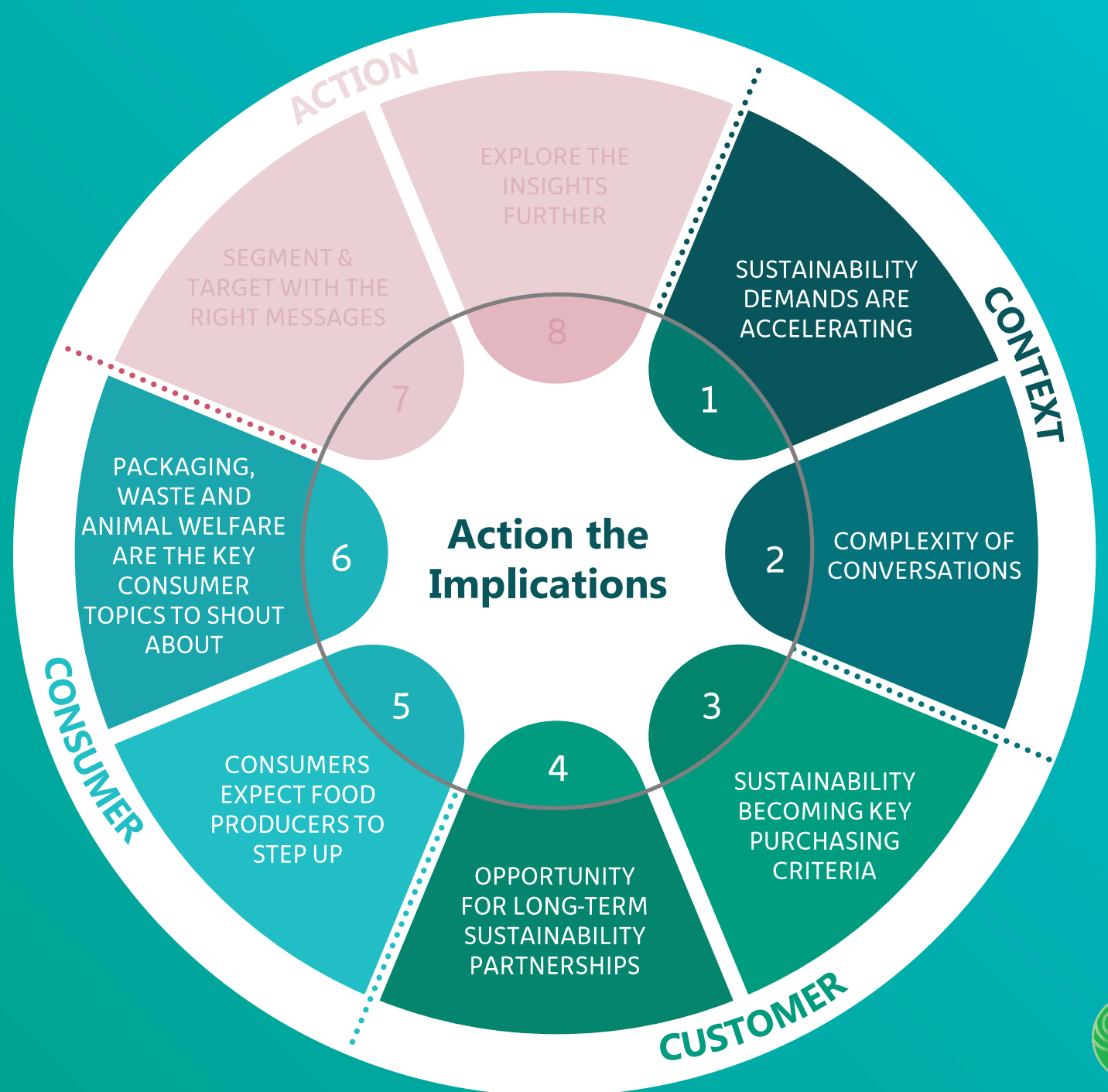
Brands that can support consumer efforts to reduce food waste have a real opportunity to stand out.

In beef and dairy grass-fed is a strong hand to play to drive preference for Irish.

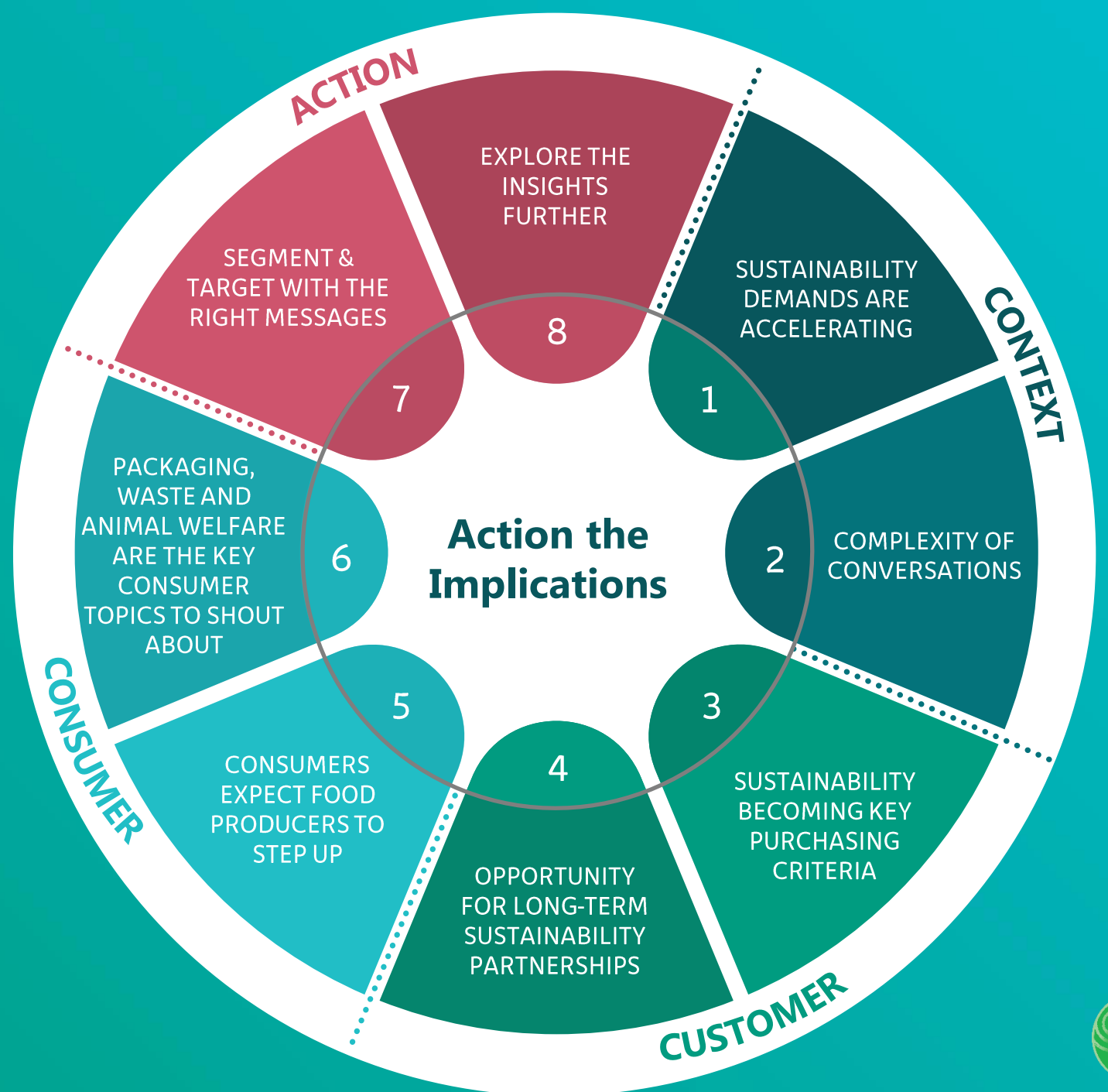




# Key Insights & Implications



# Action the implications





# Key Relationship Summary Implications



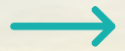
Starting from the key relationship audience perspective ...  
what are the relevant insights that need actioning



WHO : SUPPLIER / CUSTOMER



RELEVANT INSIGHTS /  
IMPLICATIONS



CURRENT DELIVERY

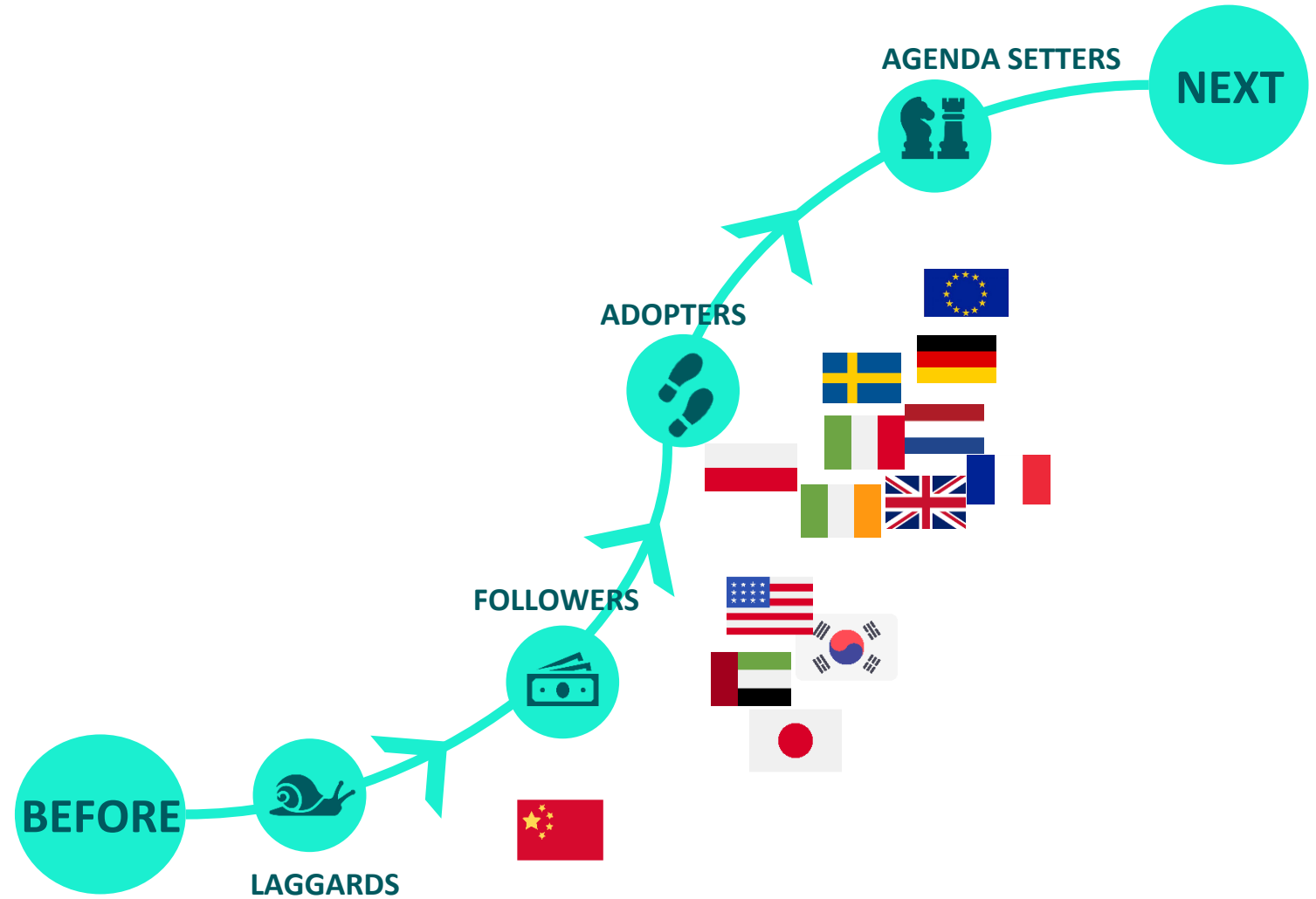


ACTION

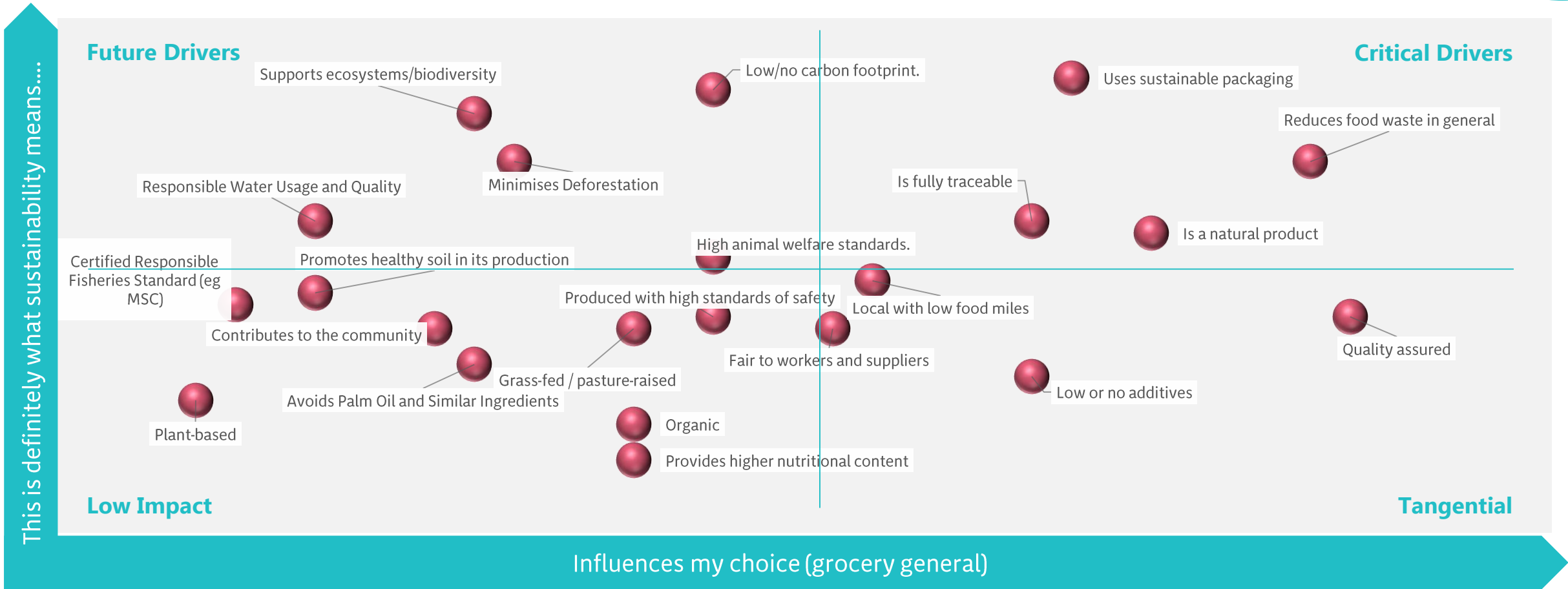
# Markets and regions are at different points

- Northern European markets are leaders
- Other EU markets have a focus on sustainability, but it is often through the lens of local and natural
- US mainstream consumers have not embraced sustainability to the same extent, but their more global F&D organisations have
- Markets like UAE are focused on sustainability but are constrained by practical realities in food supply
- Markets like China and, to a lesser degree, Japan are focused on more fundamental issues like safety and quality - but these markets are starting out on their journey.

TOPIC PLACEMENT IS REPRESENTATIVE BASED ON CONSUMER QUANT & CUSTOMER QUANT & DEPTHS



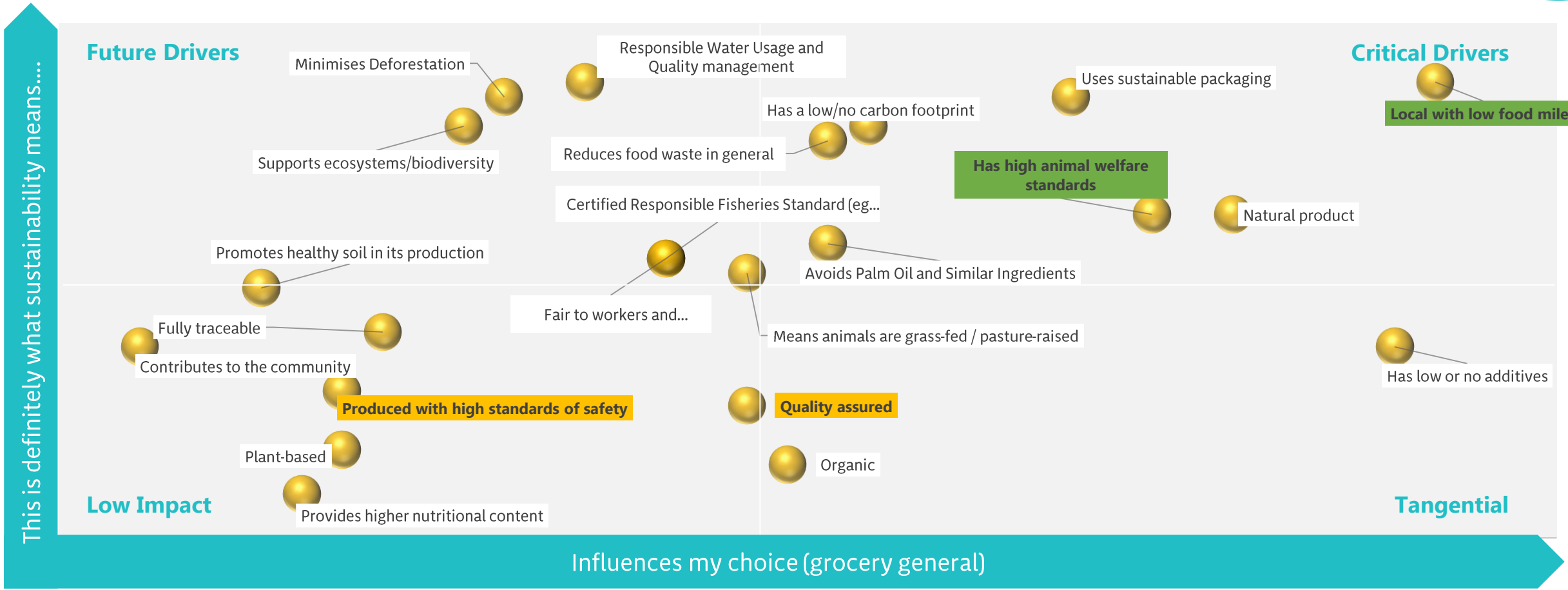
# Critical Sustainability Drivers in Ireland



(Base: All Irish Consumers 18-65, n=1,005)

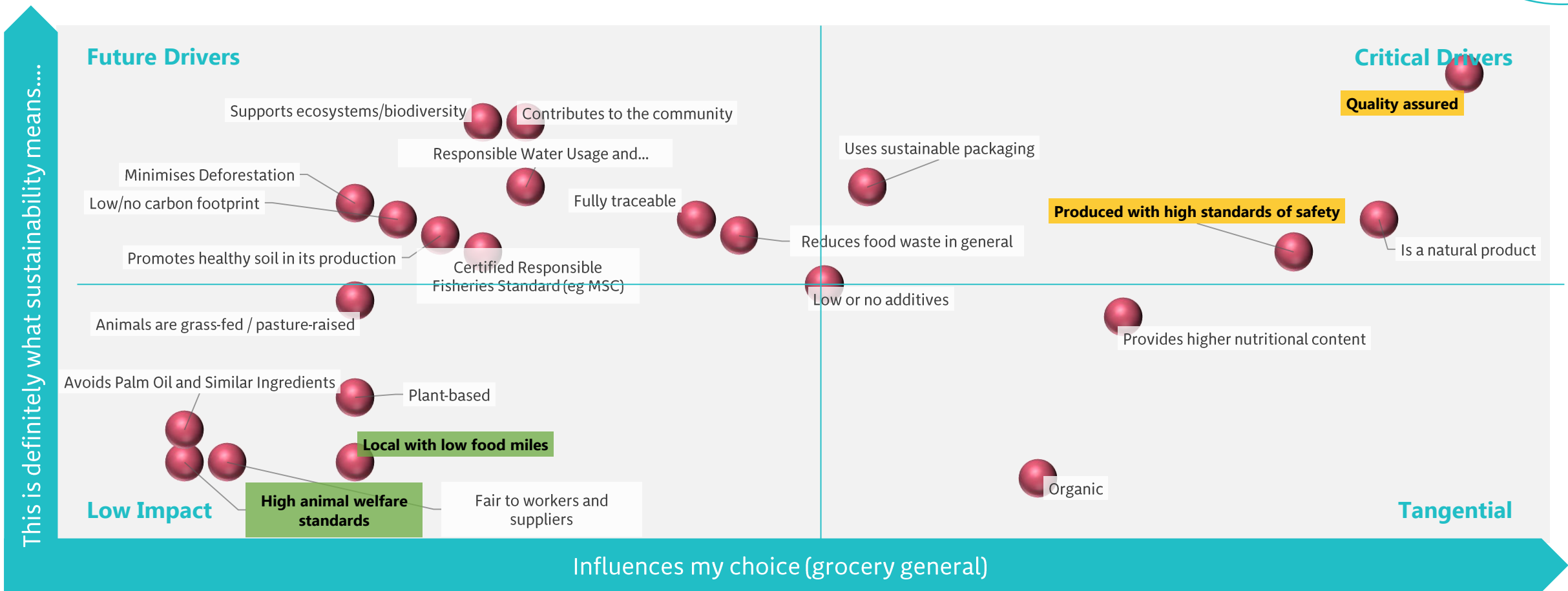


# Critical Sustainability Drivers in Germany



(All German Consumers 18-65, n=1,009)

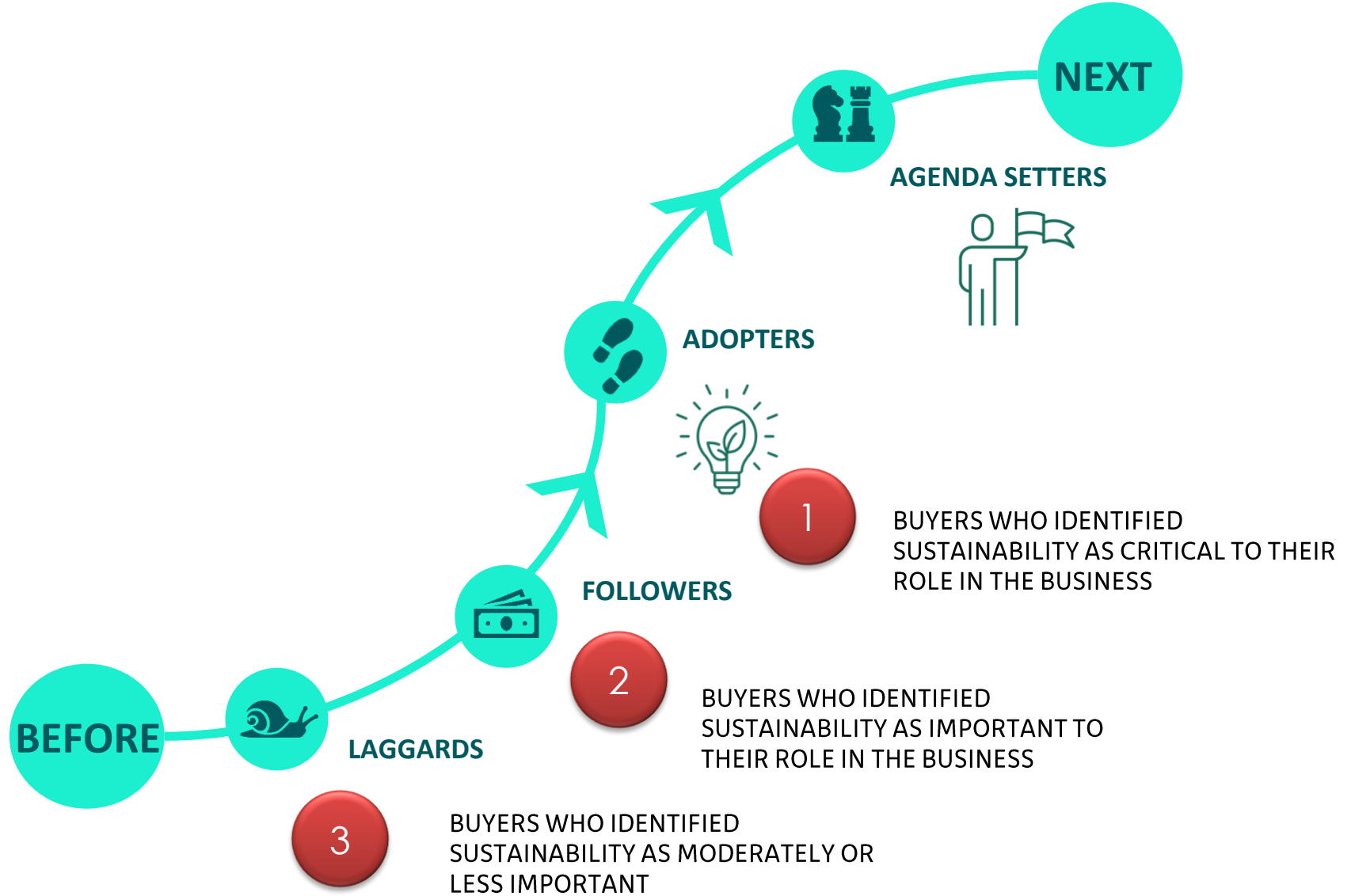
# Critical Sustainability Drivers in China



(All Chinese Consumers 18-65, n=1,011)

# We have identified three Buyer Personas

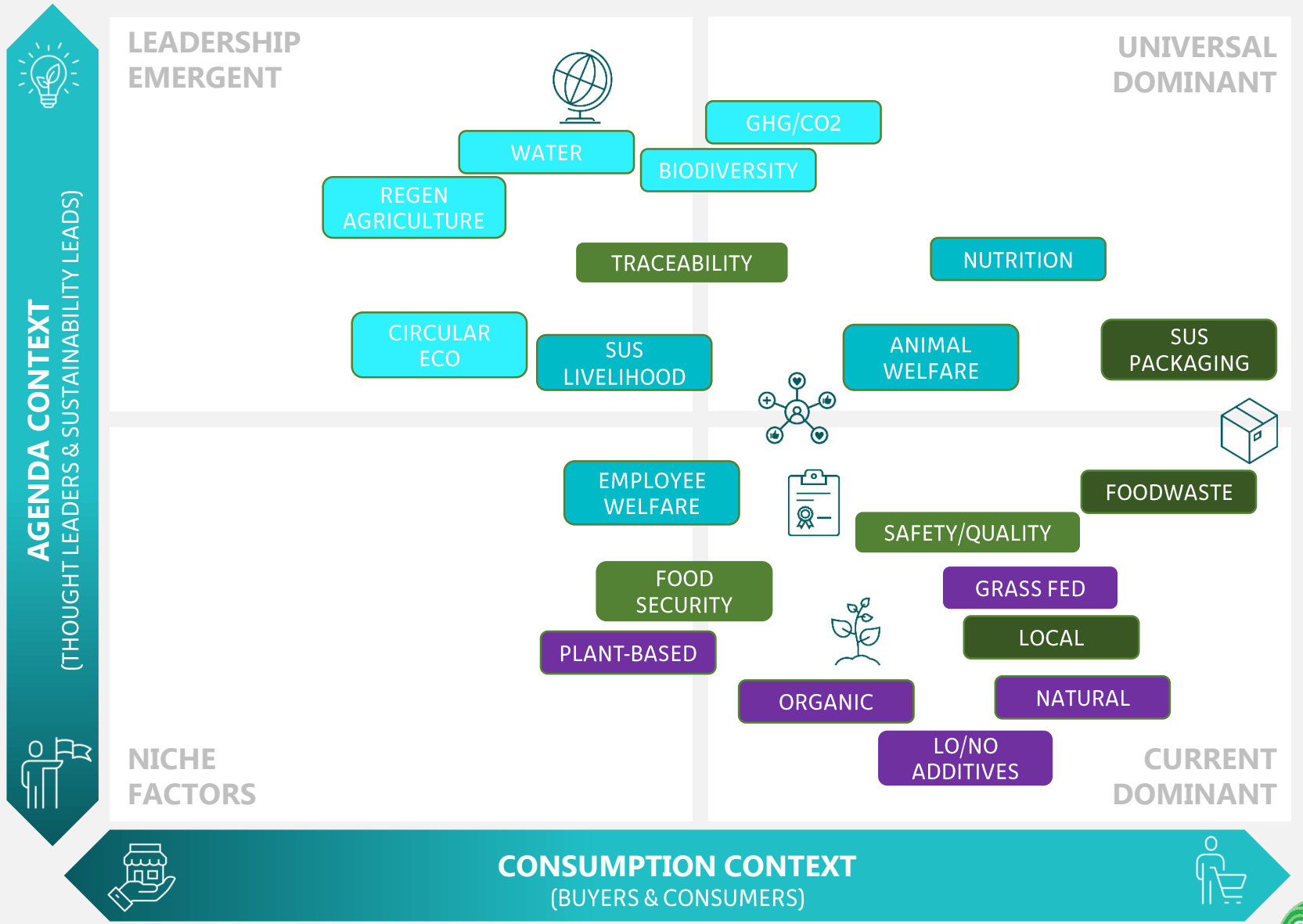
While buyers overall sit between Followers & Laggards compared to the sustainability leads or the Agenda Setters, we can see three clear sub segments of buyer personas, based on how important the buyers deem sustainability to be to their role





Critical to focus on the right topics for the right audience

TOPIC PLACEMENT IS REPRESENTATIVE BASED ON QUANT & DEPTHS

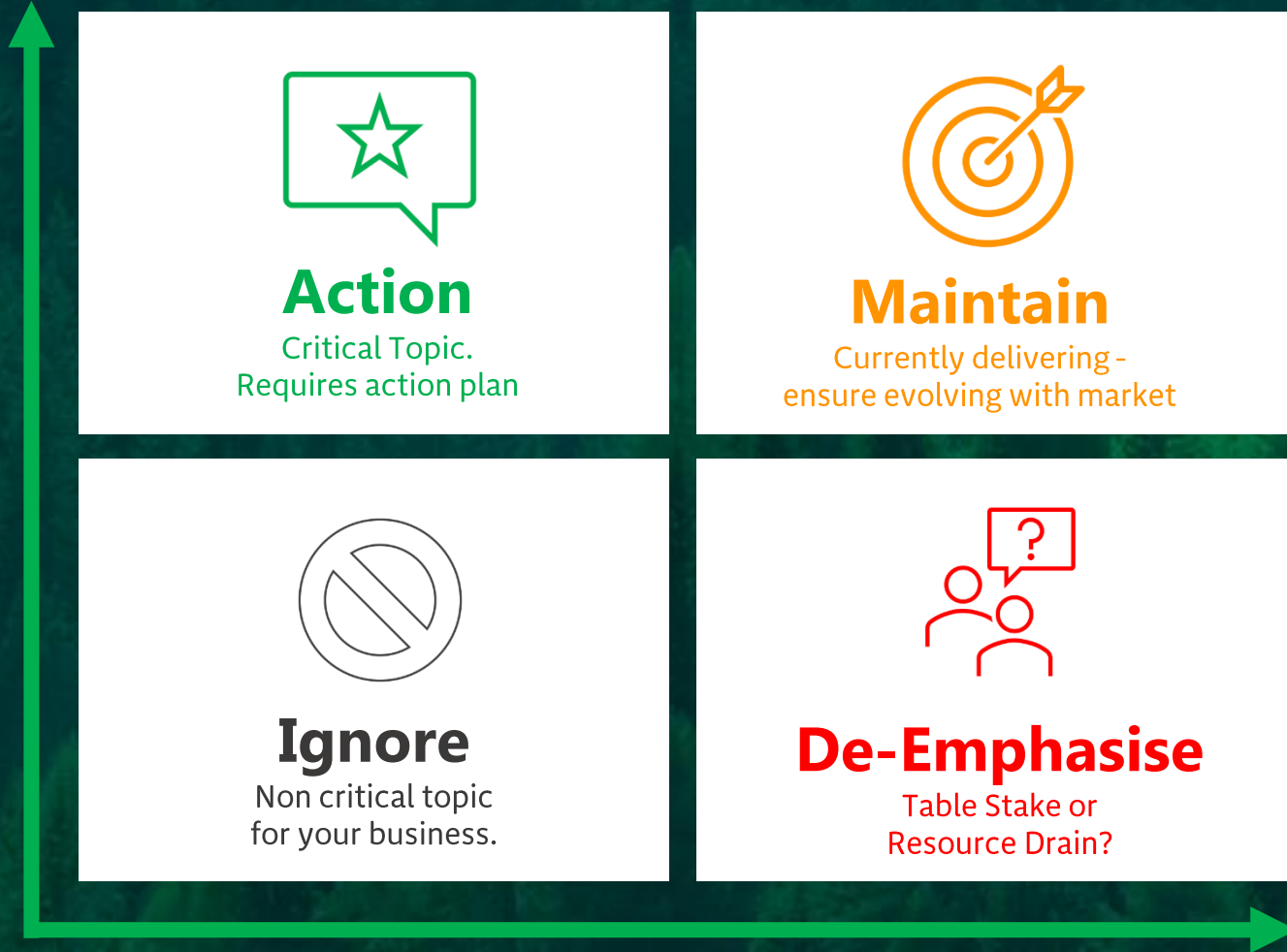




# Key Topic prioritization tool

Plot Key Topics against likely impact on your business and the current level of competency or focus

Impact on Business



Current Competency / Focus





**Thank you.**

BORD BIA   
**Thinking  
House**



# Image References

Slide 1 & 58 - Photo: © Sondem - AdobeStock\_305692033.jpeg

Slide 2 & 3 - Photo: © MBruxelle - AdobeStock\_169465415.jpeg

Slide 5, 49 & 56 - Photo: Shutterstock

Slide 6 - Photo: Pexels-lukas-590022

Slide 9 & 14 - Photo: Pexels-lukas

Slide 12 - Photo: © Agatha Brown\_Adobe Stock

Slide 13 - Photo by [George Evans](#) on [Unsplash](#)

Slide 16 & 20 - Photo by Etienne Boulanger on Unsplash

Slide 22 & 26 - Photo: carolien-van-oijen-unsplash

Slide 23 & 30 - Photo: Shutterstock By [Syda Productions](#)

Slide 24 - Photo: © Savo Ilic [#129669556](#)

Slide 25 & 44 - Bord Bia

Slide 28 & 31 - Photo: By [Budimir Jevtic](#) Shutterstock

Slide 32 - Photo: boxed-water-is-better-unsplash

Slide 34 & 37 - Photo by Viki Mohamad on Unsplash

Slide 35 & 36 - Photo: pexels-michael-burrows

Slide 39 & 46 - Photo by [Brett Zeck](#) on [Unsplash](#)

Slide 40 - Photo by Scott Warman on [Unsplash](#)