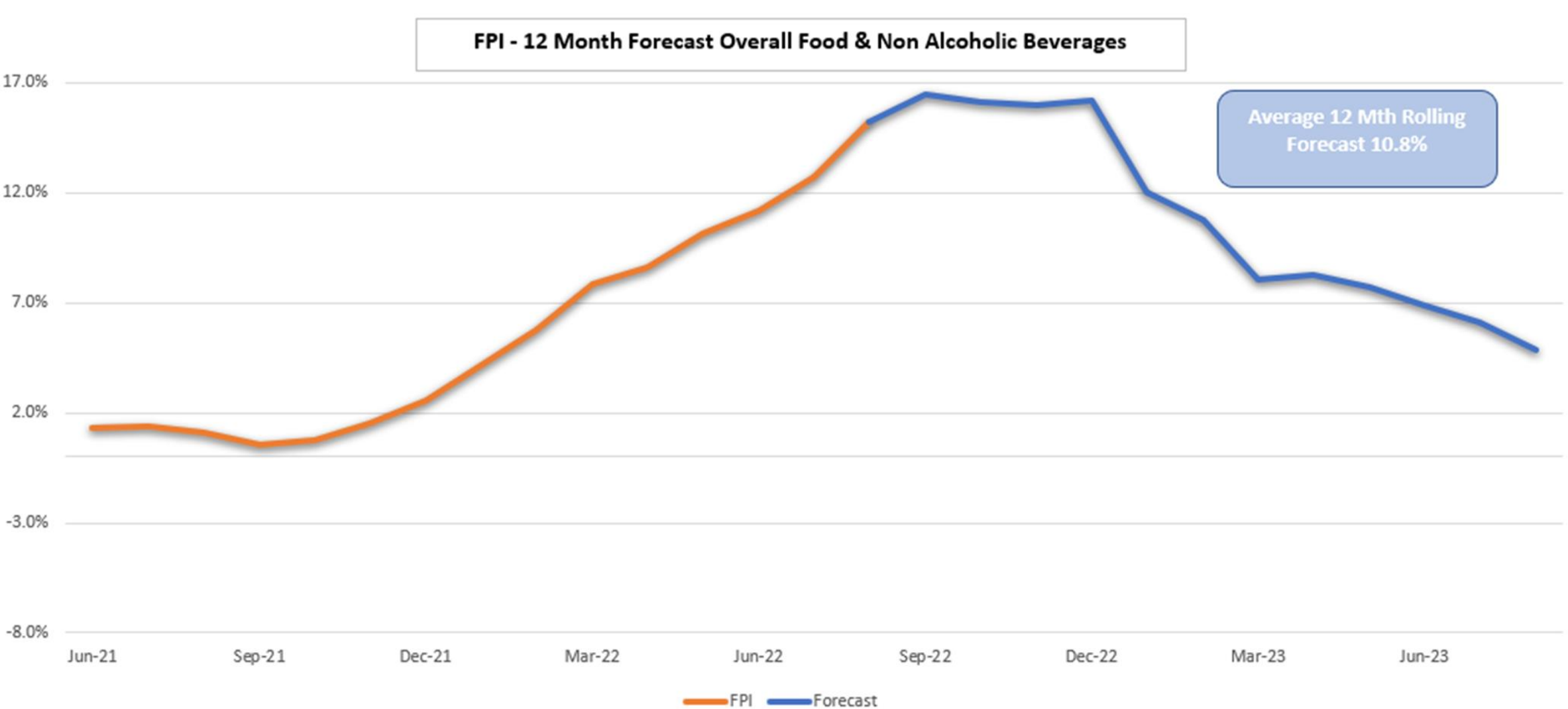




FOOD SYSTEM CRISIS
What does it mean for
equipment in the
Hospitality sector?
A HIGH LEVEL VIEW



COST



THREE INTERCONNECTED THEMES DRIVING MAJOR CHANGE



Biodiversity, Carbon, Localisation and Nature



Health, Disease, Obesity, Hunger



Geo-Politics, Trade, Labour and Protectionism

WE ARE SHRINKING BIODIVERSITY

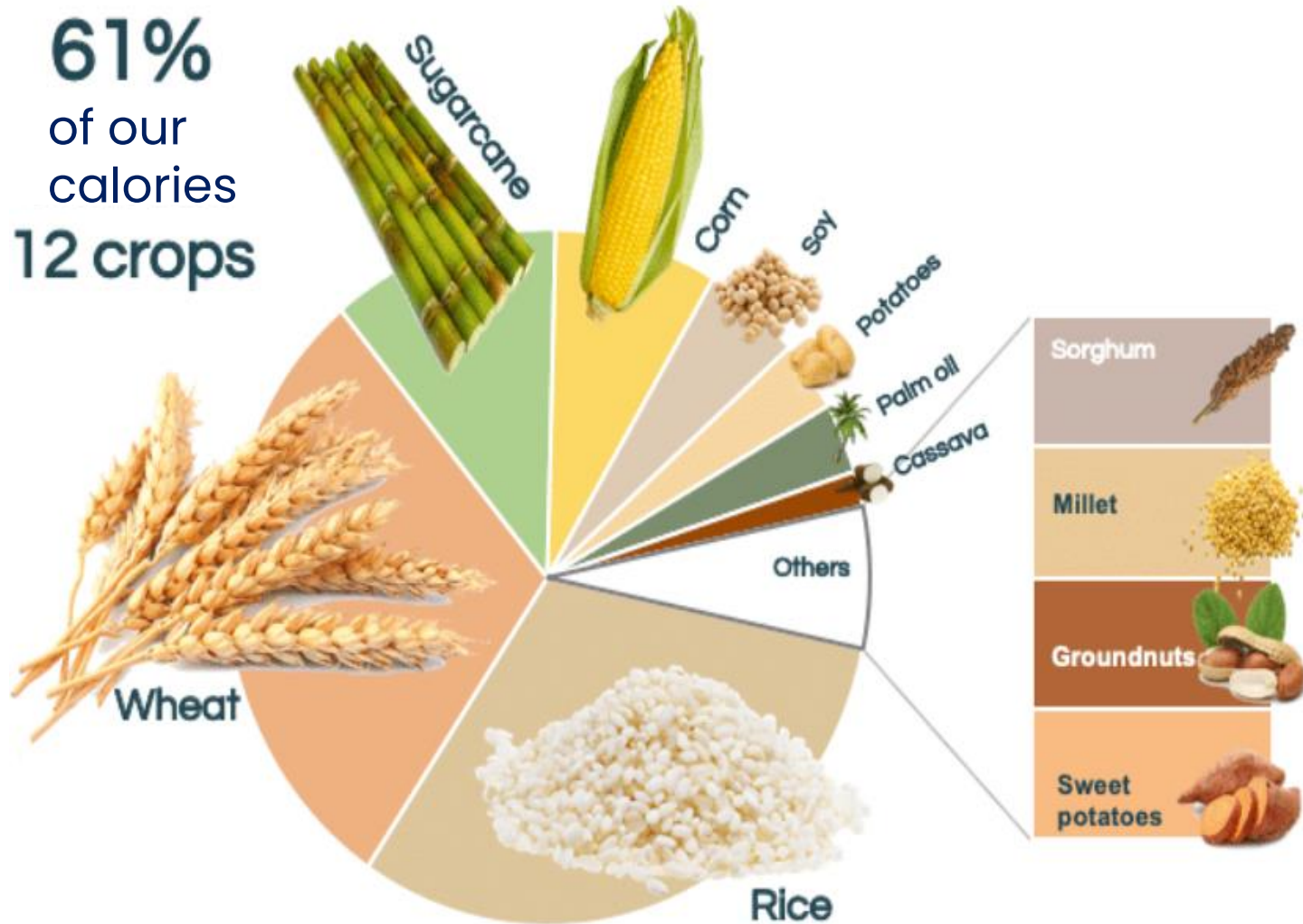
75% of our calories now come from just 12 crops and 5 animals, leading to:

- reduced diversity in our nutrition
- crops (and animals) that are vulnerable to climate volatility, pests, and diseases
- demolition of alternative species
- farmers with limited choices of crops to grow

Over 300,000 plants are potentially fit for consumption

GLOBAL CALORIE SOURCES (UN FAO)

61%
of our
calories
12 crops

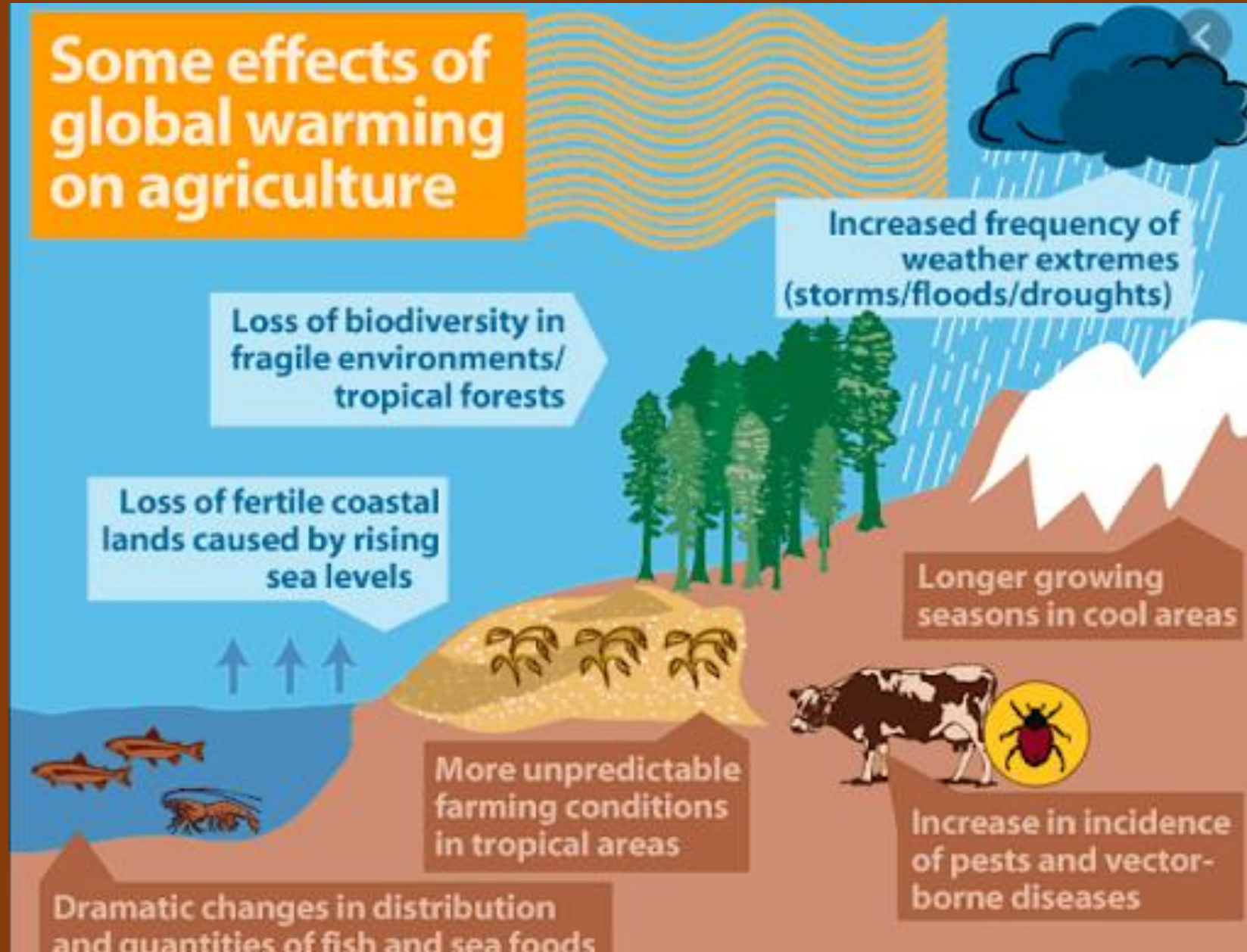


The remaining

14%
come from
5 animals



CLIMATE CHANGE PRODUCTION IMPACT



THREE INTERCONNECTED THEMES DRIVING MAJOR CHANGE



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DOMINANCE OF PROCESSED FOODS

	NATURAL	PROCESSED	ULTRA-PROCESSED
TOMATOES	 INGREDIENTS 1	 INGREDIENTS 11	 INGREDIENTS 26
RASPBERRIES	 1	 6	 25
CHICKEN	 1	 10	 16

DISEASE AND PESTS INCREASING

The spread of highly pathogenic avian influenza, commonly called bird flu, has raised concern among governments and the poultry industry after previous outbreaks led to the culling of tens of millions of birds and trade restrictions.



Notoriously difficult to control, the Banana Wilt decimated global plantations of the Gros Michel banana in the 1950s/60s, which had dominated the commercial industry until its downfall. Its replacement, the modern Cavendish has been threatened with a strain of the disease known as TR4 since the 1990s; in 2019 TR4 made its first appearance in the Americas.



OBESITY & HUNGER



THREE INTERCONNECTED THEMES DRIVING MAJOR CHANGE



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CONFLICT



TRADE/LABOUR



SECURITY



THE CHANGING ROLE OF THE HOSPITALITY KITCHEN



1922

FOOD SUPPLY CHAIN

2022

MANUFACTURER



1

INTO-PORT
DISTRIBUTION



2

SHIPPING



3

IMPORTING



4

INBOUND
TO NDC



5

NDC



6

DEPOT
DISTRIBUTION



7

DEPOTS



8

STORE
DELIVERY



9

KITCHEN



RISING CONSUMER DEMANDS

PRESTIGE
PURCHASING

CONVENIENT

FRESH

HEALTHY

TASTY

SUSTAINABLE



MY KITCHEN NEEDS PREDICTIONS

MORE	LESS
Supply Chain Value-Add	Labour
Frozen Product	Energy Intensity
Scratch Cooking	Menu items & Ingredients
Fresh Local Sourcing	National Sourcing
Robotics/AI/Tech	Food Waste