

Making the cold chain work for shoppers

Susan Barratt
Chief Executive Officer

Presentation to Cold Chain Live!
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from **IGD**



What I'll cover today

1

**Shopper
experience**

2

**Industry
challenges**

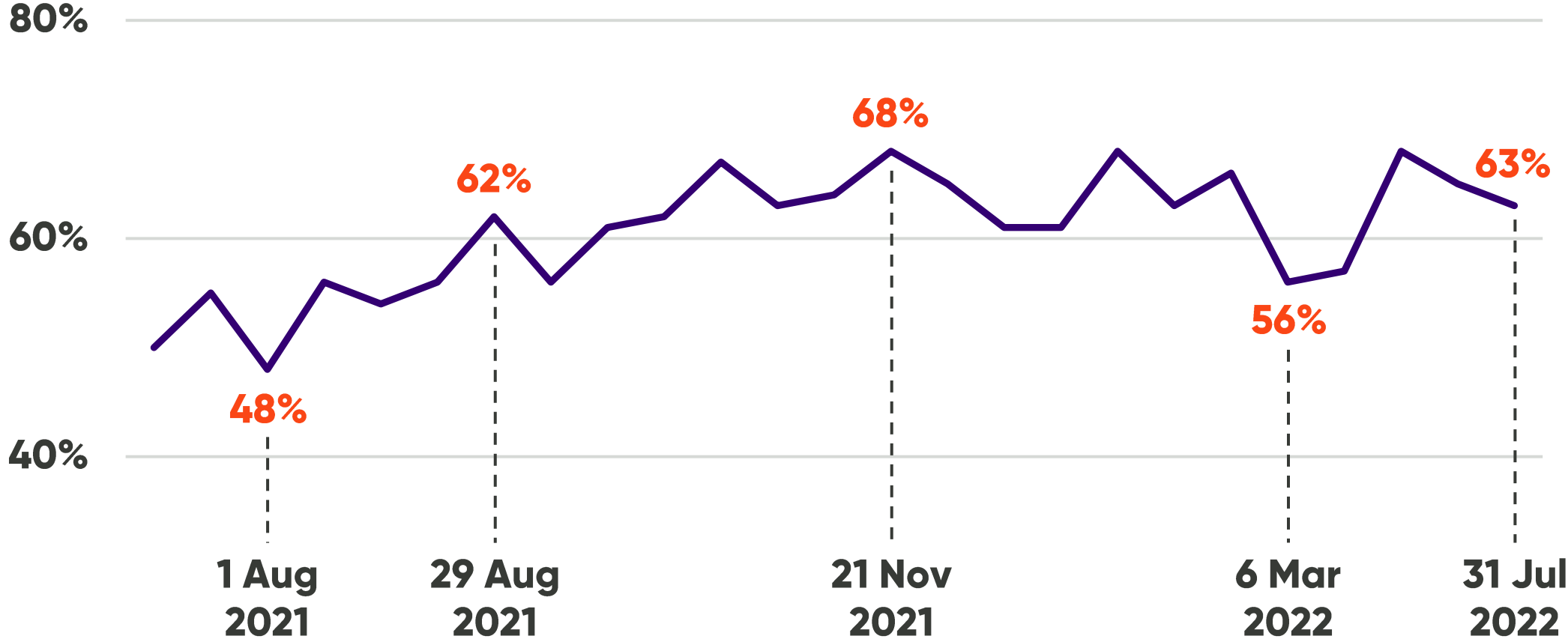
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**What can
Government
do?**

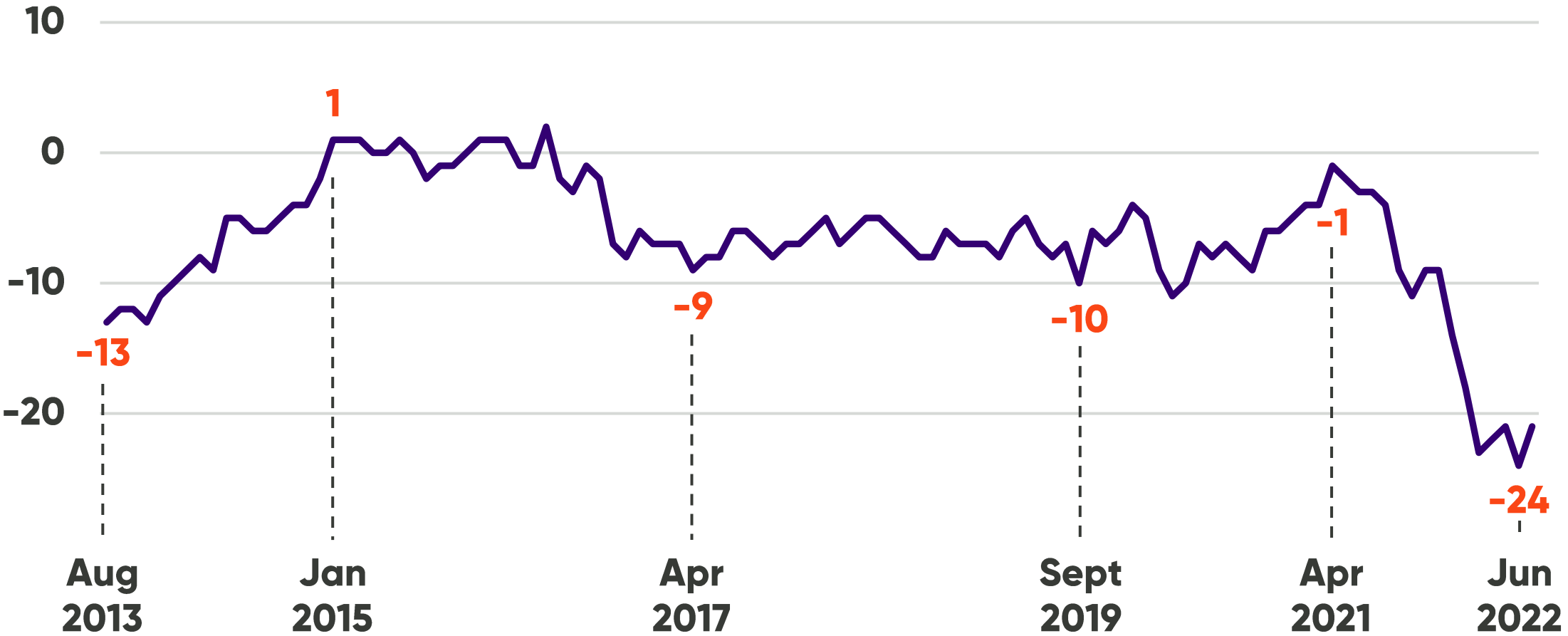
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**Industry
next steps**

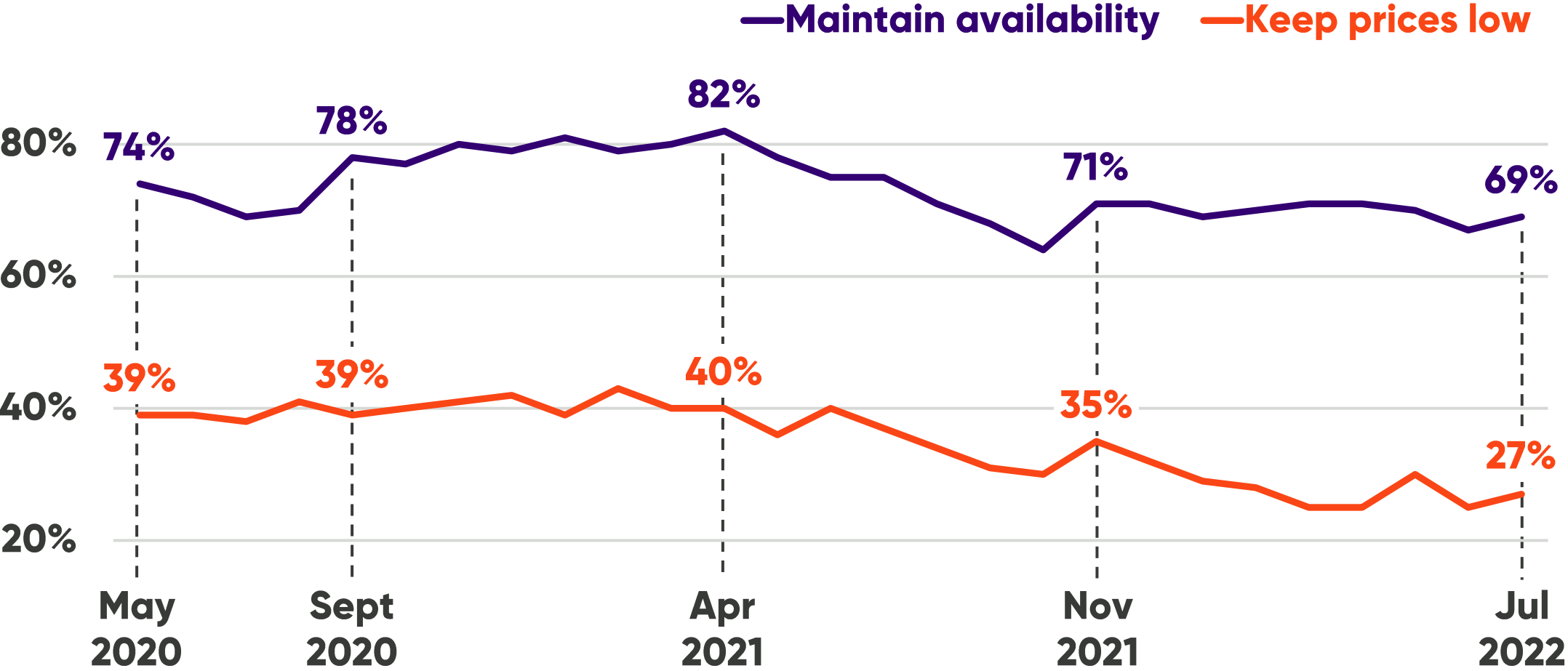
On-shelf availability is poor



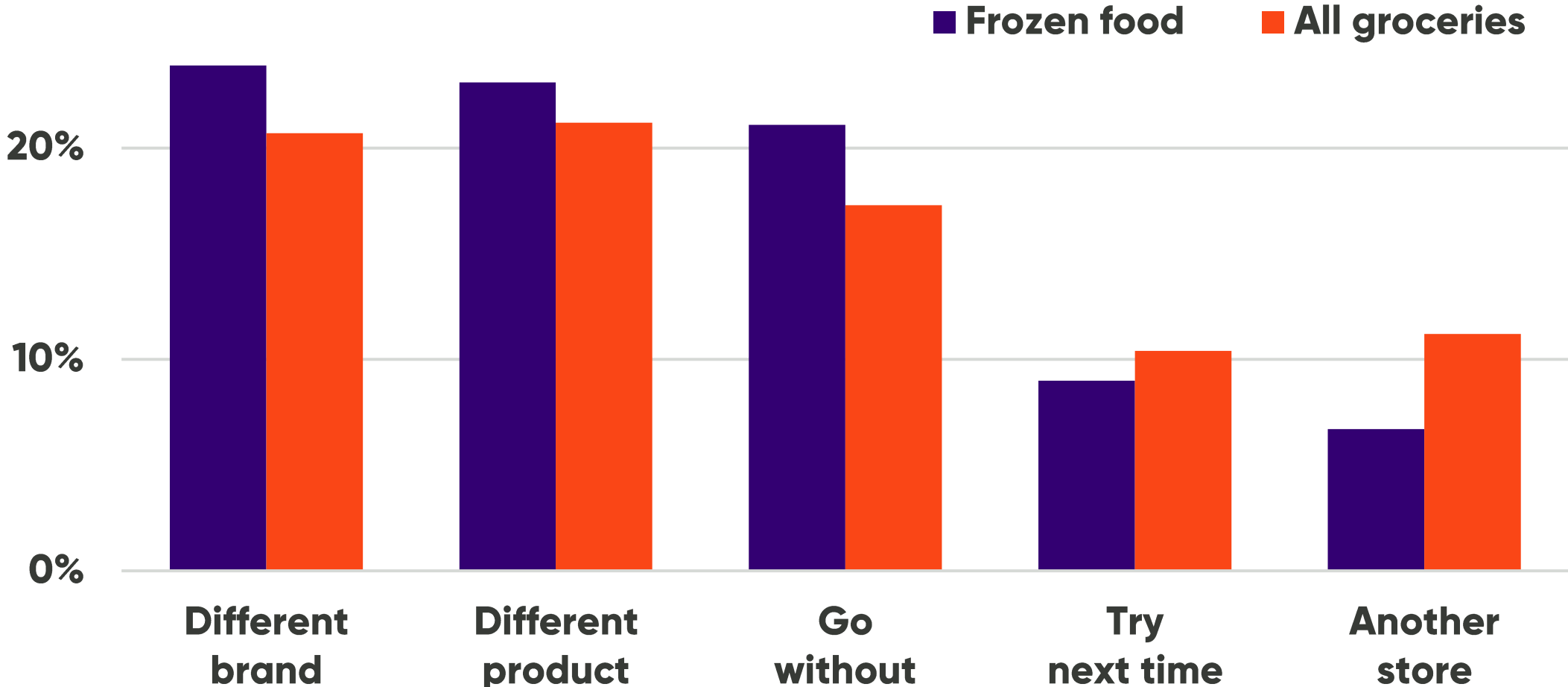
Food shopper confidence at an all-time low



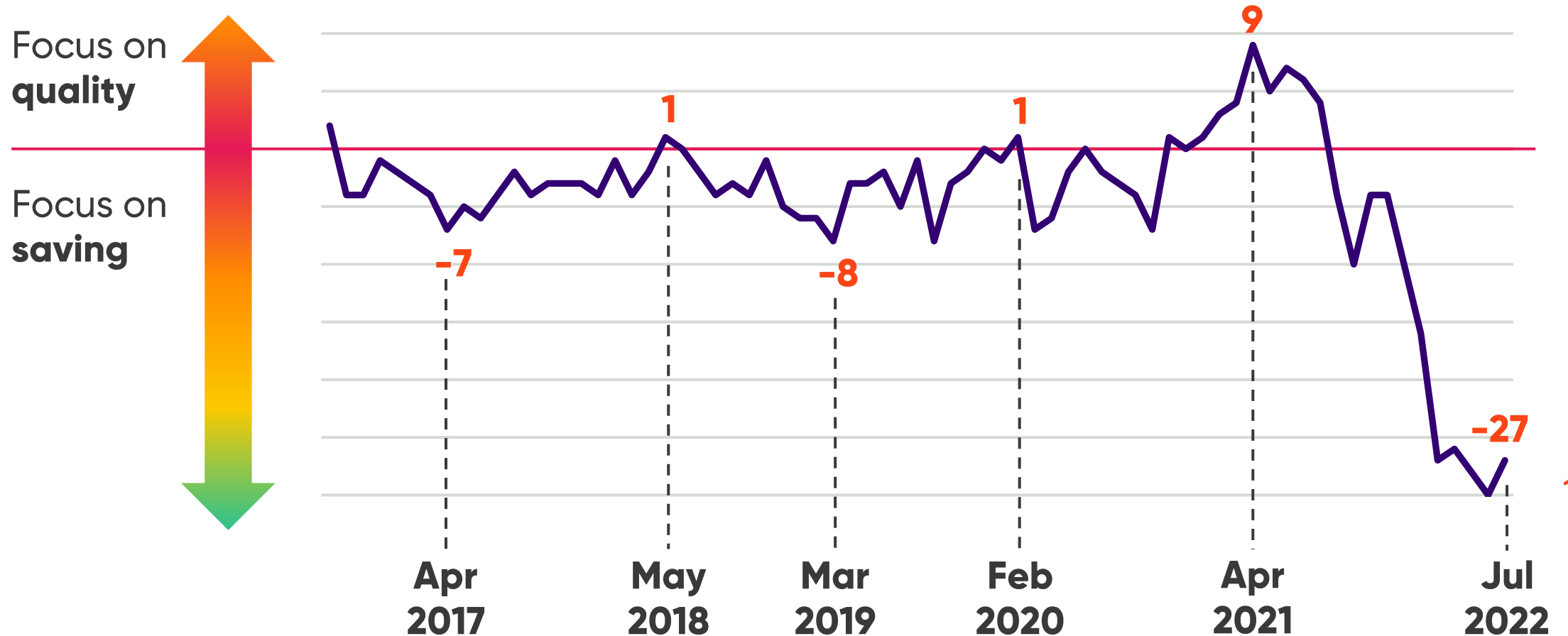
Shopper trust is falling



What happens when goods are out-of-stock?



Shoppers are prioritising saving money



Common approaches to saving money in-home

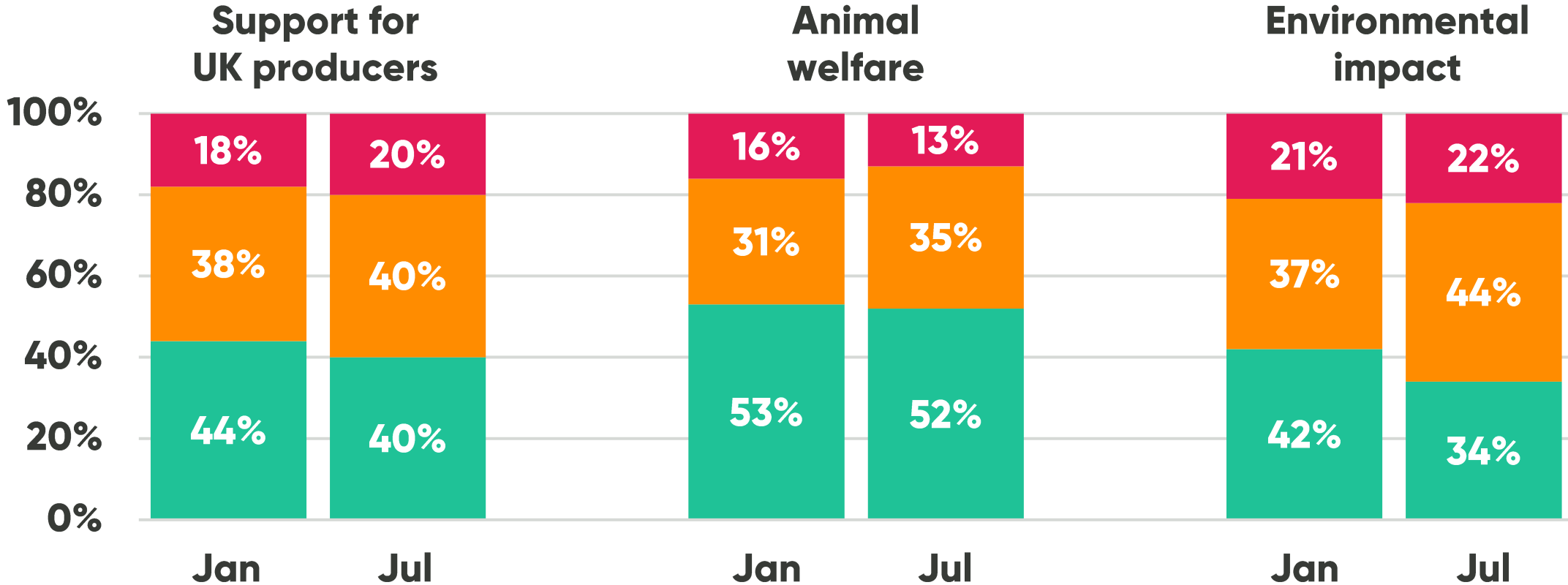


...and some approaches for saving in-store



For some, ethics *may* be taking a lower priority

■ Not important ■ Fairly important ■ Important



Trying to save money

22m

**cutting back on
eating and
heating**

6m

**unable to cut
back their
spending**

5.8m

**turning to
food banks**

Industry challenges



Supply chain



**Inflation –
cost of living**



Climate change

What can Government do?

Where will our food come from?

- ▲ International vs UK sourcing
- ▲ 60% self-sufficient today

How will it cross borders?

- ▲ EU-UK movement
- ▲ New border technologies

How will it move about?

- ▲ Electric and hydrogen vehicles
- ▲ Autonomous operation



What can Government do?

What will we eat?

- ▲ Healthy and sustainable diets
- ▲ New food technologies

Who will do the work?

- ▲ Demographics
- ▲ Migration

Where will waste go?

- ▲ Legislation and taxation
- ▲ New waste technologies



Industry next steps

Durable supply chains

Labour supply

Productivity

Data and technology

Sustainability

Industry next steps

**Durable
supply chains**



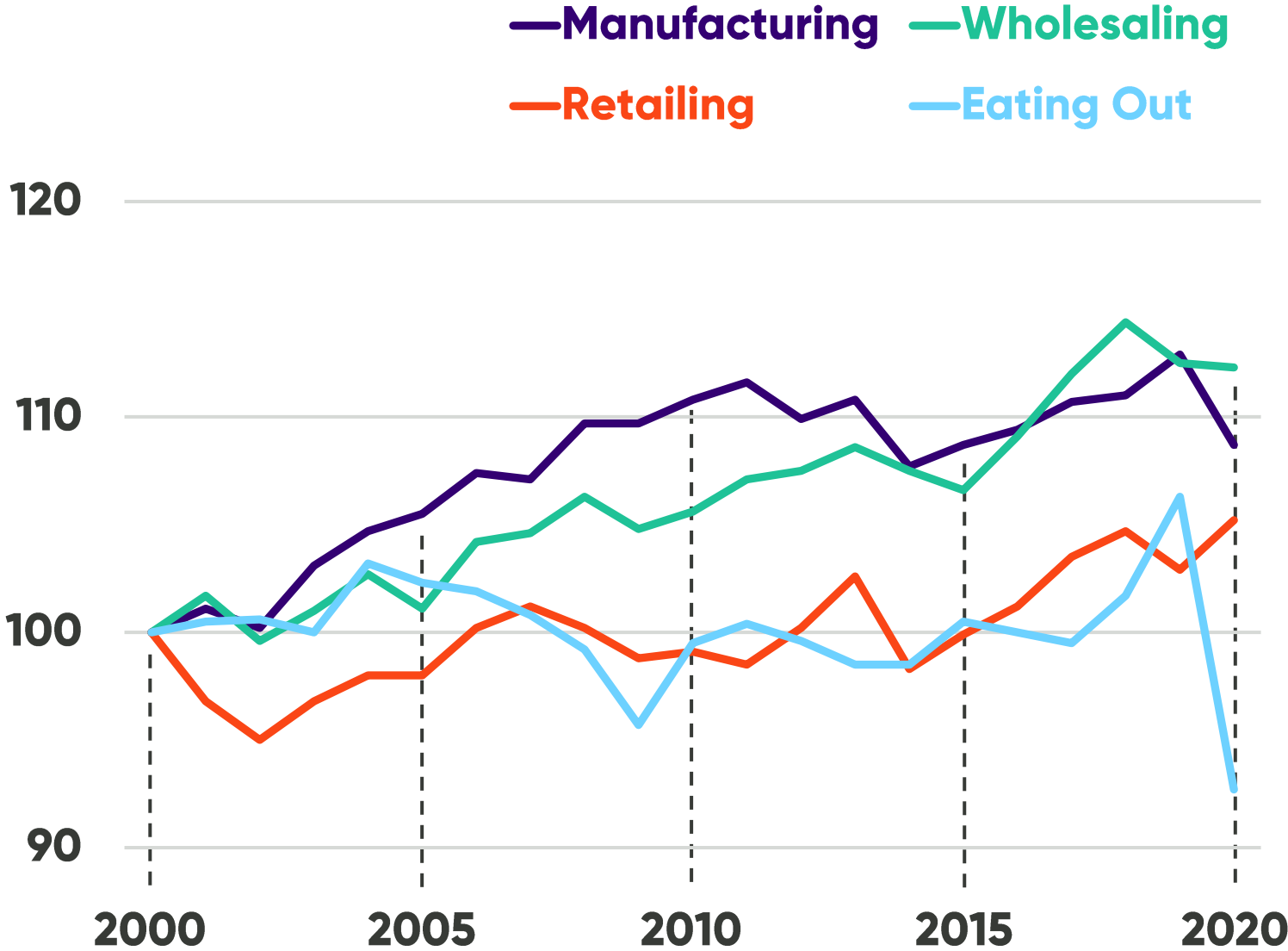
Industry next steps

**Labour
supply**



Industry next steps

Productivity



Source: Food Chain Productivity, Defra, 2022. Total factor productivity (index, 2000 = 100)

Industry next steps



Boots
Flying drone for
medicine delivery

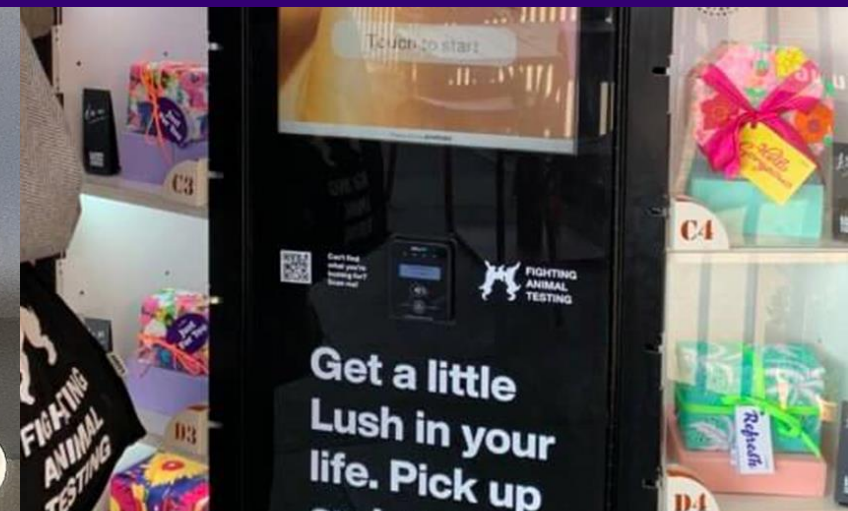


Asda
Automated mark down system
to reduce food waste

Data and technology



M&S
Connie the Countingpillar,
stock checking robot



Lush
24-hour unattended retail
at Kings Cross

Industry next steps

Sustainability

- ▲ Measurement, transparency
- ▲ Logistics
- ▲ New packaging solutions
- ▲ Transition from fossil fuels
- ▲ Waste



1

**Shopper
experience**

2

**Industry
challenges**

3

**What can
Government
do?**

4

**Industry
next steps**

Together

Commercial
Insight



Social
Impact

we are working to drive change
that makes a tangible difference for
Society, Business and the **Individual**



Health



People

Social Impact from **IGD**



Sustainability



Economics

IGD

Thank you