

Post Event Summary



FUTURE FOOD SYSTEMS

2 FEBRUARY 2023 | LONDON

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Delivering Sustainable Nutrition at Scale



Future Food Systems 2023

Delivering sustainable nutrition at scale requires a transformation mindset across all actors within the food system. Taking marginal steps towards a less damaging environmental and social future is simply not enough.

That was the key message from the 2023 Future Food Systems conference in London, where senior figures from across the global food and beverage supply chain met to explore ways the industry can harness innovative thinking, technology, and financial incentives to develop a better production model.

Sustainable business expert Mike Barry, chairing the event, kicked off the day with a powerful message highlighting the nightmare scenario of a potential 3°C increase in global temperatures: “Business has just not stepped up enough,” he said. “The food system is at the heart of the burning world, as we cause 33% of all greenhouse gas emissions. But no sector is more vulnerable to the problem, the extreme weather events, it is creating, and we have to put this right.” And of course, we can talk about obesity, inequality, deforestation, and biodiversity loss too – the charge sheet is rotten.



The opportunity

Food businesses are uniquely placed to leverage their influence to accelerate the adoption of regenerative practices, ignite the potential of farmers and engage citizens. What's more, the right financial mechanisms have the potential to drive behaviour change at scale.

The complexity of the system requires scalable innovation and collaboration. Up for the challenge, Neil McGowan, senior director of global regulatory and wellbeing at Kellogg Company, shared: "Six years ago we realised that a better food system is the innovation opportunity that we are all facing."

Alexandra Kaspareck, sustainability lead at CSM Ingredients, reinforced this sentiment quoting CSMI CEO: "The sustainable

evolution of ingredients will be shaped by bold innovators, purpose driven companies and inspired teams."

McGowan also shared how this perspective has influenced Kellogg's operations: "We changed how we started to think about how we design our food, and the people who will make real change in food companies of our size are the R&D organisation."

The role of standards

The day began with a group discussion led by Richard Werran, director of food & retail supply chain at BSI who provided examples about how internationally accepted ISO standards enable organisations of all sizes to simultaneously scale their operations and support UN Sustainable Development Goals in their journey towards sustainable nutrition. "It's important to remember this is more than just being able to make a claim about a UNSDG, it's about doing the right thing", he added.

Further emphasising the importance of standards and the role they could play, Henry Unwin, director of sustainability at Daylesford Organic, remarked: "Regenerative is going through the roof. The fact that there's no standards or definition means it can exponentially grow because nobody is really saying what it is."

A regenerative approach



Farmers were cited throughout the event as having a central role to play in a brighter future, with John Steel, chief executive of Cafédirect, saying that engaging farmers and working together – “joined at the hip” – represents the pathway to meaningful change.

Expanding on the theme, Giulia Stellari, director at Fall Line Capital, described soil as “a living matrix” and landowners as having a greater role in sustainable food production than has previously been acknowledged, given that as much as half of US and EU farmland is rented.

“Landowners are an overlooked potential co-investor who can help unlock investment in the soil,” she said. Stellari’s firm Fall Line Capital invests in farmland and works with farmer tenants to design sustainable production models for each farm that intensify crop rotations, diversify incomes, and conserve soil.

Dr Emma Keller, head of sustainability at Nestlé UK&I, stressed the positives of talking about regenerative agriculture rather than simply sustainability, backing up the view that soil health is critical.

“Sustaining a broken food system is not good enough – we need to be putting more back into our food system than we take out, we need to regenerate it,” she explained.

“And while regenerative agriculture is fundamental to this, it’s not just this alone – it’s about regenerating our health and the health of communities. How do we put life and health back into people, into the planet and into communities? We’ve got to be farmer-centric in our approach. We cannot tell our farmers what to do – we have to listen, understand and evidence the benefits of the transition to drive widescale change.”

Engaging consumers

If engaging farmers must be a central part of the story going forward, consumers are equally important. Dr Stella Peace, chief R&D and quality officer at Nomad Foods, said consumers must also be “front of mind” and that while sustainable practices must become the norm in food production, the products still have to taste great.

In addition to delivering great products, authenticity and leading from the front will be critical in terms of engaging citizens and driving sustainable behaviour change.



Rees Bramwell, head of nutrition and sustainability at Compass Group UK&I (Eurest) stressed the importance of focussing inward first. “We can help consumers make better choices by giving them better choices. I’m a big believer that consumer demand is there. I think the businesses that change their own behaviour will probably create the most behaviour change among customers and consumers. Rather than just throwing more and more information at them, we’ve got

to take control ourselves and put them in the right environment for it.”

Kaspareck added to this point: “There’s a lot of want and need for consumers to take ownership, to be sustainable and to buy sustainable products, so we need to be able to give this transparency and level of understanding to the customers. It’s about bringing the knowledge to them in a uniform and collective way.”

“We can help consumers make better choices by giving them better choices.”

Jessica Vara, head of brand & innovation at BÖL Foods, stressed the importance of striking the right tone at the right time. “Following Brexit, the pandemic and the cost-of-living crisis, people’s priorities are constantly shifting so it is important to stay close to your consumers’ attitudes and beliefs to ensure that your products are making their life better before you put the ownership onto them to help save the planet through different choices when it comes to food. Help your consumers to

understand the nuanced ways into plant-based eating that isn’t going to turn them off from your brand.”

There are some inventive ways of engaging the public. Speakers also explored the role of personalisation and gamification to drive healthier purchasing decisions. One example of a fruit and veg challenge sought to expand shoppers’ horizons and dramatically boosted sales in this category.

Dorothy Shaver, global food sustainability director at Unilever, believes businesses have a major part to play in enabling better choices for both people and the planet. "There's a big role for us in getting better products on the shelf," she said. "It's hard to change behaviours, and when we can make a big change, like growing our foods more sustainably and regeneratively or changing out some of the ingredients, and still have the same product that people love, then we are enabling a better choice."

Meanwhile Josh Bayly, sustainability director at PepsiCo Europe, outlined the PepsiCo Positive end-to-end transformation, which is about how the business serves consumers and remains profitable a decade down the line with sustainability and human capital at the heart.

But while the number of consumers who are passionate about environmental purchasing is growing, Bayly noted that it's still not enough: "We are consumer obsessed," he admitted. "But it is vital not to expect consumer empowerment and consumer responsibility to be the only lever of change. Great brands have such good reach and trust from consumers that we can also deliver rapid improvements without requiring huge behaviour change. And this is also our responsibility."

Data and investment

The conference sought to examine what role investors could play in the evolving landscape, and a variety of experts expressed the view that there are more opportunities to unlock the potential of the financial sector. David Macdonald, founder of ethical pensions and investment business The Path, said consumers have the power to choose to invest in "the good guys", which is to say companies with ethics at the heart of their business. By doing so, he said, it would force "dinosaur companies" that were not moving with the times to update their practices to survive.

Jo Raven, director of thematic research and corporate innovation at FAIRR Initiative, added that the food sector must look at engaging the capital markets and educate, influence, and ensure they are supporting more sustainable businesses.

The conference observed that global climate finance is gaining fast at 12% per year but noted that much of this is being directed towards the energy sector rather than food, because that is seen as "more secure and bankable".

It also explored the role that food businesses can play to reshape the narrative through a three-phase roadmap: Build, a phase that includes digitising emissions management, focusing on quick-win interventions and partnering with credible suppliers; Refine, which includes deploying a transformation mindset; and Sustain, which centres on the use of 'procurement-grade' data and deploying capital through partners.



Certainly, quality data has a fundamental role to play. Several speakers shared that their businesses were investing in technology to engage suppliers in a more productive way.

A specific example which aims to collect primary data is expected to go live on a first-wave rollout in June. This project will be launched in parallel with a supplier-facing sustainability and innovation system for a whole-system approach.

Shortening supply chains

Start-ups and smaller businesses also have an important role to play in transforming the food system. Irina Turcan, co-founder of plant-based food brand Erbology, demonstrated how newcomers can

operate a successful, streamlined, direct-to-consumer model. Erbology looks for every opportunity to engage with and educate consumers about its products and ethos.

Erbology is primarily B2C and seeing strong growth. “We love creating a unique experience for our customers. You can build your brand and trust online. If you offer quality, are transparent with your customers and your communication is clear they will become loyal to your brand,” explained Turcan.

For Emilie Vanpoperinghe, co-founder and chief executive at Oddbox, having a nimble supply chain involves being flexible over which products the company sources for its surplus fruit and veg boxes. The company does not have contracts with the 600 farms it works with, but instead limits food waste by taking what those suppliers have left over. That, of course, requires a communication job with customers to ensure there is no disappointment: “We work in a very flexible manner, and if there’s no surplus then we reach out to other suppliers,” she said.

“It’s a direct-to-consumer model so we can speak to our community and get them to understand what is seasonal so they see it might not be as varied as shopping with a retailer.” Oddbox’s model demonstrates a paradigm shift in terms of reframing consumer expectations around seasonality.

In addition to brands challenging the status quo, shortening supply chains, and reducing food waste, vertical farms also have an important role to play.



Harvest London founder and chief executive Chris Davies noted that we have created a demand-driven food system, in which farmers grow as much as possible and a sobering 40% of food is lost. Instead, he said, we need to create a supply-driven food system whereby only the amount of food required is produced. Vertical farms, with their precision-growing approach, are well placed to lead that process.

Collaboration and streamlining the supply chain should not be seen as simply the domain of SMEs though. Keller outlined how Nestlé sources from a staggering six hundred thousand farmers globally and is taking great strides to get closer to them by working with a vast network of agronomists in over 40 countries and by developing an 'agripreneurship' programme designed to educate the future farmers of tomorrow.

"We need to create a supply-driven food system whereby only the amount of food required is produced."

"Farmers in the UK are an average 60 years old, so we are working to support the next generation of farmers, working with them on regenerative practices, future technology that will play an increased role, and helping to establish more farmer peer-to-peer learning and exchange opportunities," she said.

And this new approach doesn't just go up and down the supply chain but morphs out to encompass a much wider range of relevant parties: "We have to do this collaboratively and collectively and we need to do it at landscape level," Keller said.

"We cannot just go farm by farm - many of the challenges we are facing go beyond the border of a single farm. We really need to work at landscape level and work collaboratively with a range of stakeholders: the water companies, the county councils, the recreation companies, and anyone else with an interest in that land. Let's work together to put the practices in place to deliver the outcomes we all need."

The protein debate



How far will technology push future food production? Peace said studies showed that some consumers are looking for products that replicate meat, while Waitrose & Partners' executive chef Martyn Lee believes new tech such as artificial intelligence (AI) will take on increasing significance.

That, though, comes with caveats: "We are in this uncanny valley with AI, where the technology is getting very close to being at a point where you can't tell the difference between meat and non-meat," he explained. "But a lot of the faux proteins still look like a pre-cooked piece of meat. I like to have that emotive link between cooking, preparation and consuming, and I do think that gets lost. We all have an emotive connection with food, and that can very quickly get lost within these technology-based arguments."

Maija Itkonen, co-founder and chief executive of Onego Bio, a pioneering biotech company that has created an animal-free egg white, highlighted the need to take a balanced approach to technology. "We should not fall in love with something that's happening only in the lab because that doesn't necessarily scale. There are already technologies out there that can be put to new use - it's also about learning from the past and not just building new technologies."

"Food consumption trends continue to evolve, and the industry needs to stay on the ball. Paul Brown, founder and chief executive of BÖL Foods, said he had predicted the backlash against "dirty veganism", but also stressed that the current consumer obsession with protein means that important fibre is being overlooked in diets. His take was echoed by Lee, who said there is an overreliance upon protein."

Peace and Lee suggested the likes of beans and pulses, quinoa, legumes and mushrooms could all play a much more prominent role in diets going forward.

One thing that is clear is that the whole supply chain needs to be part of the pathway to sustainable protein, particularly considering the environmental impact of soya within animal feed. To that end Dr Adrian Charlton, principal scientist at Fera Science, pointed to his organisation's work on trialling insects within feed as an example of innovation that can have a positive impact. Last summer Fera opened a £1 million laboratory for insect bioconversion at its York Biotech Campus.



Other key themes discussed throughout the day included how to counter biodiversity loss and improve packaging, key elements of a holistic sustainability strategy.

Mark Varney, head of Fair to Nature at the RSPB, said that companies need to look after the environment “not just because nature is beautiful, but because it is crucial; without nature there is no food”.

On packaging a speaker noted that nearly a third of their company’s overall footprint is in packaging, but while the conversation tends to focus on plastic pollution and recycling, there’s been relatively little done in terms of transforming the carbon footprint of packaging. They remarked “It’s about how we bring different players and parts of the industry together to transform at a systemic level the way we manage packaging. Collaboration is crucial.”

Looking ahead

Future Food Systems left attendees in little doubt that doing nothing is not an option for either business success or the health of consumers and the planet. But taking small steps is equally ineffective – as Barry pointed out, incrementally reducing energy or plastic use by a couple of percent a year is simply not fit for purpose in the current world. “You need to engage your teams to think differently in future,” he told the audience. We need a transformative mindset that recognises the imperative for a root and branch renewal of the food sector from field to fork.

Thinking differently comes in many forms, as the conference heard throughout the day, and radically changing such a complex system requires more than a single solution. Transformation involves a shift in thinking away from maintaining the land we have to regenerating it; from talking at the consumer to conversing with them. It means adopting more imaginative approaches to sourcing, retailing, and financing the industry, with ethics and good practice at its core.

What lies ahead is, on the one hand, a daunting proposition. But as so many of the speakers illustrated, it’s also exciting and filled with possibilities. Creating an improved food system is not altruism, it’s good business sense, and the best companies will invest, create, share and inspire as they lead us into a better, healthier future.



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Altruistiq is a GHG emissions data management platform that enables businesses to make better sustainability decisions. Consumer businesses like Gousto, Lush Cosmetics, and Octopus Energy use Altruistiq to build actionable emissions reduction plans supported by accurate, granular emissions measurement and tracking.

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Varda is an ag tech start up developing software solutions for agriculture, founded by Yara International, a world leader in crop nutrition. Varda's mission is to enable the use of field-level data to accelerate the transition towards a nature-positive food system by tackling the challenge of data fragmentation and lack of standards of data produced on farms every day.

Varda operates a digital platform, Global Field ID, that through the ingestion of field boundaries assigns a unique identifier that allows for the identification of fields, globally. Having a common geospatial reference for fields will enable industry stakeholders to 'speak the same language', improving the interoperability of digital farming tools and data exchange across the whole food value chain.

Through the widespread adoption of Global Field ID, our goal is to bring together leaders from the agri-food industry to collaborate to transition to a more sustainable, resilient, and transparent food system.

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The FAIRR Initiative is a collaborative investor network that raises awareness of the ESG risks and opportunities in the global food sector. Our mission is to build a global network of investors who are aware of the issues linked to intensive animal production and seek to minimise the risks within the broader food system. With over 350 members globally, we are the world's fastest-growing ESG network, representing over \$70 trillion in combined assets. We engage in proactive dialogues with investors, companies and stakeholders to address the most material issues linked to intensive animal farming. We also help investors identify and prioritise these factors through cutting-edge research, which can be integrated into their stewardship and decision-making processes.



With 1.2 million members, the RSPB is the UK's largest nature conservation charity. The RSPB's Fair to Nature farm and food certification scheme helps the charity realise its aim to reverse the decline in farmland biodiversity in the UK and supports brands to engage their customers in nature-friendly food production.



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