



FOOD SYSTEM TRANSFORMATION: SUPPLY CHAIN

INSIGHTS AND ACTION STEPS FOR FOOD LEADERS SHAPING HEALTHIER, MORE SUSTAINABLE FOOD SYSTEMS

A future-fit supply chain can't be built on good intentions and fragmented partnerships. It requires shared risk, mutual trust and courageous action from field to boardroom. Right now, too many food businesses are still treating the supply chain as a cost to control, not a strategic system to shape. But farmers can't adapt in isolation, and manufacturers can't build resilience alone. We need to move from transactional thinking to trusted collaboration - rooted in long-term relationships, not one-off initiatives.

FROM TALK TO TRANSFORMATION: FOUR MOVES TO BUILD A FUTURE-FIT SUPPLY CHAIN

1 Trust is the number one currency

In supply chains, sincerity in actions, relationships with farmers and a shared mission are foundational. Build long-term, transparent partnerships with farmers; follow through on agreements and work together with sincerity. Trust enables deeper cooperation, making food systems more resilient - food businesses that win, have farmers that win.



“Sincerity in our actions has got to be really key to this. We need to really learn how to trust each other, and I think that's the big bit that's missing at the moment.”



Charlie Curtis, Head of Agriculture Sustainability

2 Collaboration is built on understanding and then action

Over 90% of big food companies' emissions come from suppliers (Scope 3). Cutting these means working with suppliers, not just collecting data. Premier Foods launched a supplier engagement programme focused on resilience. From the outset, they asked suppliers to share risks, resilience plans and the support they need. It is a simple, focused model built into ESG tracking. It drives progress and strengthens relationships.

“Does it grow corn? Ultimately we need to be doing things that actually grow the corn. So action is very much where I'm at.”



Chris Manley, Traction & Farmer Advisory Board



3 Get Farmers Involved from the Start

A future fit supply chain will be relationship first, not transaction first. Change from the ground up is already happening - farmers are innovating and collaborating. Bring farmers into strategic decision-making from day one. Look for scalable models, shared learning and farmer-led networks to inform decision making and planning. When farmers help shape solutions, outcomes are more practical, scalable and rooted in real-world context.



“We need all land to be doing more than one thing - multifunctional land needs to be supported by the supply chains.”



David Edwards, Deputy Chief Executive Officer

4 Diversify to Build Resilience

Future uncertainty is guaranteed. Our food system relies too heavily on monocultures and narrowly efficient supply chains. As land becomes scarcer and risks rise, we must diversify what and how we grow. Support multifunctional farming - like growing oats and beans together - and supply chains that reward diversity over efficiency. Partner with smaller, agile networks already testing new models. To meet climate, food and biodiversity goals, every acre must deliver multiple benefits. This diversification builds resilience and maximises limited resources.

“People often associate procurement with cost, but ultimately our biggest and number one prerogative is supply and resilience.”



Gareth Pullan, Director of Procurement



WHAT YOU CAN DO NEXT

5 COMMERCIAL MOVES TO MAKE AN IMPACT

1

Trust over transactions

Are your farmer partnerships built on mutual trust or short-term deals? Make trust your operating model. Follow through on promises and invest in long-term relationships.

2

Engage beyond emissions

Are you only asking suppliers what they emit, or also what they need? Ask for risk plans, support needs and resilience priorities. Build this into ESG frameworks.

3

Co-design, don't cascade

Are farmers shaping your strategy or reacting to it? Bring them in early. Build together. Ground your plans in real delivery.

4

Back diversity over efficiency

Are you rewarding scalable innovation or reinforcing monocultures? Diversify crops, practices and partners. Resilience depends on it.

5

Turn insight into action

Ready to build a future-fit supply chain? Bring in Veris to combine strategic vision, practical delivery and industry-leading intelligence.

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RESPONSES FROM 50 INDUSTRY LEADERS INCLUDING ABEL & COLE, GREGGS, QUORN FOODS, COOP, LEPRINO FOODS & ARLA

MAJORITY OF INDUSTRY IS READY TO MAKE PROGRESS BUT THERE IS A LOT TO DO

ATTENDEES WERE ASKED:

"What is the biggest structural change needed to create a future-fit supply chain?"

What the data shows:

- **54% cited stronger supplier collaboration** as the biggest structural change needed - highlighting the importance of trust, transparency and long-term partnerships.
- **24% called for more regenerative and circular practices**, indicating a clear appetite for designing waste and emissions out of the system.
- **10% pointed to localised or regional sourcing as a strategic priority.** A smaller number identified the need for digitisation and automation or offered alternative views which we are exploring.

INSIGHT:

The data shows that food leaders view trust-based, long-term supplier partnerships as the most urgent structural shift. This is about more than communication. It's about co-owning risk, aligning around shared sustainability goals, and building resilience together.

At the same time, nearly one in four participants are pushing for regenerative and circular models. This signals a shift in mindset – from efficiency and control to redesign and reciprocity.

To move faster, businesses must break down silos. That means connecting procurement, sustainability and operations around a shared strategy – and redefining value beyond short-term cost.

SUPPLY CHAIN: STRATEGIC DRIVER OR OPERATIONAL RISK?

ATTENDEES WERE ASKED:

"In your view, is the supply chain a driver of competitive advantage or a risk to manage?"

What the data shows:

- **56%** said both equally - recognising the dual nature of supply chains as both opportunity and exposure.
- **32%** view the supply chain primarily as a driver of competitive advantage, highlighting its role in value creation, differentiation and resilience.
- **12%** see it as primarily a risk to manage, indicating more defensive or compliance-led thinking.
- Just one respondent was not sure.

INSIGHT:

The data signals a mindset shift. Supply chains are no longer viewed purely as operational infrastructure, but increasingly as strategic assets for growth, resilience and differentiation.

However, the majority view of supply chains as both opportunity and risk reflects a tension. Many businesses remain stuck in short-term risk management cycles, rather than unlocking long-term value through strategic investment.

Realising the full potential of the supply chain will require tighter cross-functional alignment – particularly between procurement, sustainability, finance and strategy – and a clearer definition of the supply chain's role in driving business performance, innovation and brand trust.

SUPPLY CHAIN FUTURE-READINESS: PROGRESS OR PLATEAU?

ATTENDEES WERE ASKED:

"How future-ready do you believe your supply chain is today?"

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What the data shows:

- **38%** said their supply chain is somewhat ready – signalling progress, but not yet transformation.
- **25%** described themselves as neutral – still in early stages of direction-setting and capability building.
- **25%** said they are not very ready, acknowledging that significant development is still needed.
- **13%** admitted they are not ready at all, pointing to major transformation still required.

INSIGHT:

The results reflect a sector in transition – moving toward future-readiness, but not yet at the pace or scale required.

While many acknowledge progress, a combined 63% still view their supply chains as either neutral or unprepared. This gap points to common challenges: complexity, limited capacity, and lack of internal alignment.

The path forward lies in shifting from siloed initiatives to enterprise-wide change. That means embedding resilience into core supply strategies, improving data visibility, and building supplier partnerships that are agile enough to respond to disruption and deliver shared value.

"I'm constantly balancing cost, risk and impact - but it's rare to have open conversations with peers and farmers in the same room. I left with fresh perspective, clearer priorities, and a reminder that real resilience starts with trusted, long-term partnerships."

Head of Procurement from the FFM network

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