IGD

Healthy, sustainable, resilient diets

Our foundations, at IGD

01 Promotion of education and training for people in or interested in entering the food industry

02 General advancement for the public benefit of science, technology and economics of the food industry including research

Our purpose

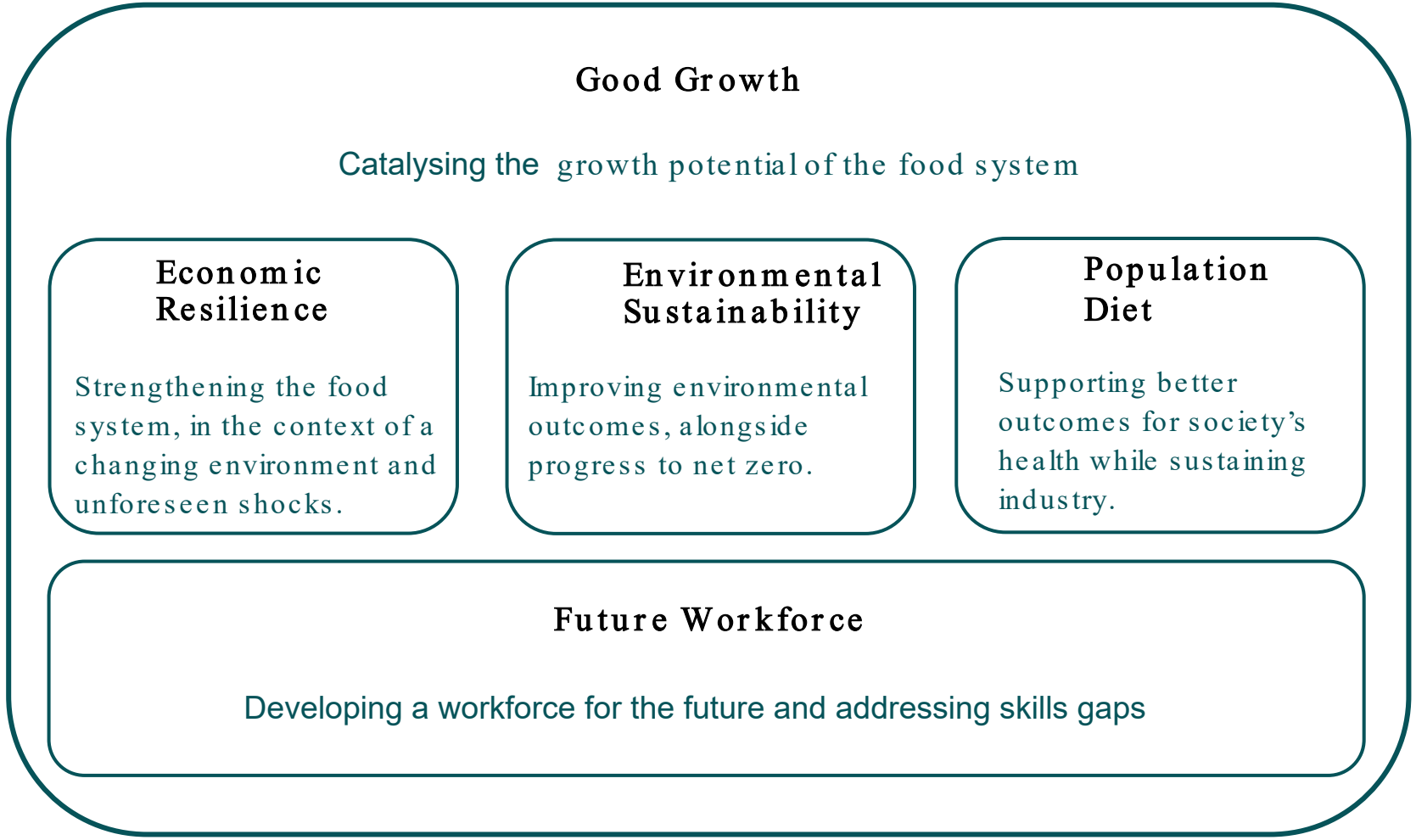
Uniting and inspiring

everyone

to deliver a thriving

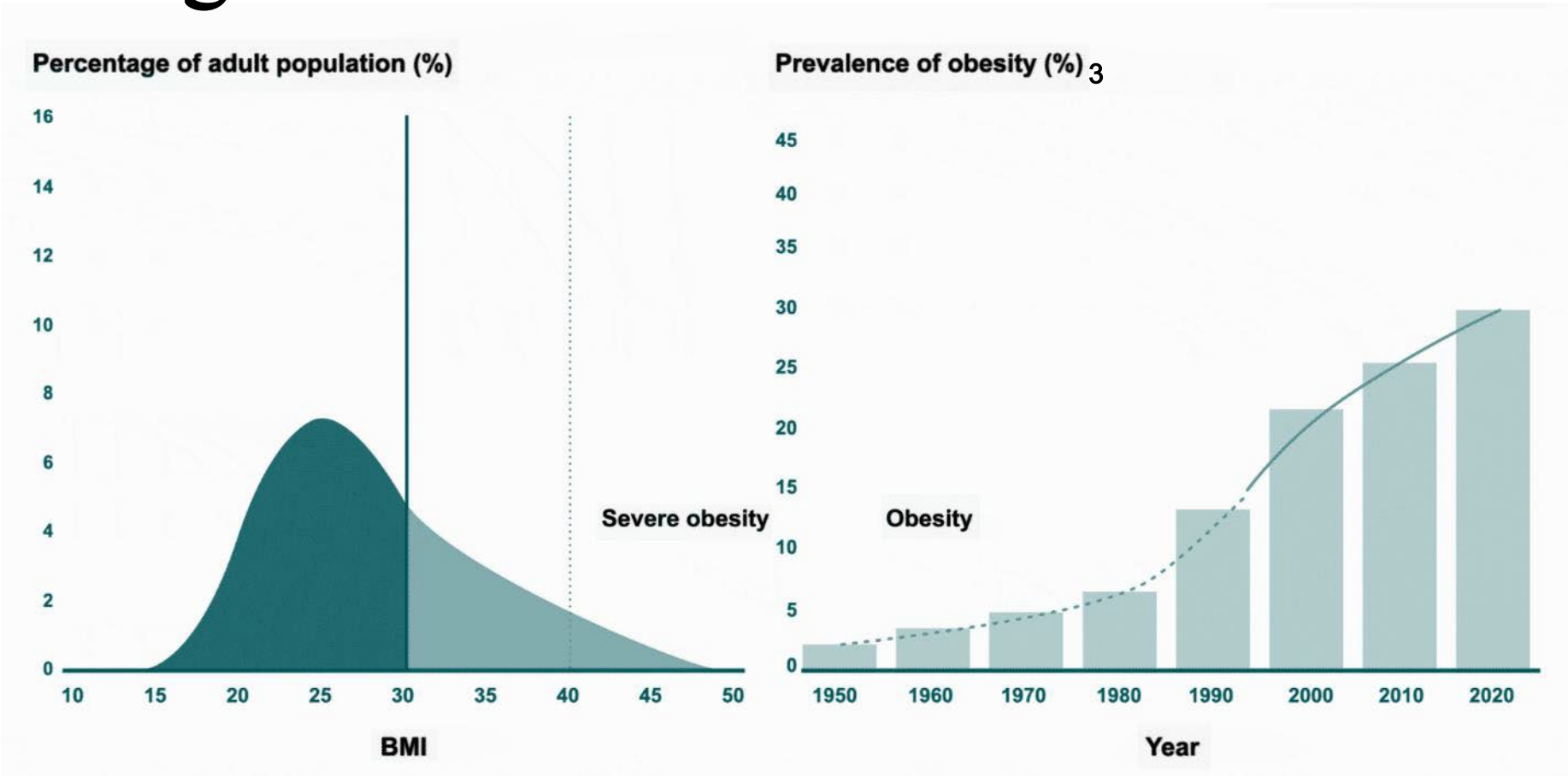
food system.

What is needed for a thriving food system?



Obesity levels are at an all-time high

1 in 5 children leave primary school with obesity



Obesity poses a major challenge for individuals, businesses, and the wider economy. The total cost to the UK of obesity and overweight is £126 billion.[1]

Nearly 1 in 5 children leave primary school with obesity[2], without change this trend is projected to worsen.

Recognising the urgency, the government's 10 Year Health Plan sets the ambition to 'raise the healthiest generation of children ever'.

 1. Frontier Economics, 2025, 2. DHSC, 2025 3. National Food Strategy, 2020

Dietary change: an enabler for health, climate and growth

The problems	
1	64.5% of adults in England are overweight or living with obesity [1]
2	UK productivity losses from diet-related chronic diseases are £116 billion annually [2]
3	Most food industry sustainability actions focus on supply, not demand
4	The food system is responsible for 30% of UK GHG emissions [3]

The opportunities	
1	Deliver health transformation through basket-level transitions
2	Healthier baskets can reduce NHS and workforce costs
3	Demand-side levers can drive brand trust, growth, resilience & investor confidence
4	Shifting to a healthy sustainable diet can cut food-related emissions by 30% [4, 5]

 1. OHID. 2025 2. Food, Farming and Countryside Commission. 2024, 3. A Net Zero Transition Plan for the UK Food System, IGD. 2024, 4. Rust et al. 2020. 5. Scheelbeck et al., 2020

The Eatwell Guide: our north star

If the UK population transitioned to an Eatwell diet

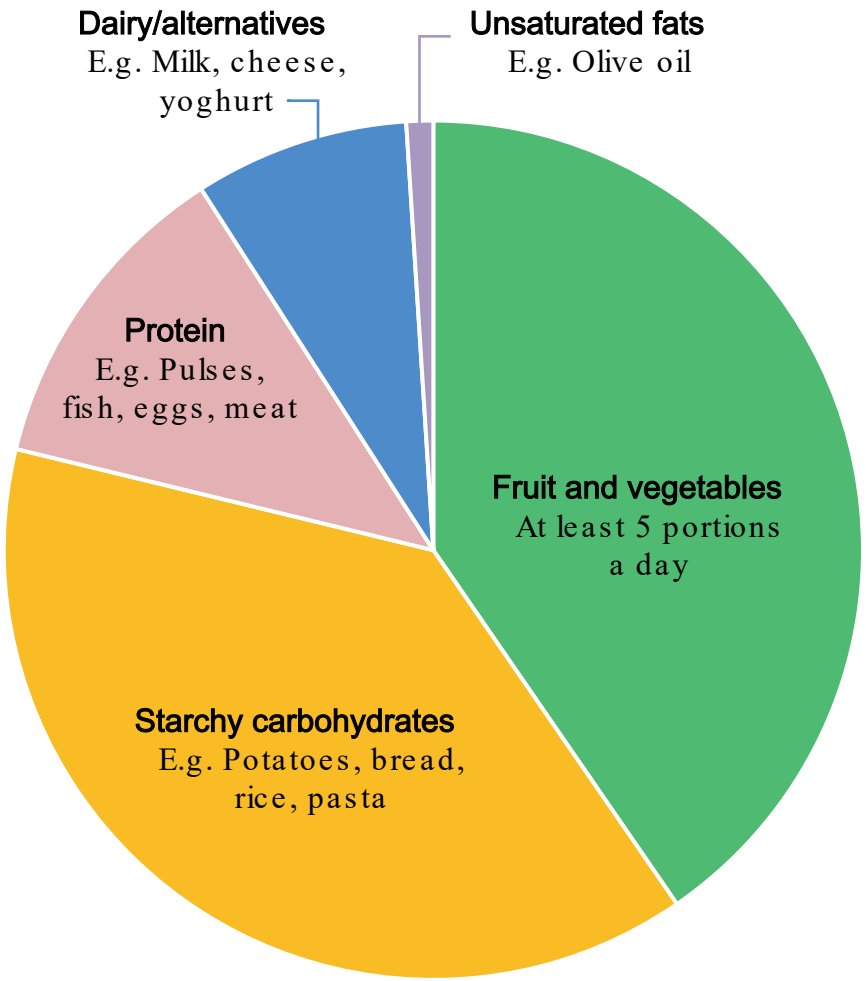
17.9m

healthy life years could be gained [1]

Intermediate-to-high adherence to the Eatwell Guide recommendations has been associated with a

30%

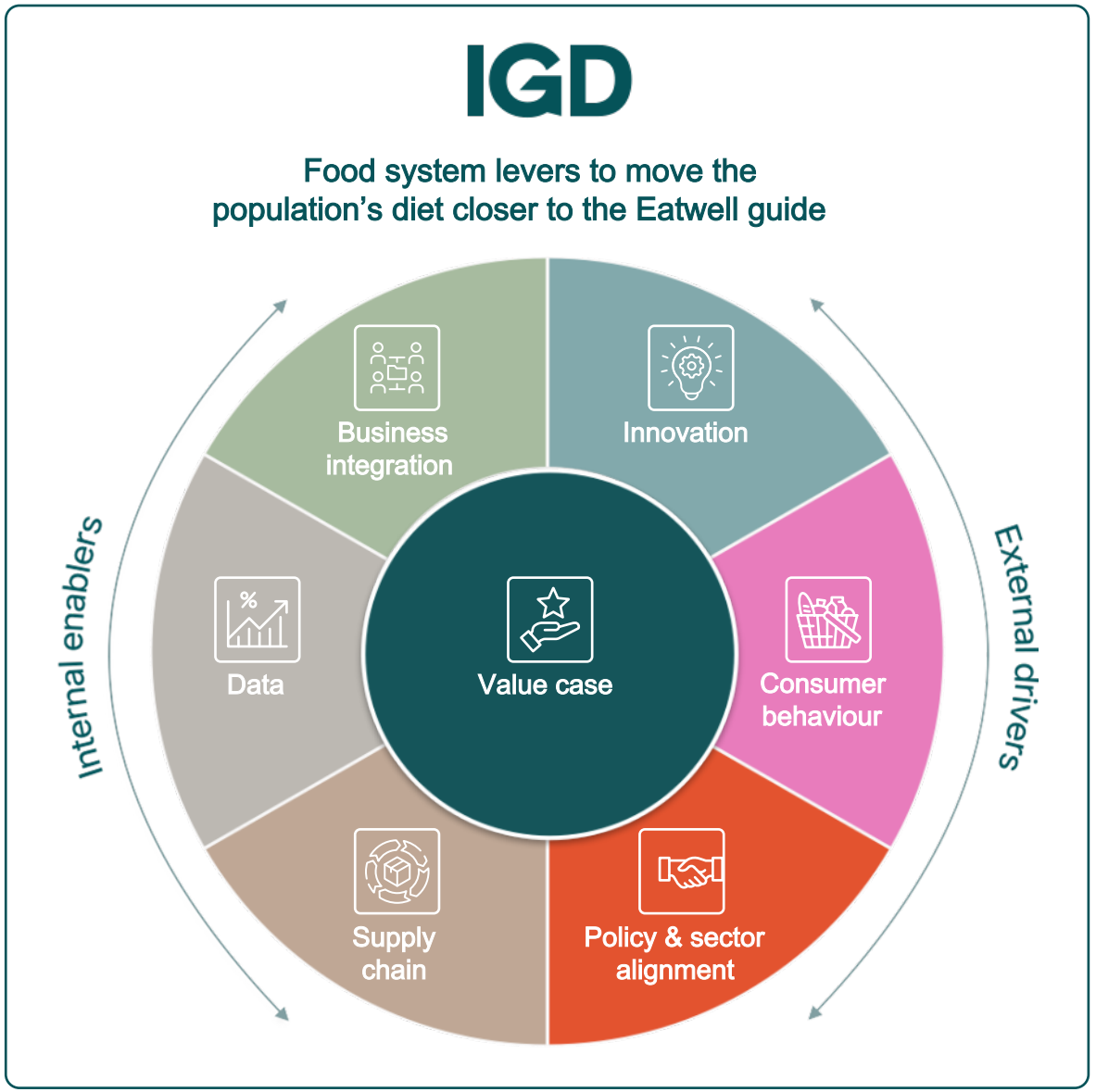
lower dietary GHGe [2]



1. Cobiac et al., 2016, 2. Scheelbeck et al., 2020

Framework for Population Diet Change

The Framework identifies seven strategic levers that the food industry can activate to shift consumer diets.



The importance of Climate Risk

The net financial impact (defined as the sum of the increase or decrease in import and domestic production costs into the UK food system as a result of physical climate change) of the ten commodities selected for analysis is highlighted under three different climate scenarios. These totals are presented assuming no dietary shift:

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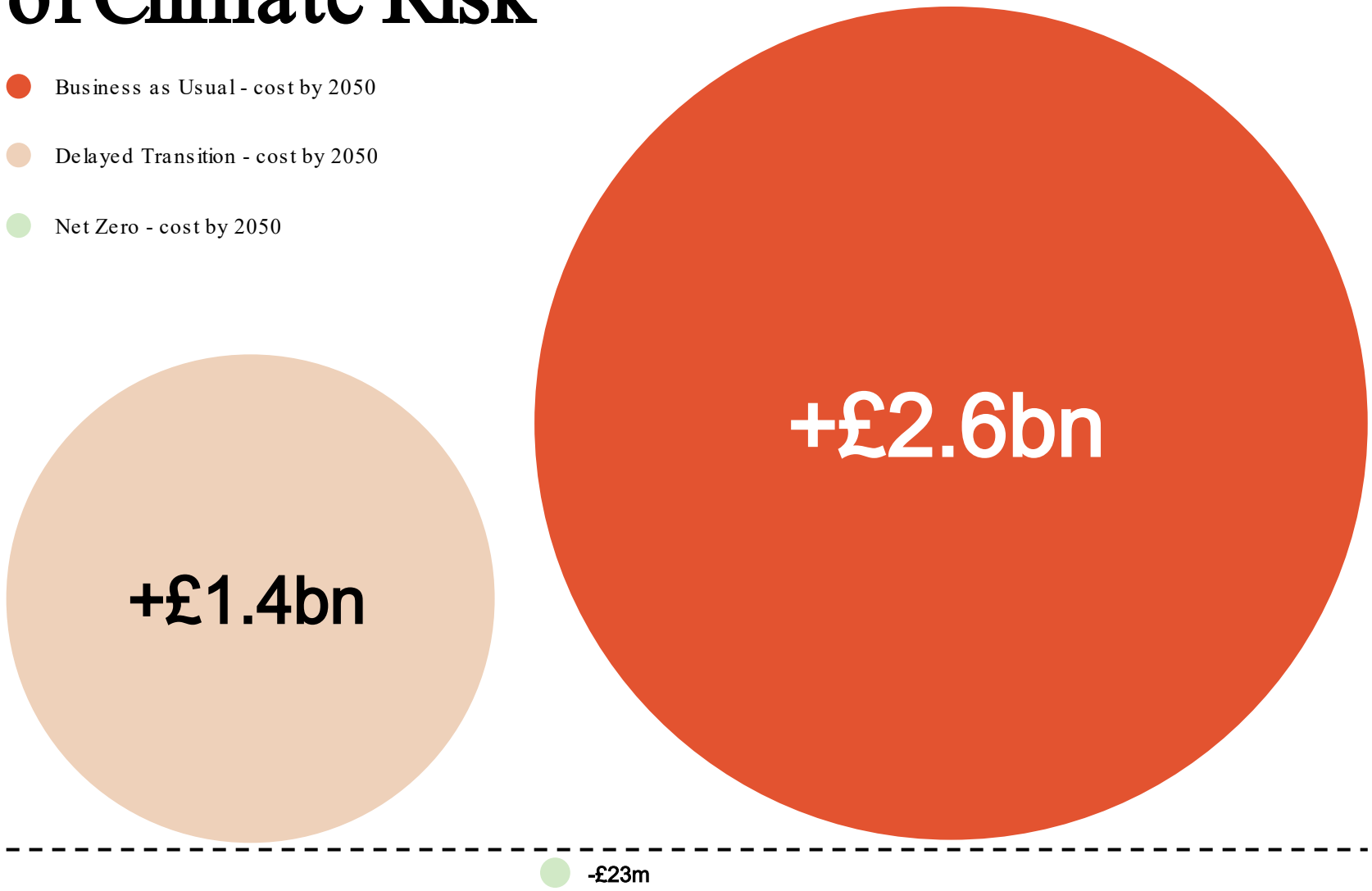
Commodities

- Banana
- Barley
- Citrus
- Milk
- Potato
- Soy
- Sunflower
- Tomato
- Wheat
- White Fish



The role of climate risk assessments Λ a model

The Model

Four environmental impacts

- Temperature
- Water stress
- Pollinator loss
- Soil erosion

Ten commodities

- Banana
- Barley
- Citrus
- Milk
- Potato
- Soy
- Sunflower
- Tomato
- Wheat
- White fish

Three climate scenarios by 2050

- Net Zero
- Delayed Transition
- Business as Usual

Additional Modules

Two dietary scenarios by 2050

- No dietary shift
- Eatwell

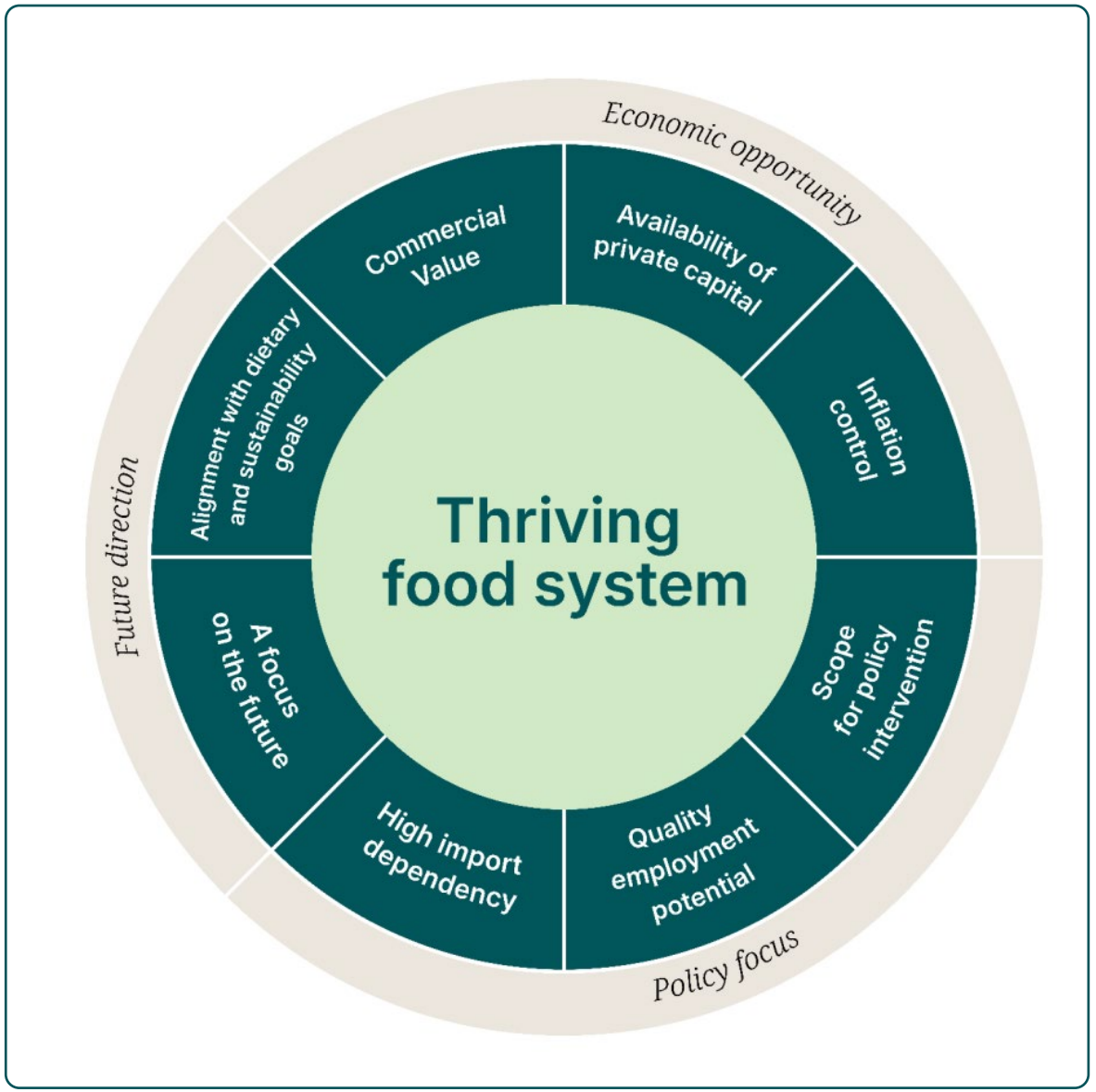
> “Resilience is absolutely critical to how we consider the food system. We□e making practical changes that build resilience into our value chain, working closely with our suppliers over the long-term to support adaptation to the multiple impacts of shifting conditions”

Guy Stuart
Director of Technical, Sainsbury’s

De‘ning Good Growth

Our latest Viewpoint Report quantified the growth opportunity as:

- £1.3bn in annual production value by 2030.
- An additional 60,000 jobs:
- Poultry jobs are likely to be more evenly spread, with a focus in the Midlands
- New horticulture jobs are likely to be mainly in the South and East of England.
- £5bn of capital investment in expanded production capacity in poultry sheds and protected vegetable facilities
- If no action is taken, the value of both sectors is likely to decline, with risk of £0.9bn loss in annual production value



Opportunities for the Seafood sector?