

# Food Fw: Insights 2016-17



# Making food supply sustainable



*Home delivery services. 'Ugly vegetables'. Organic baby food. Over the last two years, the demand for innovation and sustainability in the food and beverage industry has created huge opportunities.*

*Food Fw has been set up to spread the benefits of the new socio-economic, political and technology developments are opening up across the global food industry.*

*We are a data-led service company, helping a network of firms to reduce waste, become more sustainable, increase supply chain efficiencies and ultimately grow their profits.*

*Conrad Young, Founder, Food Forward Ltd*

*Reducing **food loss and waste** is a great example of consumer demand, corporate sustainability commitments and investment opportunities lining up.*

*Food waste innovation, to tackle the estimated **\$940 billion** lost, is beginning to be funded by retailers, but opportunities in farms, factories and logistics are ripe. That's why this is the focus of our [first short film](#).*

*Meanwhile, others hotspots – from renewable energy to sustainable packaging to ecological production etc – are large and growing. Sign up at [www.foodfw.com](http://www.foodfw.com) to stay in the loop...*

A handwritten signature in black ink, appearing to read 'Conrad', written in a cursive style.

# European food industry leaders boost commitments to halving food waste by 2025



Dave Lewis and Mike Coupe  
CEOs of Tesco and J Sainsbury



Emmanuel Faber  
CEO, Groupe Danone



Conrad Young  
Managing Director, Food Fw



Mike Barry  
Sustainable Business Director, M&S



Bertrand Swiderski  
Sustainability Director, Carrefour

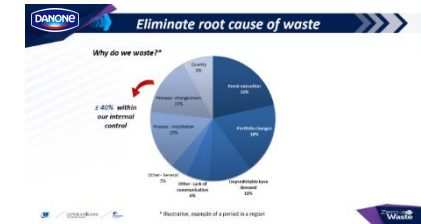
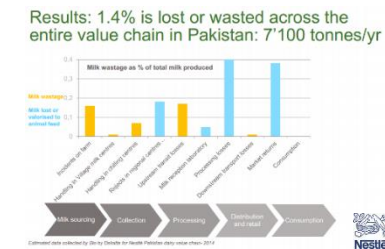


Jeff Seabright  
Chief Sustainability Officer, Unilever





# Industry challenges & innovator solutions

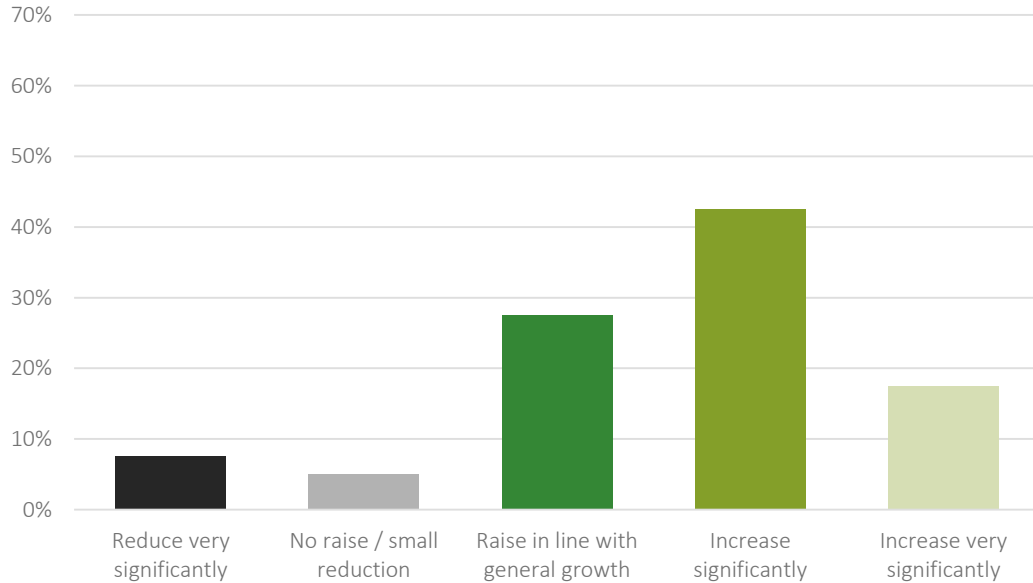


Supply chain stages	Retail	Household	Farm to consumer	Farm to consumer
Location	UK	UK (town pilot)	Pakistan	Global
Product / process	Store food waste	Household food waste	Milk value chain	Resources owned
Indicator	+4% (2015-16)	-22%	1.4% wasted	16% wasted
Drivers	Bread waste	Weighing waste & calculating £ cost	Processing losses, market returns	Portfolio changes, event execution
Innovators				

Sources: Tesco; J Sainsbury; Nestlé/Deloitte; Danone Dairy.

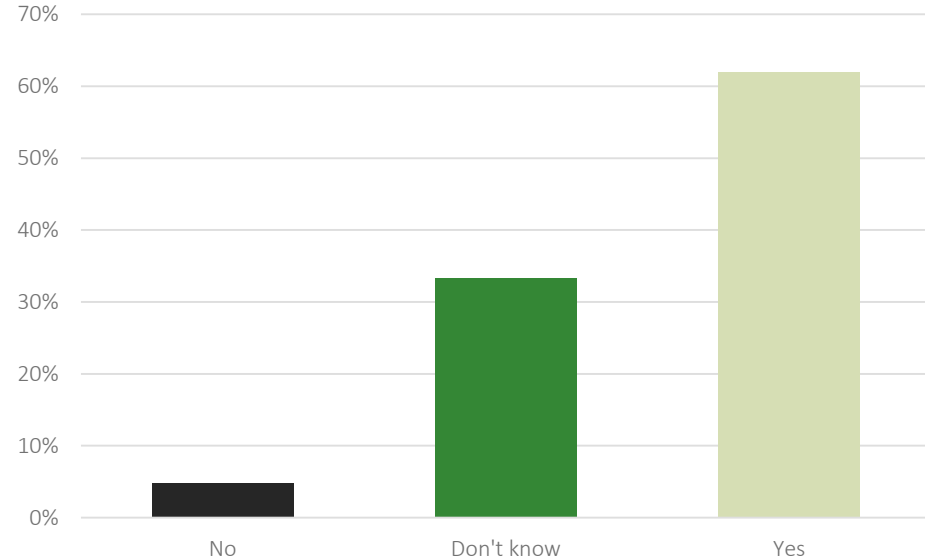
# Where is supply chain investment growing?

What is your board's commitment to investment in SUSTAINABILITY in the upstream supply chain in 2017?



(Source: Food Fw / Consumer Goods Forum)

Is your company committing resources to drive INNOVATION in the upstream supply chain in 2017?



# Food Fw platform sign-ups, event participants & engaged investors

100+ Innovators

This section displays a collection of 20 diverse logos representing startups and innovators in the food and agriculture space. The logos include various symbols such as a target, a leaf, a bar chart, a stylized 'S', a 'D' in a square, a diamond, a bird, a leaf with a drop, a stylized 'im', a wheat stalk, a 'V', a red circle with a white dot, a stylized 'S', a fire, a compass, a flag, an anchor, a stack of leaves, a clock, a fish, a sun, a globe, a cloud with a leaf, 'SS', a green leaf, 'OS', a globe with leaves, and a '1' in a square.

50+ Industry leaders

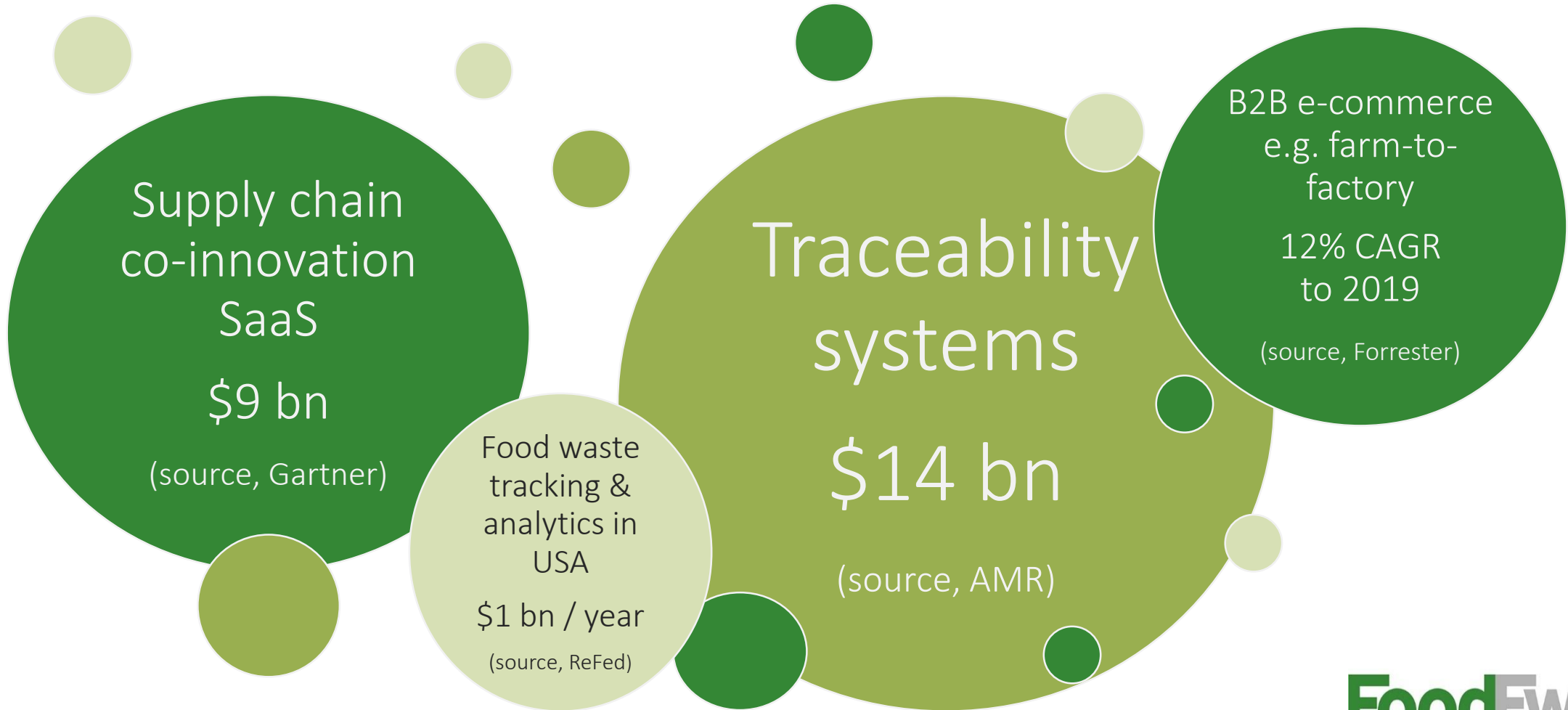
This section features logos of major industry players. The logos include: baxterstorey, Marks & Spencer, Sainsbury's, iglo, Unilever, DANONE, Nestlé, FACCENDA, BARRY CALLEBAUT, 2 sisters Food Group, abp, OLAM, and Louis Dreyfus Commodities.

10+ Investors

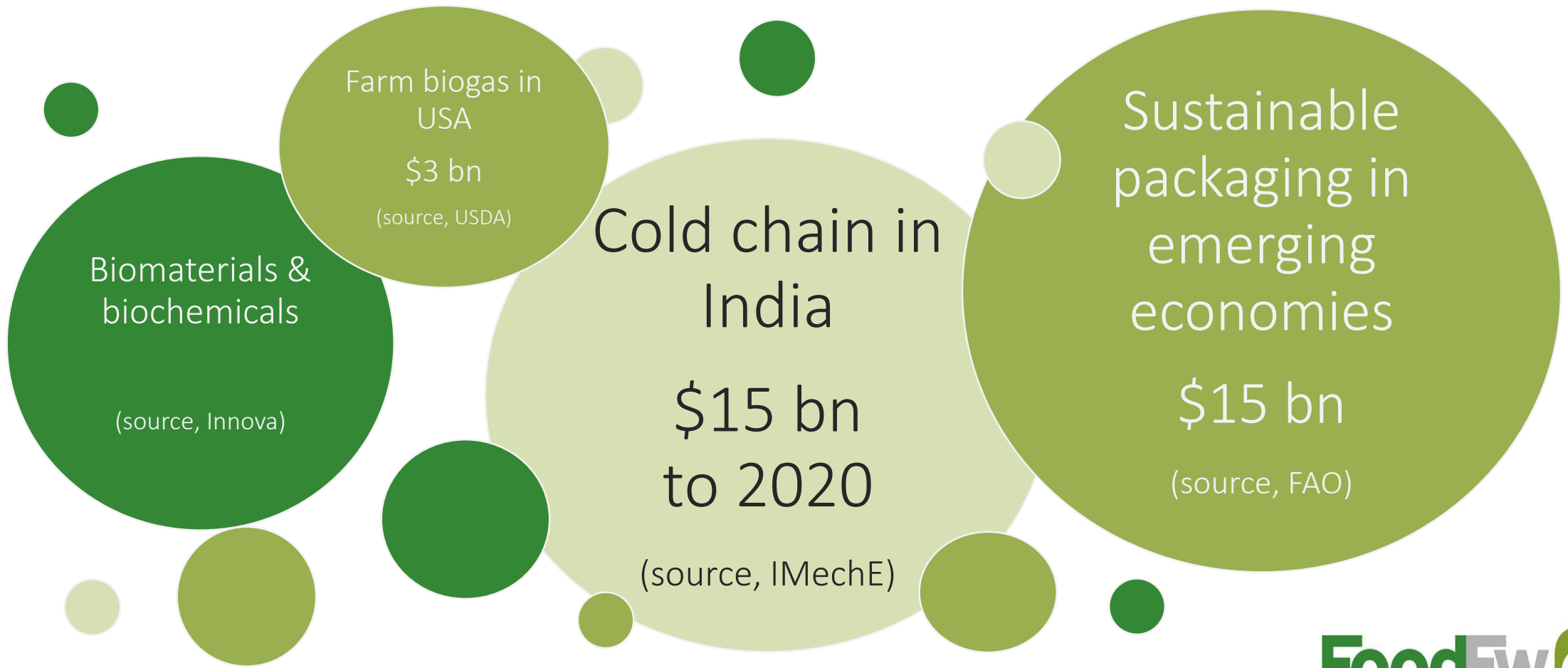
This section lists logos of investors and financial institutions. The logos include: CIRCULARITY CAPITAL, BARCLAYS, Newton Fund, CATALYST PRINCIPAL PARTNERS, GREENCOAT CAPITAL, althelia ecosphere, HSBC, Agriculture Capital Management, CREDIT SUISSE, and IFUSE VENTURES.



# Digital technology categories represented on Food Fw's innovator platform

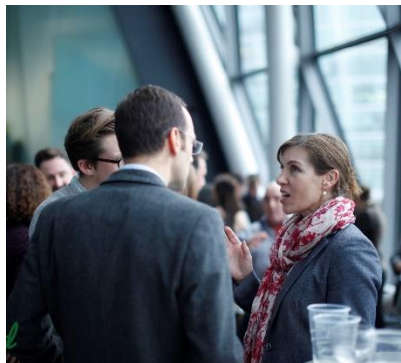


# Process/product technology categories represented on Food Fw's innovator platform





# Event highlight



## London City Hall

- UK's second biggest food retailer
- 12 innovators from Food Fw platform
- Clean tech venture investor
- International bank
- Greater London Assembly Members
- Food Tech Week preview from YFood
- City-level policies for sustainable food sector

J Sainsbury plc



# Looking Fw: Industry

## Conrad Young

- Managing Director of Food Forward Ltd.
- Asda Sustain & Save Exchange – Programme Director
- Tesco Supplier Buying Club – Project Director
- World Bank’s Resilient Cities Network – Program Director



## In 2017:

- Asia will become a greater focus of the industry’s efforts to improve supply sustainability
- Expect greater leadership from some of Japan’s large food companies
- Look out for groups engaging their leading subsidiaries for technology investment in Asia.
- Farm-manufacturer vertical integration will return – with hotspots in Africa
- As chains shorten, competition for sustainable urban food production and logistics increase
- Retailers will lead national food self-sufficiency trends in the US & UK

# Looking Fw: Investors



## Hugo Claessens

- Business Development Director
- TechTour.com – Business Development
- International Venture Club – Business Manager

- Corporate Venture Capital leaders like Google Ventures have already invested in food supply innovators like Farmers Business Network, Momentum Machines and Impossible Foods.
- In 2016 they were followed by Campbell Soup and General Mills launching venturing units.
- As new VCs and traditional CVC players like Dow and Syngenta get to understand the food supply ecosystem better we expect to see strong growth in 2017.
- Traditional commercial banks are also reallocating capital to earlier stage businesses. For those investing in agrifood, sustainability will be a key issue for due diligence in 2017.



# Looking Fw: Market



## Iain Roebuck

- Former Global Supply Chain Director, Danone
- Sales and Operations Planning expertise
- Early years nutrition
- Europe and China expertise

Leading companies like Danone challenge themselves with tough operational targets for sustainability in the supply chain. Unlocking the next level of performance needs better insights into the challenges that hold back food suppliers. Food Fw offers a unique way to gain those insights and support the innovations which can turn those into win-win opportunities.

## The *mottainai* spirit - inspired to avoid waste

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# Sign Up & Contacts

[www.foodfw.com/industry](http://www.foodfw.com/industry)

[www.foodfw.com/innovators](http://www.foodfw.com/innovators)

[www.foodfw.com/investors](http://www.foodfw.com/investors)

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