

Global Food Sustainability Outlook 2021

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BORD BIA 
**Thinking
House**



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

Key Topics of Food Sustainability: Materiality Assessment



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

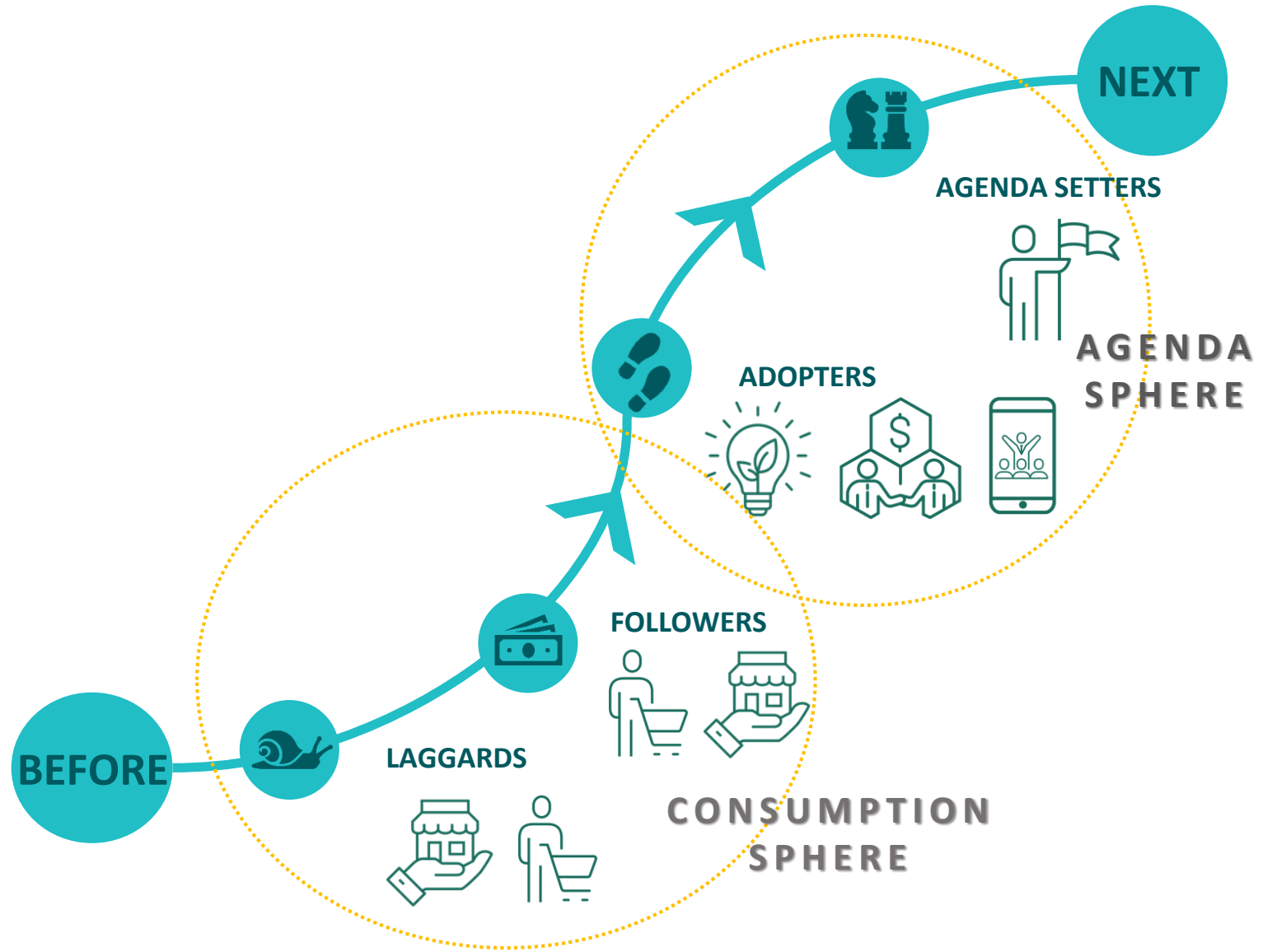


15. Animal health and welfare
16. Human health and nutrition
17. Food safety and quality
18. Product labelling and traceability
19. Alternative protein
20. Human and labour rights



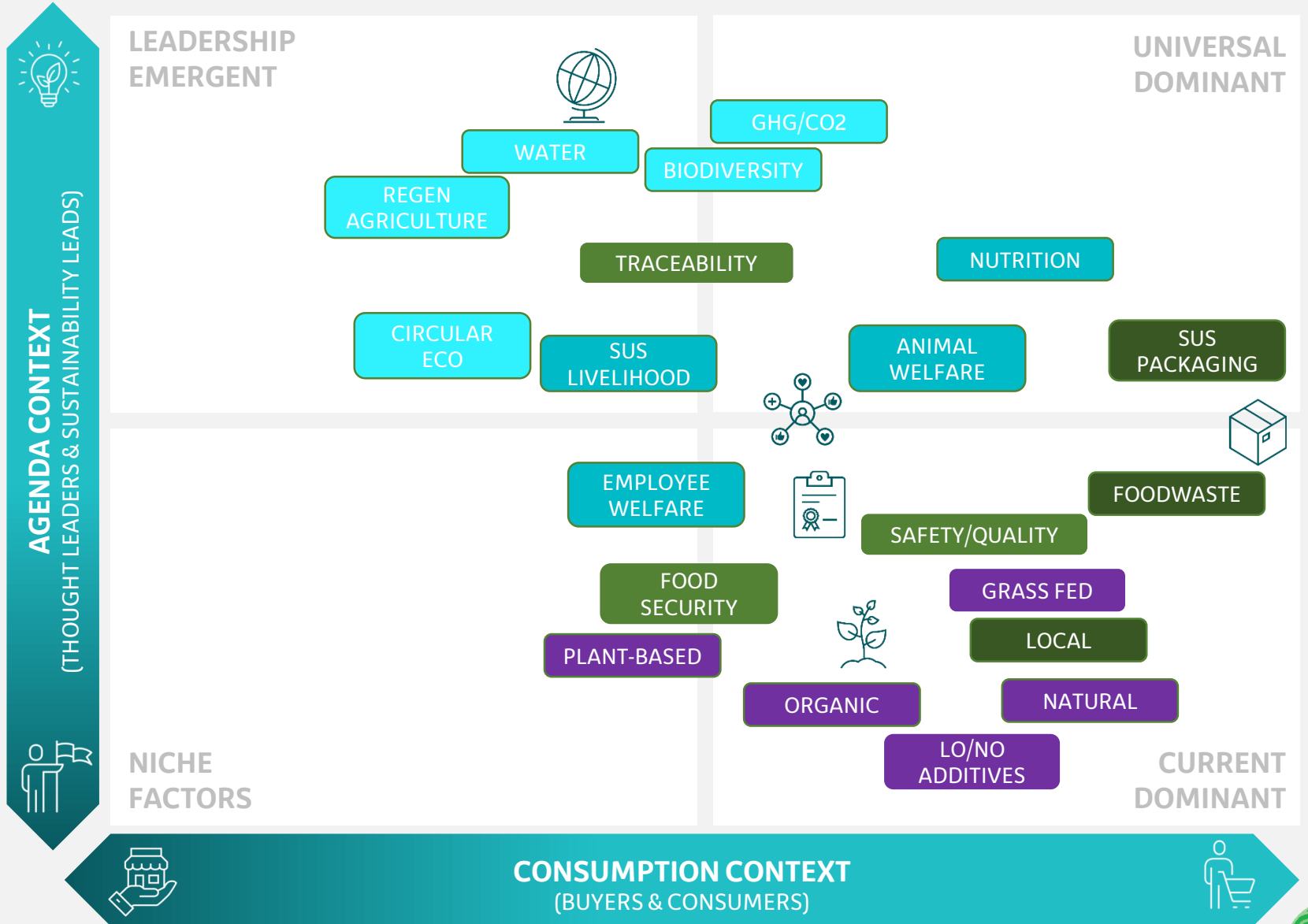
21. Food security
22. Digital technology
23. Sustainable livelihoods and a 'just transition'
24. Market opportunity
25. Skills and training

There are two clear “spheres in the sustainability conversation”

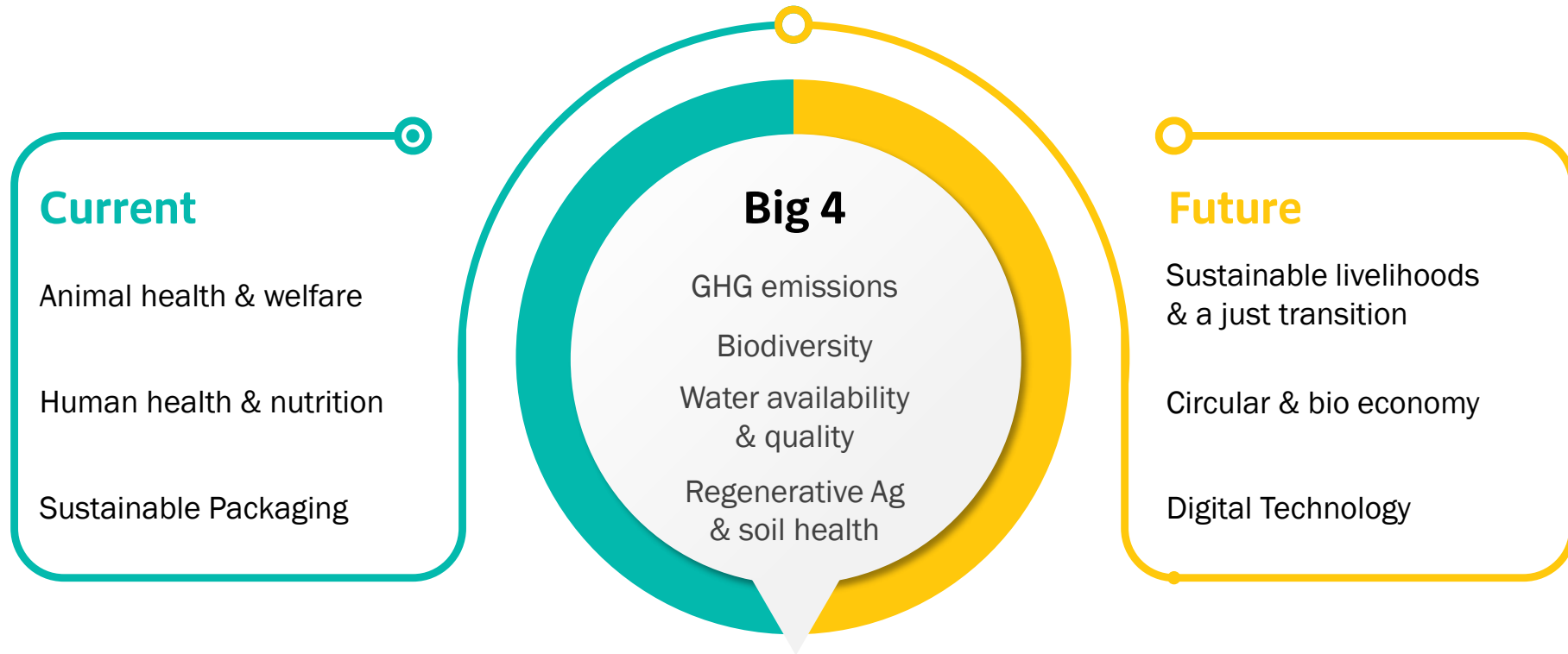


Critical to focus on the right topics for the right audience

TOPIC PLACEMENT IS REPRESENTATIVE BASED ON QUANT & DEPTHS



Agenda Setter Perspective



There are 4 key issues that are top of the agenda today and will continue to be top in 5 - 10 years time.

These 'Big 4' are at the heart of a sustainable food system.

The sustainability agenda is accelerating quickly..

Insight

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

43%

Say sustainable production of food and drink is very important or essential when grocery shopping - but still behind taste, health and origin.

75%

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



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

65%

Say they have made some effort to buy food with **higher animal welfare standards** in the last 12 months



61%

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

73%

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

72%

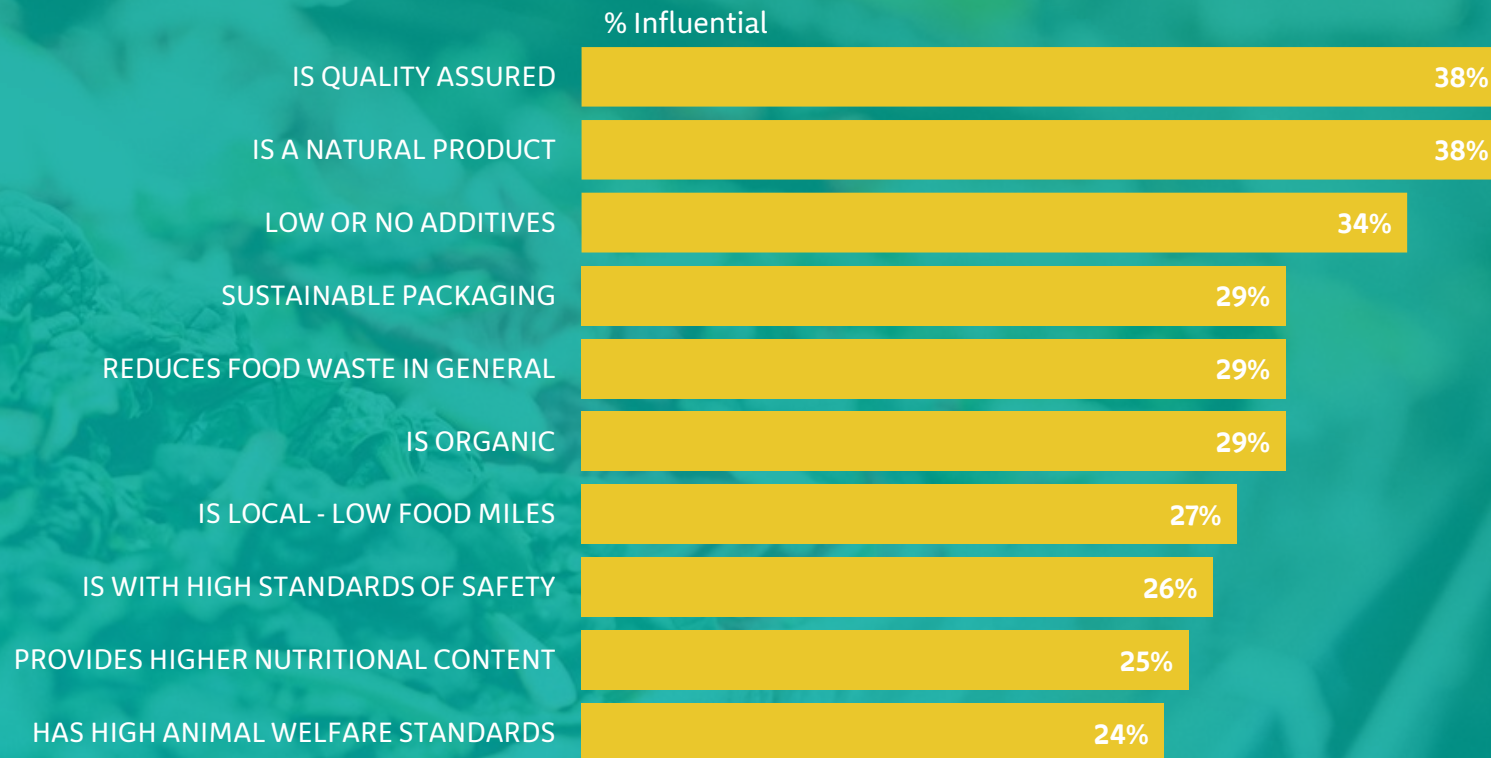
Say they'd like to buy more sustainably-produced food but it is too expensive



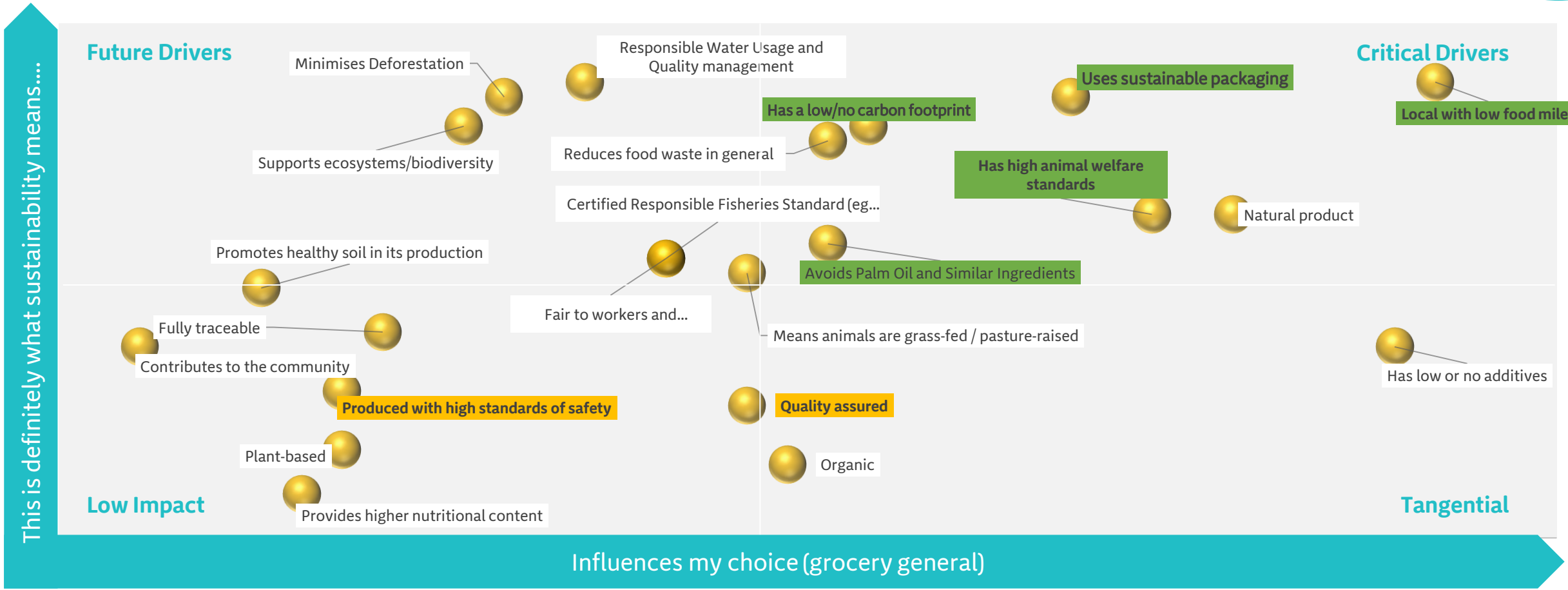
The Top 10 Sustainability Grocery Influencers

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?

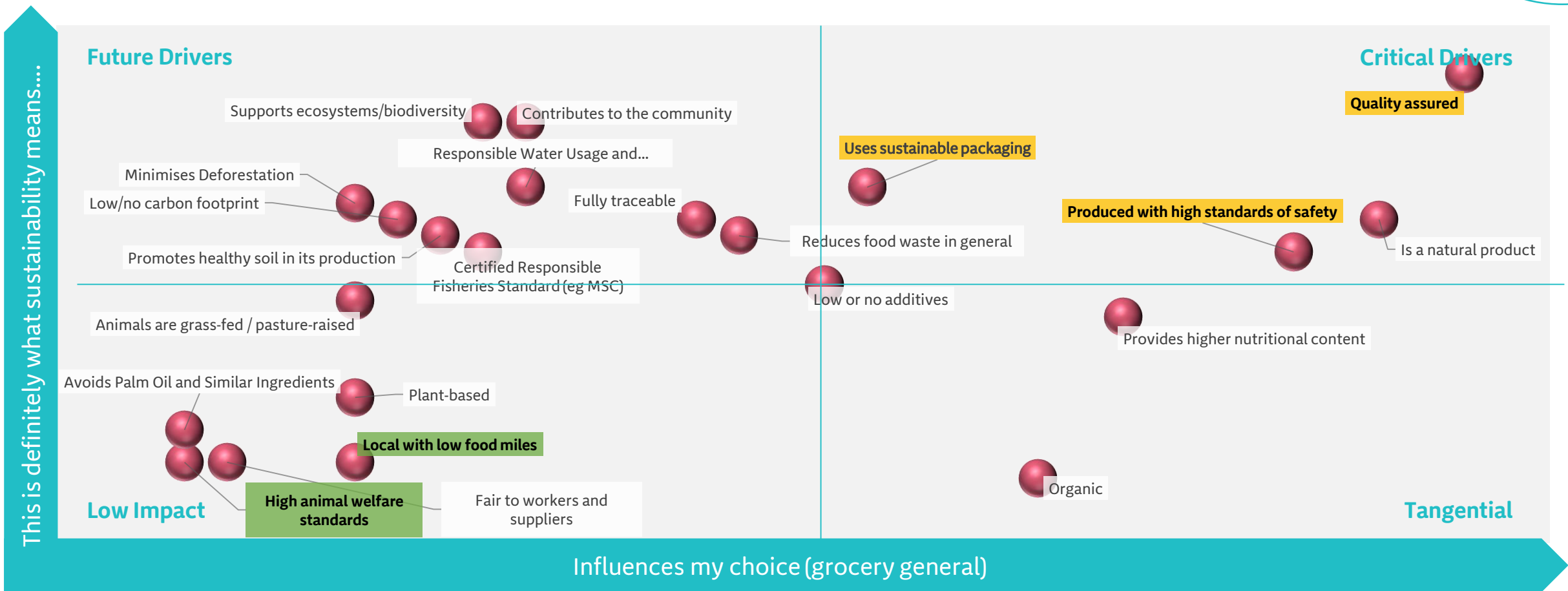


Critical Sustainability Drivers in Germany



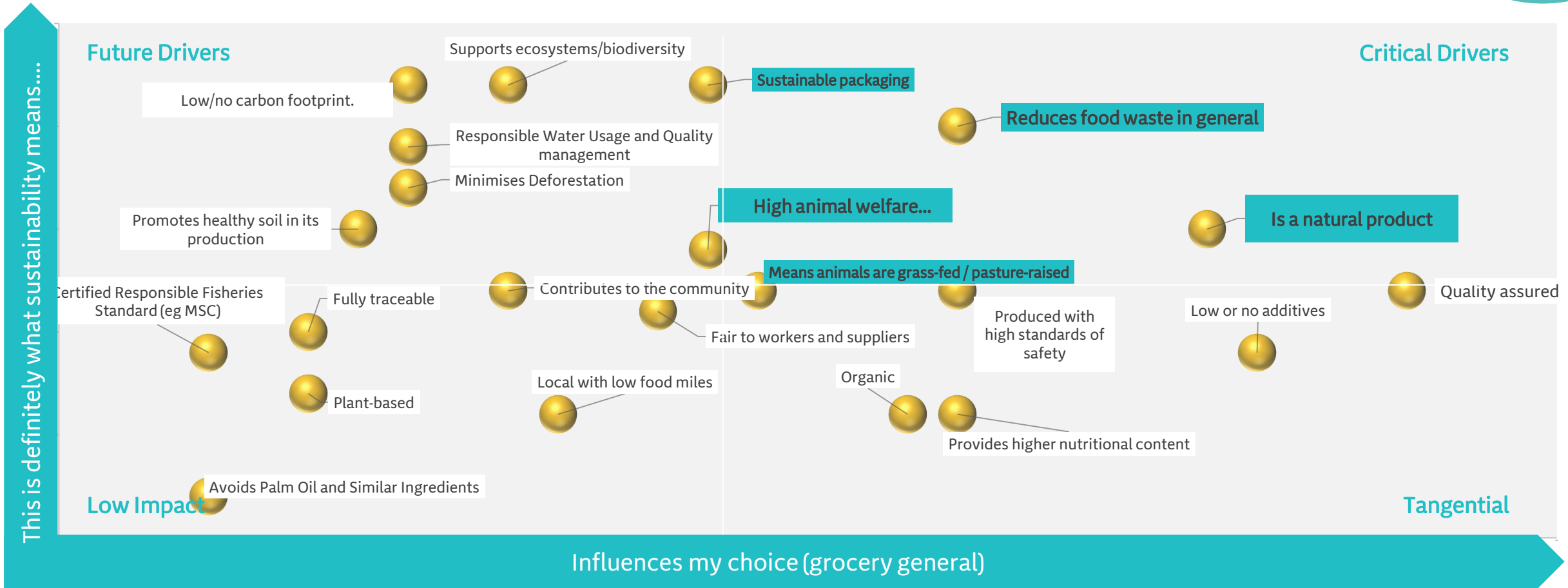
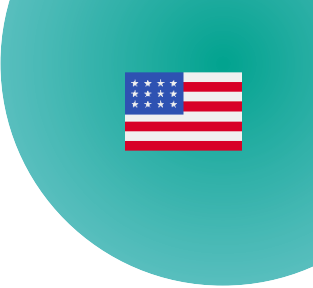
(All German Consumers 18-65, n=1,009)

Critical Sustainability Drivers in China



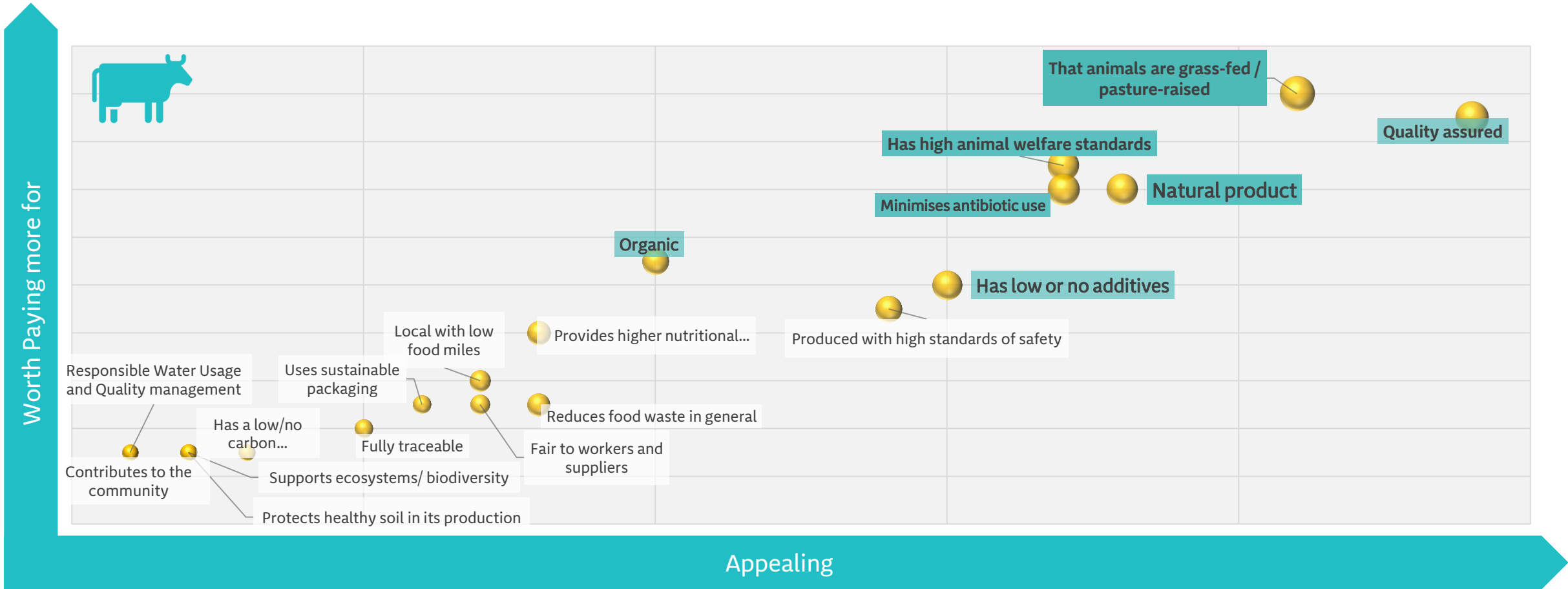
(All Chinese Consumers 18-65, n=1,011)

Critical Sustainability Drivers in USA



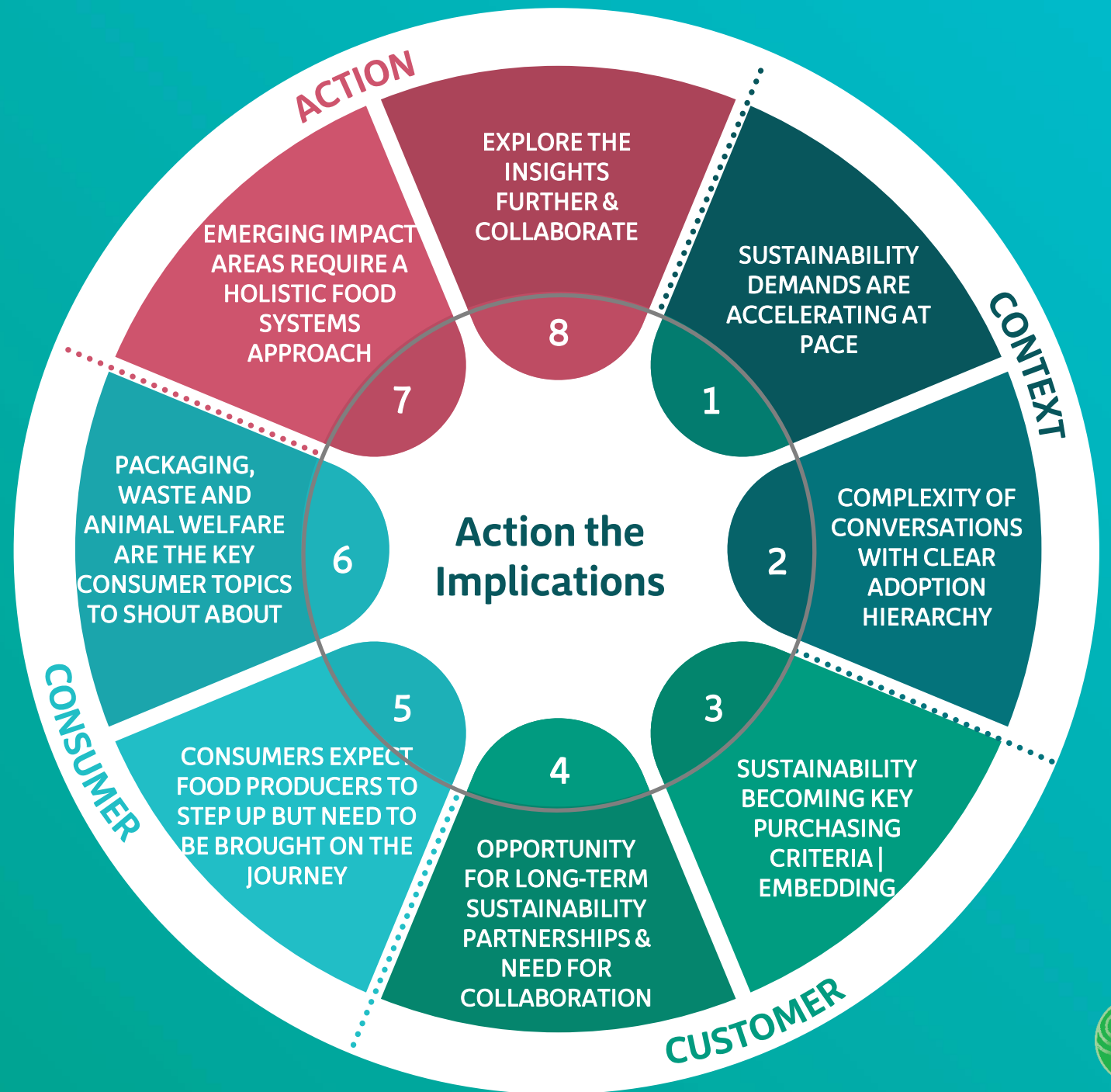
(All American Consumers 18-65, n=1,011)

Beef: Prioritisation (USA)



(Base: All US Beef Consumers 18-65, n=507)

Key Take-Aways...



Collaboration & Partnership

Domestic



Global



Origin Green Ambassador Programme

- Ten professionals
- MSc in Business Sustainability
- 4-5 years commercial experience
- Run in conjunction with UCD Smurfit School, Harvard Business School, MIT & NYU Stern
- Three 6- month industry placements with leading global food organisations



UCD Michael Smurfit
Graduate Business School



HARVARD
BUSINESS SCHOOL



NYU | STERN

Walmart*

TESCO

Nestlé



DANONE

Coca-Cola

Mars



sodexo

Cargill

Alibaba
JAPAN
Global trade starts here.

BARRY CALLEBAUT



PEPSICO



ZNU
Zentrum für Nachhaltige
Unternehmensführung
Universität Witten/Herdecke

Bidvest
Foodservice

Thank you!

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