

# Building Our Food Future

How 10 Global Visionaries Are  
Transforming Food Systems  
Through Healthy & Sustainable Diets



## About Us

Planeatry Alliance bridges the gap between organisations, sustainability and health to drive transformative change in food systems. We work across the value chain to deliver measurable outcomes that align human and planetary health with commercial resilience.

Our vision is a food system that radically reduces its environmental and health footprints - cutting emissions while nourishing biodiversity, ecosystems, and human wellbeing. We believe everyone has a role in creating a better food future - from businesses and citizens to policymakers - and we focus our efforts on systemic transformation, rather than single-issue solutions.

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## Executive Summary

### Our global food system faces an existential crisis.

This whitepaper – ‘Building Our Food Future: How 10 Global Visionaries Are Transforming Food Systems Through Healthy and Sustainable Diets’ – sets out strategic opportunities for businesses and policymakers to act at the intersection of human and planetary health.

It highlights the transformative potential of healthy, sustainable diets and how they show up in everyday basket and meal choices.

‘The food system is a kind of paradoxical story, isn’t it? On the one hand, it looks just fine. We’ve got more choice, we’ve got more opportunity, we’ve got more availability than ever in human history. And yet at the same time, we’re seeing a growing burden on people, on the planet, on the public purse as a result of the way the food system has become commodified, consolidated and financialised.’

Sue Pritchard, CEO, The Food Farming & Countryside Commission



### Why Current Approaches Are Falling Short

The numbers are stark: our food systems generate one-third of global greenhouse gas emissions (GHGe<sup>1</sup>) while poor diets have surpassed smoking as a leading cause of preventable deaths<sup>2</sup>, costing the UK alone £67.5 billion annually in healthcare costs<sup>3</sup>. Despite overwhelming evidence that healthier diets are also more sustainable, fewer than 1% of UK consumers meet basic healthy dietary recommendations<sup>4,5</sup>.

These burdens, on society and the planet, are simply unsustainable. Over the last decade many corporate and policy initiatives have been launched to tackle these challenges. These current approaches tend to be:

- **Tactical rather than transformational:** Most food companies still treat sustainability and nutrition as a reputational issue to manage rather than a fundamental business necessity and commercial opportunity.
- **Fragmented and uncoordinated:** Multiple players pursue their own individual activities that rarely create collective impact across shared value chains.
- **Supply-focused rather than demand-led:** Interventions concentrate on production practices rather than reshaping consumption patterns via the basket level.
- **Abstract rather than tangible:** The narrative employs concepts like ‘carbon reduction’ or ‘high fat salt sugar’ that fail to resonate with those making everyday decisions throughout the food system.
- **Pursued by the few not the many:** Activities to improve human and planetary health outcomes tend to be planned and implemented by small specialist teams and pursued by a passionate niche of consumers.



## Whether you're a business leader seeking competitive advantage, a policymaker designing effective regulation, or a campaigner driving systemic change, these patterns limit our collective impact.

Drawing on our combined 50+ years leading sustainability transformation in business, working on global food policy and building cross-sector partnerships, we know that practical solutions to these challenges already exist but usually in silos and not at scale. What's missing are the pathways for turning this potential into day-to-day reality for billions of people and the commercial and policy entities that serve them, while respecting the needs of farmers, communities, and citizens.

### Learning from Leaders at the Sharp Edge

Over the past five months, we've conducted in-depth interviews with ten leaders driving food systems change across business, policy, and civil society - visionaries working at the sharp edge of transformation and actively reorientating food systems for the wellbeing of people and planet. 'Building Our Food Future' distills their insights into opportunities for action that can make healthy, sustainable diets a new norm - and reveals 10 actionable pathways to accelerate this transition.

### The Solution: Basket-Level Transformation

Diets that protect the planet also promote human wellbeing<sup>6,7,8</sup>. Yet today, these two crucial aspects of a better food system are often run separately by many food companies. By integrating them into one approach - a healthy and sustainable diet - we create a mutually reinforcing narrative for both people working within the food system and people consuming food.

Our research reveals that basket-level transformation - reshaping the mix of products businesses produce, source, promote, drives consumer shifts toward healthier, more sustainable diets - is a solution for systemic change. Crucially, basket-level opportunities bring together the wellbeing of people and planet in ways that are mutually beneficial and reinforcing.

We have heard that in a world of complexity, making healthy and sustainable choices the default at an individual product level is simply too complex. We all just get lost in the weeds. By taking a whole basket (and meal) approach we can cut through this complexity and help organisations make better decisions across the totality of food choices each day, each week, each year. Practical solutions exist to enable this basket-centred approach, but currently these solutions are applied in isolation from each other. By applying them in tandem we will break through the inertia of 'business as usual'.

We've distilled 10 integrated pathways that work as a reinforcing ecosystem - organised around three strategic levels: **building foundations** (business cases, data systems, capabilities), **reshaping day-to-day execution** (product strategies, food environments, digital platforms), and **enabling system transformation** (portfolio evolution, policy frameworks, cross-sector collaboration).

The convergence of health and sustainability through a basket led approach represents a once-in-a-generation opportunity to reshape the future of food. The question is not whether to act, but how to deliver healthy sustainable diets at scale and pace through coordinated action across all stakeholders. The solutions exist. The only questions that remain are how quickly we can turn this convergence into the new reality for the food system and what role each stakeholder has to play.



## Part One: The transformative potential of healthy, sustainable diets.



### The global food system stands at a critical inflection point.

Scientific evidence has established that diets better for planetary health are also better for human health<sup>9,10,11</sup>. But we face a fundamental challenge – not of knowledge, but of action.

**If we do not find a fundamentally better approach to how we feed the world, we run the risk of undermining business competitiveness, diminishing pathways for growth, inflating cost bases, reducing resilience, and losing the trust of customers, food producers, investors, policymakers, and stakeholders.**

Our food systems generate around one-third of global GHGe, while driving water pollution, biodiversity and nature loss<sup>12,13,14</sup>. Ironically, in our efforts to feed ourselves, we are destroying our own health, overwhelming healthcare systems, and undermining the very ecological foundations that food production depends upon<sup>15</sup>.

**‘A healthy, sustainable and truly just food system is about real freedom, freedom from junk diets, freedom from climate chaos, freedom from injustice. It’s a system that breaks the grip of vested interest, and delivers the world we want.’**

Dr. Gunhild Anker Stordalen, co-founder & executive chair, EAT



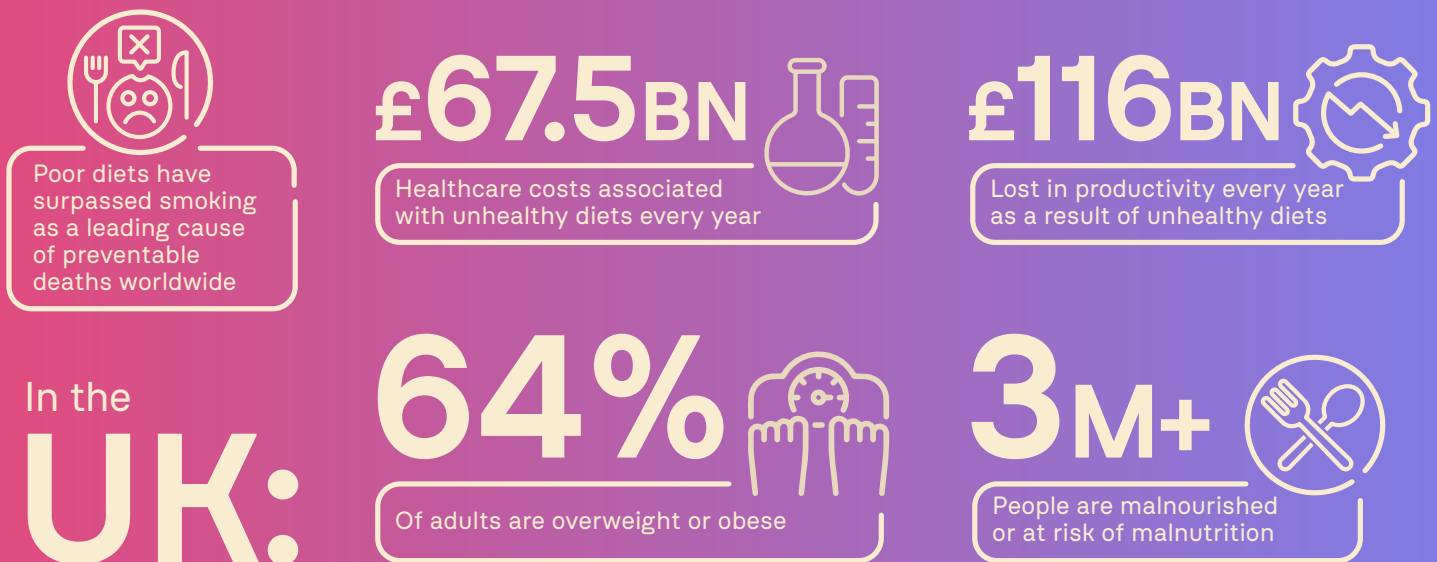


Diagram: Impact of unhealthy diets

**This isn't yet another sustainability or human health challenge. It's an existential business imperative that demands immediate attention and strategic response.**

## The Opportunity

This situation is not inevitable. Shifting diets can prevent up to 24% of unnecessary deaths globally while bringing co-benefits for climate and nature<sup>16</sup>. The International Panel on Climate Change (IPCC) confirms dietary change can deliver 'gigatonne scale' emissions reductions, making healthy sustainable diets a critical pathway to a thriving food system<sup>17,18</sup>.

A healthy sustainable diet promotes health and well-being, has low environmental impact, and is accessible, affordable, safe, equitable, and culturally acceptable<sup>19</sup>. The Eat Lancet Commission defines this as a plant-rich diet where whole grains, fruits, vegetables, nuts and legumes comprise a greater proportion of foods consumed, with modest amounts of animal proteins<sup>20</sup>.

Yet we're nowhere near where we need to be - fewer than 1% of people in the UK currently meet basic healthy dietary recommendations<sup>21</sup>, let alone diets with more comprehensive sustainability criteria<sup>22,23,24</sup>. The average UK diet produces 4.84kg of CO<sub>2</sub>e per person every day, far exceeding IPCC emissions targets of 2.04kg<sup>25</sup>. The gap between

what the science tells us we need to eat and what's actually on our plates shows just how far we still have to go<sup>26,27</sup>.

**The good news** is forward-thinking businesses and policy makers are recognising that whole basket transformation represents an underutilised commercial lever in the net zero and health transition. While supply-chain interventions create the foundations for decarbonisation, its consumption-side change that helps us accelerate impact<sup>28</sup>.

Organisations that successfully integrate health and sustainability unlock a reinforcing cycle - one that can deliver commercial advantage while driving the emissions reductions and health gains needed to meet 2050 targets<sup>29,30</sup>.



## Part Two:

### If the case is so compelling, why hasn't it happened yet?



Our conversations with ten food system leaders showed us what's holding us back.

**'We need to acknowledge that we're operating in a system that is designed to perpetuate the status quo right now. And if we don't start by acknowledging that, then we're not really giving ourselves a chance to actually rewire it.'**

Anna Turrell, global sustainability leader



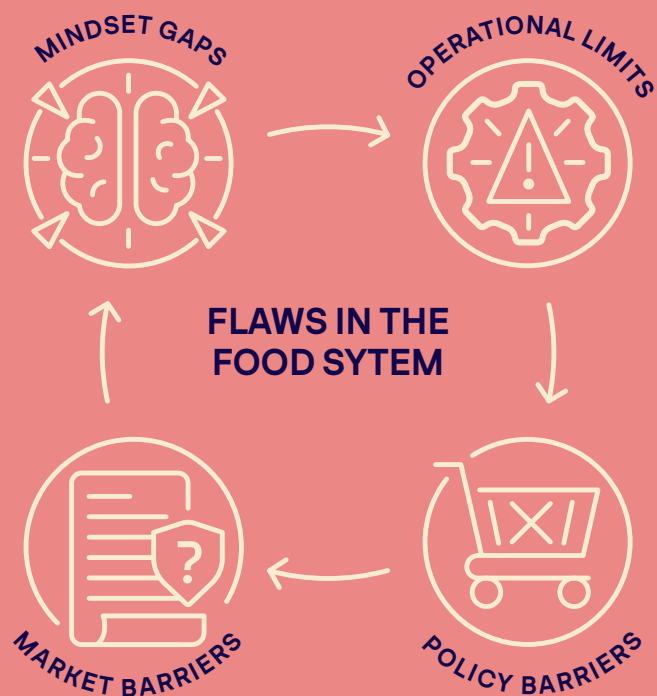
The barriers we heard about point to fundamental flaws in the architecture of our food system - from C-suite mindsets locked in short-term thinking, to fragmented policy frameworks and market dynamics that actively work against better basket provision. Together, these forces uphold an unsustainable status quo.

**'Progress is flickering into view, but political inertia and billions in sunk cost keep the old food system on life-support. Subsidies still prop up the status quo, and marketing muscle keeps it glossy.'**

Dr. Gunhild Anker Stordalen, co-founder & executive chair, EAT







A pattern of 15 key barriers across four areas emerged, as interconnected forces creating powerful resistance to change. These barriers span corporate cultures, commercial imperatives, consumer behaviours, and regulatory environments. Overcoming them requires not just addressing each in isolation, but fundamentally rethinking how the entire system operates.

## MINDSET AND APPROACH GAPS

**Barrier 1: Iterative rather than transformational thinking.** Most food businesses still approach sustainability and health issues as reputational issues to be managed in the here and now rather than recognising them as a transformational necessity for future relevance, growth, and resilience. This incremental mindset means companies tinker at the edges rather than embrace the scale of change required.

**‘I think the problem is that there is a vast gap between the evidence of what needs to change and the ambition of the levers and preparedness to change.’**

Tim Lang, emeritus professor of food policy, City St George’s, University of London



**‘You can’t change a structural problem by asking people to shop differently on a busy Friday evening...’**

Sue Pritchard, chief executive, The Food Farming and Countryside Commission



**Barrier 2: Abstract metrics over tangible products.** The overwhelming narrative around ‘carbon footprints’, ‘nature restoration’ and ‘improved health’ remains meaningless to most people working in food value chains.

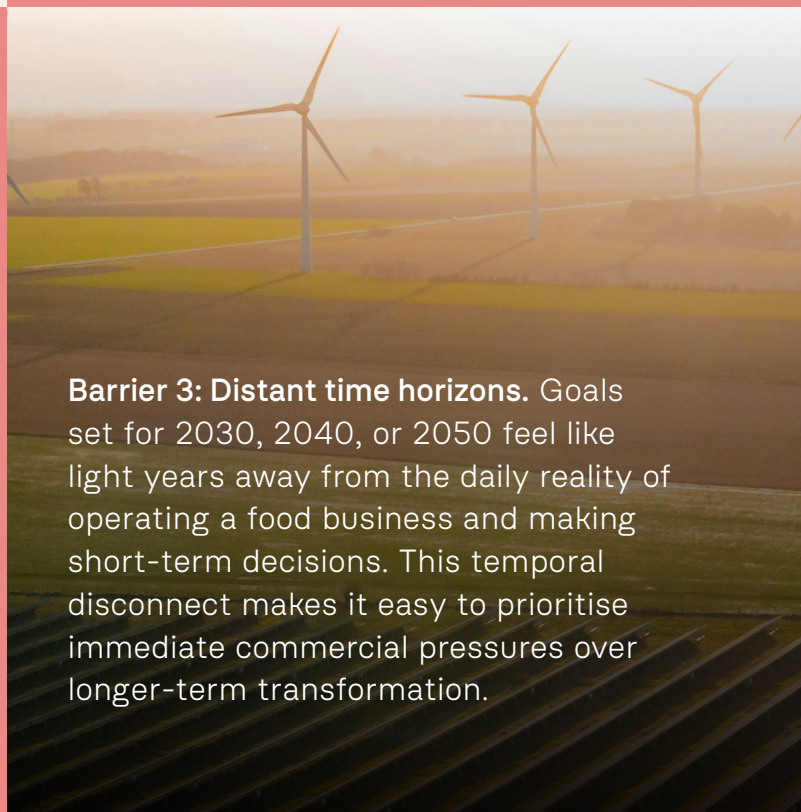


**‘We have massively overcomplicated the food transformation. Through our hundreds of detailed sustainability targets, through our myriad of reporting standards. We lack a single, commercially relevant, galvanising North Star to collectively reach for.’**

Anna Turrell, global sustainability leader

**‘We need to speak a business language. Our colleagues talk about products, we talk about carbon. We need to build a bridge between the two narratives.’**

Anna Turrell, global sustainability leader



**Barrier 3: Distant time horizons.** Goals set for 2030, 2040, or 2050 feel like light years away from the daily reality of operating a food business and making short-term decisions. This temporal disconnect makes it easy to prioritise immediate commercial pressures over longer-term transformation.

**Barrier 4: Uncertain destination.** Unlike the automotive industry's (relatively) clear pathway from combustion engines to electric vehicles, food system transformation lacks a single, simple end-state. Multiple simultaneous changes across production, processing, marketing, availability and consumption are needed, which makes it harder to galvanise coordinated action.

**‘If we want a systemic shift in the British food system, we’ve got to reframe what we want from it. And I believe that our future macro goal has to be based on the premise that prevention is better than cure for our climate and our health.’**



Tim Lang, emeritus professor of food policy, City St George's, University of London

## OPERATIONAL AND STRUCTURAL LIMITS

**Barrier 5: Technical rather than commercial ownership.** Most businesses either lack the technical experts needed to drive healthy sustainable diet transformation, or, more often, these specialists remain disconnected from core commercial functions. This means the people making daily business decisions are often disengaged from the transformation efforts that only they can implement at scale.



**‘Historically, sustainability functions have developed and grown up inside organisations as almost separate little islands. They have been the guardians of truth, or the ones that hold the mirror up and bring the outside in. But we know very clearly that we cannot deliver transformative change on our own. And the most effective sustainability leaders and teams are those that integrate sustainability strategies right across the organisation.’**

Anna Turrell, global sustainability leader

**‘It is vital that companies are measuring the right things and discussing that data in the right commercial conversations that need to be happening right up to the Board level. It’s not enough that a food company has an ESG report it must be acting through the products it sells.’**

Anna Taylor, executive director, The Food Foundation



**Barrier 6: Disordered Data.** The food system's vast scale requires sophisticated digital solutions to measure, manage and improve performance. Yet much of the sector still relies on highly inefficient and inaccurate manual tracking of data. We have to spend the time to understand:

- What information and data do we need?
- Where across the food system can we find it?
- Who owns the data?

- What do we want that data to be used for?
- How does it drive change?

But we cannot currently answer any of these questions consistently.

**‘Hyper detailed digital information gathering, sharing and use will be transformative in how we unlock this shift within the food system.’**

Anna Turrell, global sustainability leader

**Barrier 7: Supply-side focus.** Most interventions target production practices on farms, in fisheries, and inside factories – operations that feel distant and abstract to most consumers and many food industry employees. This focus fails to address the critical consumption-side levers that determine the food choices people make, and the business decisions that shape what's available, affordable, and appealing.



‘Demand and supply side solutions need to come hand in hand. We need incentives and support for farmers to diversify, helping to reduce livestock production. But we also need to align trade policy, and to see a shift in the average amount of meat we consume in the UK. This helps ensure UK meat and dairy production is not replaced by imports, quite possibly produced to lower standards than the UK’s.’

Sandra Bogelein, lead analyst for people and net zero, Climate

**Barrier 8: Constant crisis management.** The food sector has always had to 'fight fires,' but recent years have brought unprecedented challenges – the pandemic, soaring energy costs from the Ukraine conflict, extreme weather events, and changing farm subsidy schemes. The sector is exhausted, with little capacity to think, let alone act, big or bold.

‘Having spent over 30 years in food retailing, other than 2008 where we faced a combination of the global financial crisis and a really poor wheat harvest, I can’t remember another major jolt to food supply in this country pre-covid, and then we experienced the pandemic followed by Brexit impacts, energy cost crises, inflation, cost-of-living challenges, war-driven supply interruption and weather related impacts on harvests and yields – all combining and compounding?’

Nigel Murray, managing director Booths and Defra Food & Drink



Despite the food system being existentially important and facing cascading shocks it feels like it remains ill prepared to deal with further, even more consequential shocks.

‘The work I led with the National Preparedness Commission shows that the UK food system is not prepared for the type of shocks – social, environmental and economic – it’s likely to see in the next decade’

Tim Lang, emeritus professor of food policy, City St George’s, University of London



## MARKET AND CONSUMER BARRIERS

### Barrier 9: Marketplace environments

**undermine better choices.** Food environments – both physical and digital – play a powerful role in shaping what people buy and eat<sup>31</sup>. Yet in most of the out of home sector, supermarkets and online platforms, the way products are priced, promoted, and positioned actively steers people towards options that are less healthy and sustainable<sup>32</sup>. Until these commercial levers are aligned with public health and environmental goals, progress will remain limited.

**‘The biggest barrier to change which we are, I think, gradually overcoming is around the recognition of the importance of the holistic food environment in shaping people’s diets. If you want people to take more personal responsibility, you have to give them more agency, and by doing so you create environments which allow them to exercise that agency rather than shut it down’.**

Anna Taylor, executive director, The Food Foundation

**‘Today’s food systems hide a price tag the planet can’t pay - USD 15 trillion a year in health and social damage according to the Food System Economics Commission<sup>33</sup>. That’s more than the total value creation of the industry itself. Seventy percent of that bill is poor health. When true costs are invisible, bad models get a free pass.’**

Dr. Gunhild Anker Stordalen, co-founder and executive chair, EAT

### Barrier 10: Perceived consumer trade-offs.

Whether real or perceived, many consumers and businesses see sustainable, healthy options as more expensive, less tasty, inconvenient, and failing to respect long established eating cultures. This fuels resistance to change, while the true costs of unhealthy, unsustainable food choices remain hidden from market prices. In a cost-of-living crisis, this artificial price advantage for less sustainable options becomes even more problematic.

**Barrier 11: Signal lost in the noise.** Consumers are bombarded with conflicting messages – nutrition claims, product labels, influencer endorsements, certifications, greenwash, and counter-claims – most of which operate at the individual product level. This overwhelming information landscape creates confusion, erodes trust, and ultimately leads to decision fatigue, so customers stick with the status quo.

**‘What we have learned over the years is how important it is to make communication about quite complex topics, such as sustainable dietary change, as easy and as engaging as possible.’**

Caroline Orfila Jenkins, vice president of science and technology, Oatly

## POLICY AND GOVERNANCE BARRIERS

**Barrier 12: Institutional frameworks not fit for purpose.** The UK has one of the most centralised decision-making systems among Western democracies. When it comes to food, that centralisation becomes a bottleneck: the scale and complexity of the food system means it competes with every other major issue at the doors of government. There is little coordination between health, environment, education, trade, and treasury.



**‘There needs to be a reform of institutions at a State level. I looked at the UK’s National Risk Register, which has precisely one food risk out of 89, and the word food comes up, I think, five times. Defra doesn’t connect as it should with the Department of Health and Social Care; or Science and Technology; or Trade. And we’ve got to decentralise delivery more to regions and cities across the UK, including England, to build resilience.’**

Tim Lang, emeritus professor of food policy, City St George’s, University of London

**Barrier 13: Lack of a strategic enabling policy framework.** A highly competitive, low-margin sector dealing with multiple short-term pressures needs a well-coordinated, long-term policy framework. Instead, food businesses face a patchwork of contradictory and frequently changing regulations that lack ambition and fail to create the certainty needed for transformative investment.

**‘Arguably, the food system is the most important system on the planet. Governments need to set both ambition and the guardrails for the pace and scale of change that’s needed. Why on earth don’t we have stronger regulations for kids’ food? Why on earth don’t we have higher standards with the government using its own money – that it’s spending anyway – to procure better food for the public plate?’**

Sue Pritchard, chief executive, The Food Farming and Countryside Commission



**Barrier 14: Voluntary Initiatives failing to deliver.** Food businesses and policymakers have set numerous voluntary commitments to reduce their health and environmental footprints, but these are often fragmented and lack collective momentum. Even when sector-wide partnerships are created, they consistently fail to achieve universal participation, leaving leading companies competitively disadvantaged by carrying the costs of transformation while laggards benefit from inaction without consequence.

This imbalance is further fuelled by lobbying efforts of some industry groups to weaken or delay the very policies needed to level the playing field, even when more progressive businesses publicly support them.

**‘We recently supported work by Feedback to assess the progress being made by the UK supermarkets on the 600 social and environmental commitments they have made in the last decade. Their report found that their approach was inconsistent in ambition, scope and delivery. Only proper regulation can drive the whole sector change we need.’**

Anna Taylor, executive director, The Food FoundationChange Committee

**Barrier 15: The missing voices of small businesses.** The system that brings produce to our homes, our restaurants and our schools and workplaces is global and sprawling; yet food is deeply local, rooted in place, shaped by regional landscapes, cultures, and inequalities. A one-size-fits-all approach imposed from the centre will never be enough to deliver the transformation we need. What’s missing is a joined-up, place-based strategy, supported by national ambition but delivered through local innovation and leadership.

**‘We need to bring many more voices to the table on the future of the food system. This cannot just be a conversation in a closed room between Big Government and Big Business. We need to be engaging farmers and their communities. People living on tight budgets. Voices that some may say are ‘hard to reach’ - but they are not if you are willing to go to where they are.’**

Sue Pritchard, chief executive, The Food Farming and Countryside Commission



## Part Three: How do we make healthy, sustainable diets a reality?



The barriers are formidable, but not insurmountable. Our interviewees shared practical ways their organisations are turning the science of healthy and sustainable diets into action.

A common thread centres on the ‘basket level’ - the mix of products that businesses choose to produce, source, promote, and price. The basket represents both a delivery mechanism for dietary transformation and a practical pathway to translate ab-

stract goals like ‘carbon reduction’ into real meals.

Our interviewees identified 10 integrated solutions that work as a reinforcing system. Each solution strengthens the others, creating momentum that individual actions can’t achieve. The healthy sustainable basket serves as the delivery mechanism that brings these solutions together, turning abstract goals into real dietary transformation.

### 10 solutions across three areas



#### BUILDING THE FOUNDATIONS

Three foundational shifts underpin any successful transformation: a clear and compelling business case for change, digital tools and data infrastructure to support better decision making, and the widespread adoption of new skills and capabilities.



#### DAY-TO-DAY EXECUTION

This is where practical steps are being taken to deliver a healthy sustainable diet. These include better translating the language of healthy sustainable diets into day-to-day language across products and categories, having a whole diet/basket mindset, and reshaping food environments.



## ENABLING SYSTEM CHANGE

Leading organisations are driving structural shifts beyond their own boundaries: advocating for coherent, long-term policy frameworks aligned with healthy sustainable diet outcomes and supporting industry-wide transformation toward more sustainable, health-aligned baskets.

## BUILDING THE FOUNDATIONS

### Solution 1: Creating the value case

Leading organisations are building compelling, comprehensive value cases that go beyond environmental and societal benefits to articulate the commercial imperative for action. Forward-thinking companies are implementing this across short, medium and long term.

**Short term:** building resilience against climate risks. The UK food industry is facing additional costs of £160m due to climate risks within the next five years<sup>34,35</sup>. By 2025, EU agriculture is predicted to face €90 billion in drought-related losses per annum, much of it uninsured<sup>36</sup>. Significant future risks to UK food production include heat stress to livestock, drought affecting crop yields, pests and pathogens, and increased soil erosion risks<sup>37</sup>. Companies are recognising that shifting consumer diets toward less climate-exposed foods – including plant proteins and resilient crop varieties – reduces operational vulnerability and system-wide exposure to climate shocks.

**‘I think this is where (smaller) scale is our friend, particularly from a food resilience perspective, and also from a quality perspective as well, because our supply chain is simply more agile, less prone to failure.’**

Nigel Murray, managing director of Booths and Defra Food & Drink Sector Council member



**‘As a scientist, I know trials might not always work out or might give the required yield or the quality. So we take the risk out of the equation and we commit to buying the oats from the [regenerative agriculture] trials.’**

Caroline Orfila Jenkins, vice president of science and technology, Oatly



**Medium term:** respond to consumer shifts. Organisations with basket-level targets - such as healthy sales goals or a plant-animal protein split target - show how health and sustainability go hand in hand across the mix of foods sold. Two-thirds (66%) of consumers are already changing their diets or considering making changes to be healthier and more sustainable<sup>38</sup>. Younger generations are accelerating this shift, asking tougher questions and demanding better answers from both industry and the wider food system.

**‘Our customers care about health, they are interested in it. They’re reading the back of pack. They’re mostly really engaged. Again, there’s a business case to being a healthy retailer, to be helping our customers make better choices.’**

Alice Ritchie, head of healthy & sustainable Diets, Tesco



**‘The plant-animal protein split is a really important one, businesses are getting on and doing it themselves, and are recognising the value of the shift.’**

Anna Taylor, executive director, The Food Foundation

**‘A trend that’s really important to recognise is the generational shift. We see this now, with younger generations now coming through that are asking much more thoughtful questions and demanding much more comprehensive answers of the food industry and of the system at large. I think that is probably going to be one of the most powerful forces in helping us to drive this shift.’**

Anna Turrell, global sustainability leader





**Long term:** regulation, liability and securing finance. Forward-thinking businesses are actively calling for regulatory frameworks that create level playing fields<sup>39</sup>. Companies proactively adopting healthier, more sustainable diets will be better positioned when inevitable regulatory intervention arrives.

**‘At Ahold Delhaize, our Health & Sustainability team sets the direction and supports category teams in understanding the impact of the levers they can use to encourage healthier choices. This capability-building enables effective activation - through strategies like expanding plant-based options, offering incentives, improving labelling and placement, and partnering on education. In practice, this ranges from in-store dietitians to discounts on healthier categories. Change must be gradual and relevant to the local market, supported by storytelling to build trust and lasting impact.’**

Daniella Vega, global senior vice president health & sustainability, Ahold Delhaize



**‘There’s a really strong business case for nature. For example, if we’re relying on fresh water to have sustainable supply and profitable supply chain we need to be making sure that we’re not impacting water catchments.’**

Alice Ritchie, head of healthy & sustainable diets, Tesco





## Solution 2: Leveraging data and digital technologies

The food system's vast scale and complexity demand sophisticated tech solutions. Companies are using big data, AI, digital twins, and geospatial sensing to transform billions of food and drink items across millions of forests, fields, fisheries, farms and factories.

Companies are rolling out 'digital product passports' that track environmental and nutritional metrics across supply chains at a unique product (SKU) level, using predictive technologies to optimise category planning and product development, and translating complex sustainability metrics into simple, actionable information tied to commercial KPIs.

**‘For me, traceability and how we can better standardise information and data is critical. So the work that some of the UK retailers have been doing with Mondra, for example, at a product SKU level is really really important. There is an overused but important phrase of not letting perfect be the enemy of the good. When it comes to data I cannot underscore that point enough. And I’ve got the scars to prove it. We need data right now. So let’s get it. And then figure out how we improve it over time.’**

Anna Turrell, global sustainability leader



## Solution 3: Building skills and capabilities

Business teams across all functions - not just health and sustainability specialists - are developing capabilities to influence demand-led transformation. While specialist teams continue to play a vital role, transformation is being delivered by those making day-to-day decisions understanding how their work shapes basket choices and overall dietary patterns.

Forward-looking companies are forming cross-functional teams that bring together operations, marketing, product development, procurement, nutrition, and sustainability as equal partners. For example, Compass Group worked with Foodsteps to help 4,000 chefs reformulate 90,000 recipes and introduce A–E carbon footprint labels. In pilot menus, 63% of items rated A or B for sustainability, showing how capability building can drive measurable transformation<sup>40,41</sup>.

**‘It’s not rocket science, we know as retailers what we need to do to change customer behaviour. We’ve been doing it for centuries, and on health there’s a pretty good ladder of intervention that all retailers use.’**

Daniella Vega, global senior vice president health & sustainability, Ahold Delhaize



**‘We put a huge amount of effort and resources into training people. There’s always more to do, but training people enables them to help customers make the right healthy and sustainable choices as well.’**

Nigel Murray, managing director of Booths and Defra Food & Drink Sector Council member

## DAY TO DAY EXECUTION

### Solution 4: Connecting to a product mindset

Leading organisations recognise that most people working in the food value chain develop, make and sell products - not 'carbon' or 'nutrition'. To bridge this gap, companies are translating technical goals into products, services, and consumer experiences that teams can understand and act upon.

Many are now using product-level scorecards that integrate environmental, health, and commercial performance - creating a shared language that connects healthy and sustainable diets to core business activities.

**‘We don’t assume dietary changes involve an overall reduction in consumption. Instead, we assume a shift towards lower-carbon foods and we are very clear that from a consumer perspective it needs to be tasty and affordable.’**

Sandra Bogelein, lead analyst for people and net zero, Climate Change Committee





‘For us, it’s about being present wherever people eat and drink, which drives our innovation. We’ve developed small formats for on-the-go settings like trains and hotels, and larger formats for family use or food service. It’s about offering healthy products in ways that fit seamlessly into people’s everyday lives.’

Caroline Orfila Jenkins, vice president of science and technology, Oatly

## Solution 5: Adopt a basket-first approach

Leading retailers told us how they are moving beyond individual product improvements to optimise entire baskets, recognising that consumers naturally think in terms of whole meals and shopping trips.

To support this, companies are introducing sophisticated metrics that capture how food choices combine to shape healthier, more sustainable diets.

These insights help pinpoint high-impact moments in the shopper journey. Loyalty programmes are being redesigned to actively guide better choices, supported by clear category roadmaps and milestones that make change measurable and achievable at the basket level.

‘We measure how many healthy sales result from the Basket. We see a really strong uptick in healthy sales and as an internal policy it’s been really useful to have quite clear criteria of what can be included and what’s not. The key is to be appealing and tasty and inspiring. That’s been the big focus of both our internal product development team, and then also our supply base.’

Alice Ritchie, head of healthy & sustainable diets, Tesco







**‘Real change in food systems isn’t about ticking boxes. Companies need to set bold, integrated targets on health, sustainability, and equity—then rigorously measure and publicly report progress, and tie executive pay to those outcomes. Because only what gets tracked, shared, and rewarded at the top drives lasting transformation.’**

Dr. Gunhild Anker Stordalen, co-founder and executive chair, EAT

## **Solution 6: Align food environments with healthy and sustainable diets**

Food environments are a critical enabler of dietary change. Coordinated placement, pricing, and promotion strategies can actively guide consumers toward healthier more sustainable diets.

**‘We describe food environments under three big headings – availability, appeal, and affordability... So when you’re talking about availability, you’re not just putting a few more healthy options in the mix, you’re actually changing the balance of what’s on offer. It’s the balance that really matters here’**

Anna Taylor, executive director, The Food Foundation



Policy interventions are emerging, although not yet at the pace required. High fat, salt and sugar (HFSS) legislation has forced retailers to remove less healthy products from the spotlight – including checkouts and gondola ends, both in-store and online – creating space for healthier alternatives<sup>42</sup>. Similar restrictions on junk food advertising near schools are reshaping food environments beyond retail, signalling a growing willingness by government to intervene in commercial food spaces<sup>43</sup>. Evidence shows that mandatory, structural changes are the most effective way to reduce disparities in access to healthy food<sup>44</sup>.



**‘The supermarket is the biggest and most frequented choice environment. So one way to support a shift towards lower-carbon foods is to adjust where things are placed, how things are placed, what is on offer. People want to do what’s right for the environment and for their health. Businesses could support customers and consumers in making those choices.’**

Sandra Bogelein, lead analyst for people and net zero, Climate Change Committee



## **Solution 7: Portfolio evolution and protein diversification**

Red meat and dairy production is estimated to account for 14.5% of global GHGe<sup>45</sup>. Scope 3 emissions make up around 90% of food businesses’ overall carbon footprint and for food retailers, meat and dairy make up 51% of all Scope 3 emissions<sup>46</sup>.

Leading companies are strategically reshaping entire product portfolios around the protein transition. Lidl GB is leading as the only UK retailer to set specific plant-based protein targets, aiming for 25% of total protein sales by 2030<sup>47</sup>. Across Europe, Ahold Delhaize is pursuing the goal of 50% plant-based sales by 2030<sup>48</sup>, while REWE Group in Germany is developing a comprehensive protein strategy to grow plant-based sales<sup>49</sup>.

**‘So what became something led by Albert Heijn was then taken on by all Dutch retailers. And so now, we’ve got this 50/50 target for all Dutch retailers on protein splits.’**

Daniella Vega, global senior vice president health & sustainability, Ahold Delhaize



**‘This is about rebalance, tipping the seesaw in a different direction. So when you’re talking about availability, you’re not just putting a few more healthy options in the mix, you’re actually changing the whole balance of what’s on offer. It’s the balance that really matters here.’**

Anna Taylor, executive director, The Food Foundation



**‘I’m not going to go for gold standard 100% on everything I want. I’m going to have to prioritise. What are the big bets? What do I absolutely need to get done? For me, protein diversification is key.’**

Anna Turrell, global sustainability leader



## **Solution 8: Harness the power of online**

Product filtering, sorting mechanisms, and default settings can be calibrated to promote healthier, more sustainable options, while apps translate complex health and sustainability data into simple, actionable guidance.

Consumer appetite for digital food guidance is enormous – apps like Yuka have reached 68 million

downloads<sup>50,51</sup>. At a retail level, REWE’s digital platform enables customers to assess how meals align with dietary recommendations using Nutri-Score<sup>52</sup>.

This widespread adoption shows the potential of well-designed digital tools to accelerate healthy, sustainable diets – when designed with accuracy.

**‘In terms of the trends that we’re seeing at the moment in the health and sustainability space, we’re seeing much greater convergence than we ever have done in terms of issues and solutions. And I think technology is playing a massive role in that, there’s incredible transformatory potential in terms of the impact that we can drive through the role of technology.’**

Anna Turrell, global sustainability leader

Digital platforms are also creating direct feedback loops between companies and consumers. This continuous dialogue is helping companies anticipate consumer needs and address potential issues before they escalate.

**‘I think it is really important to address some of the worries or questions that consumers have, and for consumers to have the confidence and trust that we will give them an answer.’**

Caroline Orfila Jenkins, vice president of science and technology, Oatly



## ENABLING SYSTEM CHANGE

### Solution 9: Transforming agricultural support systems towards healthy sustainable diets

Public and private investment remains heavily weighted toward animal agriculture and commodity crops<sup>53</sup>, reinforcing a production system that is not wholly aligned with dietary and climate goals.

**‘We need to unlock the funding mechanisms for more plant-based innovation, because innovation is at the core of this. I always come back to that and how that would unlock more R&D, which we desperately need in the plant-based sector.’**

Daniella Vega, global senior vice president health & sustainability, Ahold Delhaize



Farmers need coordinated support to navigate the transition toward lower impact production systems alongside expanding the UK's capacity to produce a wider mix of horticulture. All this requires new skills, technologies, and financial models.

Companies are demonstrating how crop production and supply resilience can deliver on nutrition and sustainability.



**‘We have a triangle between sustainability, nutrition, and taste, we have to operate in that sweet spot. We have an ongoing commitment to oats as the crop of choice, and you know that is for a reason – oats grow across many agroclimatic zones. We can source them from three or four different continents close to where we produce.’**

Caroline Orfila Jenkins, vice president of science and technology, Oatly

Extension programmes focused on regenerative practices can help producers improve both sustainability and profitability. There's also growing investment in demonstrating the nutrient density of regeneratively grown food, helping to build the case for healthier production models<sup>54</sup>.

**‘Working at Booths does force you to educate yourself around where food comes from. It sounds like a really odd thing to say, but you know food doesn’t start in plastic packets, does it? And you’ve got to go and understand that stuff. And when you start to go and understand it you realise just how hard it is at the start of the system.’**

Nigel Murray, managing director of Booths and Defra Food & Drink Sector Council member

Effective transition requires integrated farmer support that combines financial tools, technical assistance, and market guarantees to reduce the risks of shifting away from long-established practices<sup>55</sup>.



## **Solution 10: Policy change**

Coordinated policy frameworks that create level playing fields for the transition to healthy, sustainable diets are happening, albeit too slowly.



**‘Since the publication of the 2019 EAT-Lancet Commission, we’ve seen genuinely inspiring responses. A standout is the C40 Good Food Cities Declaration, where nearly 20 major cities committed to aligning public procurement with the principles of the Planetary Health Diet. That’s millions of meals every day building a ‘whole basket’ approach that changes not just single products, but entire food environments.’**

Dr. Gunhild Anker Stordalen, co-founder and executive chair, EAT



**‘In Copenhagen, seven years ago they decided to improve the quality of food in the public plate, and how they would procure organic food. And they absolutely smashed that target. They smashed that target in about half of the time that they had set themselves by using a very structured and systematic approach. That sent a market signals to farmers and primary producers, involving working with school kitchens about what they do with fresh and wholesome food.’**

Sue Pritchard, chief executive, The Food Farming and Countryside Commission



Progressive companies are pushing for comprehensive reporting standards that would create market clarity. There is a broader industry consensus on the need to set a level playing field for health with companies like Tesco, Nomad Foods and Iceland, along with institutional investors, supporting mandatory reporting on revenues from high-fat, salt, and sugar products<sup>56</sup>. They recognise the need for regulation to provide industry-wide accountability at pace.



**‘We are advocating for mandatory, standardised reporting by all supermarkets and large food businesses regarding their sales of healthy food products in collaboration with our health charity partners in an open letter to the Health and Social Care Secretary?’**

Alice Ritchie, head of healthy & sustainable diets, Tesco

**‘We have been right about the scale of the challenge, but until now we hadn’t developed a language and data that impressed people on the other side of the glass door. But I think that has now happened. The problem now is politics. The problem now is, the politicians are really frightened of doing something too radical.’**

Tim Lang, emeritus professor of food policy, City St George’s, University of London







## Part Four: Final thoughts – from insight to action.



**The science for healthy and sustainable diets is irrefutable. The business case is compelling. Solutions exist and are within reach. The imperative now is decisive, coordinated action.**

**‘What we need now, is to match clear scientific targets with political muscle, smart capital, global and local coalitions, and irresistible storytelling. That means mandates and incentives that reward good food, metrics that move money, mayors and farmers owning the change, and narratives that win hearts. When policy, finance, community, and culture pull together, food-systems that align with the forthcoming 2025 EAT-Lancet Commission will finally jump from paper to plate.’**

Dr. Gunhild Anker Stordalen, co-founder & executive chair, EAT



*‘Building Our Food Future: How 10 Global Visionaries Are Transforming Food Systems Through Healthy and Sustainable Diets’* presents 10 integrated pathways to deliver on this ambition. Each is centred on basket-level transformation - practical actions already being implemented by forward-thinking organisations.

Our research reveals three critical insights that set this transformation apart.



**Health and  
sustainability**

Health and sustainability are mutually reinforcing and can be addressed together at the basket level, rather than through fragmented, issue-specific initiatives.



**Integrated  
ecosystem**

The 10 pathways work as an integrated ecosystem where each solution strengthens the others, creating momentum that individual interventions cannot achieve.



**Practical  
convergence point**

The basket is a practical convergence point, making this a mechanism through which systemic change is possible.

The leaders we interviewed are driving change, aware that moving on healthy sustainable diets isn't optional. Organisations that fail to adapt will face mounting risks from supply chain vulnerabilities to regulatory penalties, consumer distrust, and adverse investor sentiment. The strategic question has shifted from whether to transform to how quickly businesses can capture first-mover advantages.

Early movers will shape the future of food by turning health and sustainability challenges into engines of innovation and competitive differentiation. They'll capture premium market segments, build stronger brand equity, establish more resilient operations, and access preferential capital as ESG considerations increasingly drive investment decisions.

This synchronised approach demonstrates why tackling health and sustainability together through basket transformation creates reinforcing cycles that deliver commercial returns while advancing both emissions reductions and health outcomes - proving they are interconnected opportunities.

No organisation can succeed alone. The barriers are systemic, the challenges interconnected. Success demands new forms of collaboration: businesses driving basket-level change, policymakers creating enabling frameworks, and civil society building a public mandate. The question is whether your organisation will help define what that future looks like. Those who act early will define the future of food and shape the rules of the next competitive era.



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# Thank You

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