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SPECIALITY & FINE FOOD FAIR 6-8 SEPT 2020 OLYMPIA LONDON

SPECIALITY FOOD MAGAZINE

COTSWOLD FAYRE -EST 1999-

THE SUSTAINABILITY REPORT 2020

STATISTICS ● INSIGHTS ● SOLUTIONS

- How important is sustainability, really?
- What's shaping consumers' retail decisions?
- Realising responsibility

STEPPING UP TO THE PLATE



Sustainability is a subject hot on the lips and fingertips of shoppers, brands and decision-makers across the planet right now – and no wonder. The wave of realisation that began with Blue Planet II in 2017 has become a rip tide, transforming murmurs of idealistic change into powerful must-act-now statements.

The developed world is recognising the part it has played in the gradual degradation of our environment, and no sector is exempt – especially the food industry – but it's not only our comfort and bottom lines that are at stake, with often the smallest players in this change experiencing the largest impact.

Thankfully, brands, retailers and governing bodies are stepping up



to the plate, making swift changes where possible and vowing to take big action where needed. Here, together with industry greats Cotswold Fayre and Speciality & Fine Food Fair, Speciality Food has gathered the statistics, insight and inspiration you need to move forward on this increasingly important topic.

HOLLY SHACKLETON | EDITOR

"**75%** OF UK **SHOPPERS** WANT **SUPERMARKETS** TO **ONLY** STOCK FOOD FROM **SUSTAINABLE** AND **ETHICAL** SOURCES"

SOURCE: LLOYD'S REGISTER

"The world has woken up to the impact of food and agriculture on our environment and our climate – from now on the sustainability of farming and food systems is no longer marginal, its role is of central importance in addressing climate change"

PATRICK HOLDEN, SUSTAINABLE FOOD TRUST



PAUL HARGREAVES, COTSWOLD FAYRE

"Don't let perfection get in the way of progress"

Like several other businesses, Cotswold Fayre declared a climate emergency in 2019. Every business must realise their responsibility of being part of the solution to climate change as we and our predecessors in the western business world have created a large part of the problem during the past two centuries.

Clearly words are empty unless followed by action. In August 2019, Cotswold Fayre announced that we would be net zero for carbon. We did this by changing our logistics model, which reduced the distance our orders travelled by 1.7 million kilometers, and by off-setting all the remaining carbon in the business. Off-setting is only a short-term solution until we are able to be completely carbon neutral, which we will do as soon as electric lorries are available that can cover the distances we require. Until then we are assessed by an external organisation (carbon.neutral.com) and off-set our carbon in two projects in Central and South America.

Our supplier conference in May 2019 had only one agenda – climate change. It was a remarkable business event, the like of which I have never seen before. Many of us were emotional as we confronted the damage we have done to the world, and feeling emotion is important, as it is generally what leads to change. We asked everyone to write down an easily-implemented personal and work change on a Post-it Note, and we have displayed these in our office as a sign of things to come.

One of the main messages coming out of the day was "Don't let perfection get in the way of progress." The danger with climate change is that we think that anything we do to change will be insignificant and unsubstantial, but this attitude can lead to inaction. It's better to all strive to make constant improvements; collectively these make a huge difference to the world.

By all of us changing ourselves, encouraging and incentivising our employees to change and insisting our suppliers change, progress will be made. Don't delay, declare a climate emergency in your company today!





ELENA ATTANASIO, EVENT MANAGER

Promoting sustainability at Speciality & Fine Food Fair

Sustainability has fast become an important topic within the food and drink sector, from processing and packaging, wastage, materials and even transit solutions. We all need to do our part in providing a solution to this ongoing challenge and in response to this, Speciality & Fine Food Fair is taking action to make our operation as sustainable as possible.

How do we intend to do this? As part of our ongoing initiative to take care of our planet as well as our people, we have created a dedicated Sustainability Zone within our 2020 showcase, taking place 6th-8th September. Within this zone we will be removing the carpets, reviewing our choice in shell scheme to reduce unnecessary use of materials, and taking more consideration of the overall type of materials being used around the Fair.

Not only is it important to us that we take steps to be more sustainable at the Fair, but also that our exhibiting producers aim to be more sustainable too, and we will be reviewing five key areas with anyone featuring within the Sustainability Zone:

- Waste & Recycling
- Energy
- Packaging
- Raw materials
- Water

As our Sustainability Zone takes shape, we are excited to see that it has already piqued the interest of some very exciting brands, with sustainability at the heart of their mission.

Alongside this exciting new feature, we will be hosting all the classic industry favourites such as our content-packed panel discussion stage, featuring some of the most forward-thinking and thought-provoking sessions on all those key industry issues. In addition, we will be hosting a collection of established and up-and-coming chefs at our live demo kitchen where delicious dishes will be prepared daily.

If you want to showcase your contribution to sustainability within your establishment or are revolutionising your industry, then there is no better time to get involved – get in touch to tell us what you're up to. You can also keep an eye on our website to stay up to date with this exciting project and find out all the latest improvements being made to Speciality & Fine Food Fair 2020.

Follow us at #SustainabilityatSFFF across Twitter - @SpecialityFair, Instagram - @Specialityfair and Facebook - @SpecialityFair.

See you in September!



"Previous research from Kantar has shown that the food category has historically enjoyed more trust than other categories such as personal care. However, given the types of environmental issues that are now most important to consumers and the fact these factors are influencing their decisions, food manufacturers can no longer rest on their laurels"

MARK CHAMBERLAIN, KANTAR WORLDPANEL

SHOPPER POWER

"In the last 12 months, over three quarters of consumers have switched, avoided or boycotted products based on brands' environmental policies"

83% OF CONSUMERS SAY THAT TODAY'S ENVIRONMENTAL ISSUES ARE IN PART CAUSED BY LACK OF RESPONSIBILITY TAKEN BY LEADING BRANDS

MEN ARE MORE PREPARED TO SWITCH OR BOYCOTT BRANDS THAN WOMEN

OVER HALF RANK OVERUSE OF PLASTIC AND PACKAGING IN THEIR TOP THREE CONCERNS

Source: Mintel

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FOOD WASTE

● How much food waste does each sector create?
● Decide to do things differently ● Acting on food waste

"STILL A GREAT DEAL OF WORK TO DO"

Alan Hayes, Head of Technical Programmes at IGD



The food and drink we consume forms the single biggest part of our sustainability impact, and thus our contribution to climate change; bigger than the emissions created from travel and from the energy we use at home. Therefore, reducing food waste is very important in efforts to address climate change.

In September, we celebrated the first anniversary of IGD and WRAP's ground-breaking Food Waste Reduction Roadmap, developed to help food and consumer goods companies adopt a consistent approach to Target, Measure and Act on the food waste they create. The roadmap aims to help the UK achieve both the (UK) Courtauld Commitment 2025 targets, and the (international) United Nations' Sustainable Development Goal (SDG) 12.3. The roadmap is hugely ambitious, and the UK was the first country in the world to set a nationwide plan of this size, scale and ambition.

At the time of writing, 162 UK food businesses have already committed to target, measure and act on food waste, representing more than half of the UK food industry by turnover. Many are already providing evidence to WRAP of their work to reduce waste. In addition, more companies than ever are reporting their food waste data publicly.

The 121 businesses now reporting on their waste have a combined turnover of more than £220bn and generate over 1.1 million tonnes of food waste in their own operations. This shows what a difference can be made when industry works together, even in such a short time frame. There is still a great deal of work to do, but the progress to-date has been significant.

"IF FOOD **WASTE** WAS A **COUNTRY**, IT WOULD BE THE **THIRD-LARGEST** CONTRIBUTOR OF **CARBON EMISSIONS** AFTER THE **US** AND **CHINA**"

SOURCE: FAO 2015

SURPLUS FOOD IS AN ISSUE ACROSS THE FOOD INDUSTRY. IN TONNES, THIS IS HOW MUCH EACH SECTOR CREATES:



FARMING: **100,000-500,000**

RETAIL: **47,000-110,000**

PROCESSING & MANUFACTURING: **52,000-160,000**

WHOLESALE & DISTRIBUTION: **80,000-120,000**

Source: WRAP

"APPROXIMATELY **ONE-THIRD** OF ALL THE **FOOD** PRODUCED IN THE **WORLD** IS **LOST** OR **WASTED**"

SOURCE: WRAP

ON THE GROUND: TOAST ALE



James King, marketing and brand manager

Toast Founder, Tristram Stuart, is an environmental activist and long-term specialist on food waste – starting the charity Feedback. Toast began when he visited Brussels and tried Babylone, a beer brewed with bread and based on an old Babylonian recipe. When he tried it, he immediately saw three ingredients for something special:

- *He knew where industrial quantities of day-fresh bread were being wasted all over the world*
- *The craft brewing movement had become a global super trend*
- *He had spent the past 20 years catalysing a global movement of food waste activists and entrepreneurs.*

Bring all these three phenomena together and you have a delicious pint-sized solution to food waste.

HOW DOES IT WORK?

Toast combines surplus fresh bread with malted barley in their grain bill – the bread replaces one-third of the malt typically used to brew beer. Bread is packed with carbohydrates, which are broken down to simple sugars by enzymes in the barley. Hops are added for aroma and bitterness, and to help preserve the beer. Finally, yeast converts the sugars to alcohol.



ENVIRONMENT

- Organic farming in figures
- Demand for reduction of single-use plastic
- Reducing your carbon footprint

Moving away from single-use plastic



Martin Wickham, food and drink investment specialist at the Department for International Trade

For a long time, plastic packaging has been widely used across the food sector as it protects food from spoiling, allowing it to travel further distances and stay longer on shelves. However, single use plastic leads to environmental degradation, loss of biodiversity, and climate change. There are also concerns about the adverse health implications.

Globally we produce about 359 metric tonnes of plastic a year, which is set to double by 2035 and quadruple by 2050. This has led to increasing pressure from retailers, industry stakeholders and the government to develop sustainable packaging for food and drink as the industry is responsible for 40% of this global plastic production.

However, the biggest pressure is actually coming from consumers themselves, with nine in 10 UK consumers wanting all their food and drink packaging to be recyclable, and 88% of shoppers wanting on-packet information on packaging sustainability. The Department for International Trade (DIT) is helping UK businesses respond to this demand.

HOW TO REDUCE YOUR CARBON FOOTPRINT



Tom Cumberlege, associate director of the Carbon Trust

Carbon impacts vary significantly across the food and drink sector as farming, transportation, packaging and the processing of food and drink items all contribute towards the carbon footprint of an organisation or product. The key steps to carbon footprint reduction are:

1 *Measure the full lifecycle impact of a food and drink product and identify the main carbon emissions hotspots. These will differ depending on the nature of your business. For a soft drinks manufacturer these could be in the packaging (sourcing/recycling of aluminium cans or PET bottles). For a dairy processor, the main impact will be back on the farm and the management of the dairy herd that produces the milk.*

2 *Develop a plan to reduce these emissions. This is not limited to actions within your own organisation – engagement with supply chain partners is essential.*

3 *Provide transparent communication to customers. Outline how your business has measured the impacts and what actions you are taking to address the most material impacts.*

474,000 HECTARES ARE FARMED ORGANICALLY IN THE UK

8% OF THE UK'S ORGANIC AREA IS USED TO GROW CEREALS

3.3% OF THE UK'S CATTLE IS REARED ORGANICALLY

70% OF THE UK'S ORGANIC LAND IS ACCOUNTED FOR BY PERMANENT GRASSLAND

THERE ARE **6,200** ORGANIC OPERATORS IN THE UK

61% OF THE UK'S ORGANIC LAND ENGLAND IS IN ENGLAND

SOURCE: Department for Environment, Food & Rural Affairs

"Over 70% of consumers agree the response from businesses to the environmental damage being caused to our planet is 'too little, too late'"

SOURCE: KANTAR WORLDPANEL



PRODUCTION

● The power of small businesses ● How to become more sustainable ● Case study: Blue Goose Coffee

"Small businesses are the true creators of positive change"

CASE STUDY: LEX THORNELY, CO-FOUNDER OF BLUE GOOSE COFFEE



It was when visiting a waste processing facility that Nick [co-founder] and I first understood the scale and threat that coffee capsules posed to our planet. It was also really evident that the big pod manufacturers were too heavily invested in materials like aluminium to consider alternatives, while others were taking advantage of the huge growth in capsule coffee popularity and pumping out cheap plastic capsule offerings filled with equally cheap commodity grade coffee. None of this sat right with us. Not just because of our own morals and realisation of the effect mass consumption and its waste was having on our environment, but because we also knew there was a realistic alternative behind the smoke screen that the bigger brands were so eagerly creating to propel the capsule gravy train.

INVESTING IN THE FUTURE

We're not in the game of token gestures. We're literally roasting eco into our product offerings, our materials and our supply chain rather than just jumping on the eco band wagon. Yes it's more expensive, especially when investing in sustainability throughout every part of our offering, from FSC board and vegetable inks to being the first capsule company to adopt plastic free glues to secure our boxes. But following your heart rather than the endless pursuit of profit means your focus and outlook are very different from those of big businesses. It's a mentality that is also making total business sense in today's world, so why pursue any other path?

NEXT STEPS

One of our projects is to embrace carbon capture technology and actually extract the equivalent of our carbon emissions out of the air rather than just offset through planting trees, for example. We're also tackling plastic pallet wrap, which is utterly horrid stuff, pushing changes back up through our supply chain while working in partnership with the University of Exeter on a Government-funded project investigating alternatives to fossil-based materials for plastics and how to improve post-use reclamation.

HOW TO BE MORE SUSTAINABLE

Q I want to boost the sustainability of my business. How do I get started?



A Prioritise action towards the most significant environmental impacts of your business," says Dr Martin Wickham, food and drink investment specialist at the Department for International Trade. "This could be in the supply chain, packaging, transportation, or your own operations. Collecting data from suppliers is the first step in starting a dialogue on managing environmental impacts. Set clear expectations across your operations and supply chain partners that measuring environmental impacts and target setting is important to your business. Consider setting science-based targets; aligning your ambition to the goals of the Paris Agreement."

"THE **WASTE** AND **RESOURCES** ACTION PROGRAMME (WRAP) AIMS FOR **100%** OF **PLASTIC** PACKAGING TO BE **RECYCLABLE**, **REUSABLE** OR **COMPOSTABLE** BY **2025**"

SOURCE: DIT



"We really believe that saving the world starts with positive action – no matter how big or small. There's a danger that businesses are paralysed when confronting the scale of the climate crisis we face. The best thing to do is get started – think small and then go bigger – it's amazing how quickly impact can accumulate. All it takes is the decision to do things differently for the planet"

JAMES KING, TOAST ALE



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● How markets are going eco ● Retail pioneers
● Anti-food waste formats

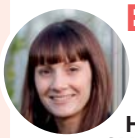
CASE STUDY: **PLANET ORGANIC**

We work our socks off to minimise food waste in the first instance, but we do inevitably have some waste," explains Peter Marsh, CEO at Planet Organic. "We spent years scouring the market for a partner with the necessary food handling processes to redistribute this unavoidable waste, and OLIO was the first we came across that had the necessary capabilities. We have seen some enormous benefits since embarking on our partnership, and if more companies engaged with this wonderful initiative the amount of food wasted could be dramatically reduced, not to mention the enormous impact it can have in addressing issues relating to poverty and hunger in communities."



"The growth of organic into foodservice increased steadily again this year – by 7.8%"

SOURCE: SOIL ASSOCIATION



EVENT SPOTLIGHT:

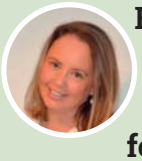
ALDEBURGH FOOD & DRINK FESTIVAL

JESS BROWN, EVENT ORGANISER

HOW DOES THE EVENT CATER FOR SUSTAINABLE SHOPPERS?

- Reusable shopping bags
- Sourcing local for services and products when possible
- Promoting the 'shop local' ethos
- Bus shuttle services to reduce traffic
- All the site waste is collected and then sorted for best recycling results

TRADE TALK



Rebecca Barratt, director of communications and marketing for Covent Garden Market Authority

"Questions from the traders' customer base around sustainability are growing year on year, and following our recent 2020 trends survey, queries around plastic reduction are particularly prominent. The traders have reported requests such as no window brown bags for single items, as well as a reduction in excess packaging and calls for reusable boxes.

"Customers on the market are also buying more loose produce over pre-packaged versions in a bid to improve their sustainability practices. However, not all customers are committed to this, which can present a challenge for traders who are considering using more expensive packaging, such as starch based bags."

HOW TO: **BE BEST IN CLASS**

"Single use packaging affects all food businesses, no matter what the size, speciality, or where you sit in the supply chain. But happily, it's also something you can do something about – whether you're a producer making choices about your retail packaging, a retailer deciding what products to stock, or even as a consumer choosing what to buy. The best way to start is to ensure that what you already have is best in class. Do an audit to really understand what your packaging is made of, what can be done with it at end of life, and speak to your suppliers to see how you can improve material content and recyclability. Otherwise you're just leaving your packaging problem with the consumer, which is becoming socially unacceptable as well as a brand risk given how vocal some consumers can be on social media against products they don't like. Once your offering is the best it can be, then you can think about how you might improve and take advantage of the new zero waste movement – can you produce or sell products in bulk with no packaging, or in reusable packaging? That's where the magic lies."

CATHERINE CONWAY, FOUNDER OF UNPACKAGED

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BUSINESS

● Being the change you want to see ● The danger of greenwashing ● The value of certification

PRODUCER SPOTLIGHT: **DOISY & DAM**

Ed Smith, co-founder



WHY REGISTER AS A B CORP?

We've always wanted to build a sustainable and responsible business from day one; both for personal reasons and because cocoa can be an ethically murky raw material to deal with and we had the opportunity to address that. We initially thought that having a personal audit of our business would be the best way forward, but coming across the B Corp certification made us change our mind. It allowed us to look at more than just our sourcing, but also our social, environmental and ethical approach to business as a whole. It also presented us with a structure to monitor and continue to improve our ethical approach.

WHAT CHANGES HAS THIS LED TO?

We've changed our supply chain to ensure that all of our cocoa is fully traceable back to its original source. Working only with Colombian producers, we personally make sure that we have one of the most ethical and carefully sourced supply chains of any chocolate business. We are also in the process of applying this approach to our packaging, with a goal to use 100% recyclable packaging by the end of next year. Doing good is at the heart of our company values, ensuring that everyone who works at the company is of the mindset to leave behind more than we take. Overall, being a certified B Corp gives us clear guidelines as to how we should act as a business and helps with every decision we make.

"We need 'morally conscious' approaches"



Kate Cawley, founder of Veris Strategies

"Food is not only wasted on an unprecedented level, it is often produced at the expense of unnecessary animal suffering, human rights, equality and environmental protection.

"It's clear that morally conscious approaches can be better applied and promoted when it comes building more resilient, resource-efficient food systems. Importantly, these approaches can help address the ethical issues that matter most to consumers – animal welfare, meat reduction, fairer farming, reforestation and food security."

"**ETHICAL** FOOD AND DRINK [IS] UP **16.3%**, THE **LARGEST** INCREASE SINCE **2012**, FUELLED BY **GROWING** SALES OF **VEGETARIAN** PRODUCTS"

SOURCE: ETHICALCONSUMER.ORG

"There's huge risk around greenwashing..."

CHARLOTTE BAKER, CONTEXIS

"... Which is where we believe organisations like B Corps have a big role to play. Your purpose isn't necessarily your end point but something you have to keep alive. A lot of companies will say they're not always going to get this right. So Unilever under Paul Pulman had a focus on more sustainable brands, but accepted they can't change the world overnight... I think that's more credible. People aren't idiots, but when green washing becomes a marketing message, the risk is that nothing meaningful gets done. Everyone wants to go to work feeling they'll make a difference."

"There's a lot of talk about 'purpose' and what businesses are all about, and that's great - but is it just words? Purpose is a timeless statement of why you exist, why you deserve to exist"

"OVER A **QUARTER** OF THOSE WHO **RESPONDED** TO OUR **YOUGOV** SURVEY STATED THAT THEY HAD **AVOIDED** BUYING A **PRODUCT** OR USING A **SERVICE** DUE TO ITS NEGATIVE **ENVIRONMENTAL** IMPACT IN THE PAST **YEAR** – AN INCREASE OF **65%** SINCE **2016**"

SOURCE: ETHICALCONSUMER.ORG

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PEOPLE

● The global impact of our choices ● What is a social enterprise? ● Promoting sustainability to consumers

"It's easy to say our actions don't matter"

MAURICE SADLIER, DIRECTOR OF PROGRAMMES FOR WORLD VISION IRELAND



"At the end of 2019 I sat with a group of women smallholder farmers under a large mango tree in Ndala, Tanzania to talk to them about our programmes and to hear how our work was improving their and their children's lives.

"Behind us land preparation was in full swing for the planting season that was about to start with the oncoming rains. I asked how the last season's harvest had been – not good was the answer – they had suffered periods of drought delaying planting and then heavy rains damaging crops: changing weather patterns as a result of climate change.

"These women did not own a car or have electricity in their homes or have any of the benefits of the fossil fuel-based development that we have. But being among the poorest and least resilient members of our society they are those hardest hit by the impacts of climate change. This is the injustice of climate change – those least responsible are most impacted.

"These women's ability to provide food for their children was impacted by climate change. Unlike other issues, climate change knows no international boundaries and – like it or not – our choices, including food choices, have a global impact.

"Our choices matter; being more conscious about our food consumption and waste is essential to combat climate change. It's easy to say that we are a small country or only one person and our actions don't matter, but they do. Change needs to happen at an individual and societal level. We need to reduce our meat intake, make more sustainable food choices and reduce our food waste.

"Reducing our carbon footprint and making sustainable food choices is not only essential to combat climate change and meet the development needs of women like those in Ndala, Tanzania today, but also to ensure we leave a health planet for generations yet unborn."

> "Unlike other issues, climate change knows no international boundaries and – like it or not – our choices, including food choices, have a global impact"

HOW TO PROMOTE THE SUSTAINABILITY MESSAGE

- Small changes that are easy to understand are influencing changes to diets and food choices
- People are challenging where information comes from
- They are drawn to sustainability campaigns from sources they perceive as trustworthy
- The messaging is strengthened by simple, visual communications that elicit an emotional response
- Messaging is even stronger when people can take simple action themselves

> "The messages that are cutting through are simple, blunt and visually memorable"

SOURCE: SOIL ASSOCIATION

SOCIAL ENTERPRISE (NOUN):

The term 'Social Enterprise' is defined by Government as "a business with primarily social objectives whose surpluses are principally reinvested for that purpose in the business or in the community, rather than being driven by the need to maximise profit for shareholders and owners."

