

# *A recipe for food trust*

## PwC's Food Supply and Integrity Services



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*“In the past it may have been enough to produce affordable food, but now only those companies that earn the trust of consumers will survive. It’s building this outcome of trust we’re striving to achieve as we help improve the safety and quality of the world’s food.”*

Craig Armitage | Global Leader, Food Supply and Integrity Services

# An appetite for change

*Building trust in food is one of the most complex problems that business and society must solve. But it’s also a great opportunity for food companies.*

You’re the ones who can get it right and create value for your brand and customers. Everybody is looking for safe, high-quality food they can trust – we can support you in building that trusted brand.

But there are challenges. Business and society is fast transforming in response to the broad changes taking place across the world – a world that is becoming increasingly complicated to read and adapt to<sup>1</sup>.

Customer expectations on quality and value are increasing, while supply chains are expanding, becoming less transparent and harder to control. Every day there is a new food issue at companies with strong brands and strong histories of safety and quality – no one is immune to the growing challenges.

Alongside these issues, regulatory change, resource scarcity, food fraud and ethics are some of the many concerns threatening that trust. Small wonder, then, that people want to know more about what they’re eating and feeding to their families. We think that’s fair enough. At the end of the day, don’t you?

Food trust helps reassure everybody your food is safe, healthy and good to eat. Therefore, it’s vital your systems and processes support that promise to sell safe food people can trust. It’s not just a statement, but a brand defining necessity.

That’s why we’re working with governments, food companies and others like you to help expand growth opportunities, reduce supply chain risks and improve the processes and systems that create trust. Building food trust presents a huge opportunity to capture market share and expand your bottom line. When food companies get it right, consumers see the value, and are more willing to pay for it. You’ll be better protected from risks and be more successful. It’s a winning strategy that wins customer preference.

That is what we offer with our Food Supply and Integrity Services. That is food trust, delivered globally by local teams offering a breadth of expertise not usually combined in an end-to-end service – from strategy and innovation through to execution.

There’s a fundamental shift taking place in the food industry, and we can’t wait to speak with you about all the changes you’re seeing. We see enormous potential to support you in building trust in your food.

<sup>1</sup> PwC, 19th Annual Global CEO Survey, January 2016



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***“The food industry is ripe for disruption – the collisions of the megatrends and the consumer demand for quality, transparency and trust mean food companies must be bold in their bets for the future.”***

Hans Schoolderman | European Leader, Food Supply and Integrity Services

# **Best before than after**

## **Prepare, prepare, prepare...**

*In these complicated times, where customer expectations are growing and food supply chains are more complex and stressed, it is more important than ever to have solid safety and quality processes.*

A daily search of the news shows stories on food borne illnesses, contamination, food fraud and product recalls. Take for example the story that hit the news in June 2015, when Chinese authorities seized more than 100,000 tons of smuggled frozen meat – some of it found to be up to 40-years-old. Or the recent example of a company that had to recall all its product due to bacterial contamination. The company had food quality programmes in place and believed the contamination issue would be corrected quickly – but after several months the company was still not producing food, and the brand value dropped significantly.

Naturally, most food companies take safety and quality issues very seriously – it is a fundamental and non-negotiable priority. Companies hit by recalls and safety and quality issues know the issues they need to deal with well, and in most cases, will try to implement solutions. So, why are these quality issues increasing, when most food companies consider it a priority?

Simply put, many food companies are struggling to ensure their processes and systems keep pace with the rapid changes in global food supply and production. Solutions can often fall victim to organisational resistance, lack of resources and time or poor supplier relationships. One of the main issues can be an over-emphasis on business performance, without the counter-balance of stressing safety, quality and trust.

Sometimes a problem can be attributed to culture and governance, requiring an increase of expectations on management to follow through on safety and quality practices on the shop floor. At other times, it could be because a company is being attacked by a fraudster looking to make a quick buck. Or perhaps it's because one supplier among thousands in a supply chain doesn't take food safety seriously.

More often than not, food companies find they are not as well prepared as they think for the risks that might come their way. Too often, we find in food companies that have experienced quality failures and recalls, the problems are considered bad luck, rather than a result of not integrating a quality focus into all parts of their business.

But we argue that by preparing for the worst and building resilience, food companies can create their own good luck. Companies are losing money and customers are losing faith because of quality and safety issues every day – and it's too costly to ignore. We can help you avoid these problems by preparing today.



## Quick bite *Fight food fraud*

PwC and SSAFE have joined forces to release a food fraud vulnerability assessment that food companies can use free-of-charge to help identify vulnerabilities and reduce fraud threats.

This is an industry-led solution that supports the Consumer Goods Forum's Global Food Safety Initiative (GFSI) guidelines. SSAFE developed the assessment with PwC, Wageningen University, Vrije Universiteit Amsterdam and in consultation with food industry leaders around the world.

PwC can help companies think through the risks they face on food fraud and close the gaps in compliance programmes, supply chains and ethics programmes. Find out more at [www.pwc.com/foodfraud](http://www.pwc.com/foodfraud).

*“How do you satisfy a market hungry for more? Hungry for more choice, value, quality, information and expectation about the values of food companies and the products they supply. It’s a challenging and important problem we can help solve.”*

Bruce Baillie | Chairman, Food Supply and Integrity Services

# The secret sauce?

## Mix food trust into your business

*Food companies must create a sense of purpose, and a business strategy and culture based upon the customer value proposition of food trust, if they want to keep growth and success on the menu.*

This is what improves your safety and quality practices, builds resilience and allows you to compete strongly on the quality and confidence your food inspires. We can help you do all of that.

But translating this corporate purpose into the everyday, however, is another matter entirely. Even the most committed can find it challenging in the extreme to reshape their company and maintain this focus while facing day-to-day battles on every front to fight off competition, grow revenues and cut costs.

Often faced with razor-thin margins, many food companies are entering new markets to stay competitive. Sourcing from low-cost suppliers, diversifying the supplier base and outsourcing core functions are some of the common practices used to control costs that could increase business risks.

It’s the decisions made across the whole organisation that can impact your food, your brand and the trust people have in you. From procurement, finance, safety and quality, marketing, compliance, acquisitions and the senior management team and board, building trust in food is everyone’s responsibility.

Consider a global food company that acquires a new processing plant, but doesn’t carry out adequate food trust due diligence on its acquisition or the suppliers it uses, resulting in a contamination issue. Or the company that labels its product as organic, but discovers its supplier is fraudulent and a food safety or quality crisis is created. Then there’s the competitor that repositions its brand around sustainable farming practices, based upon paying its farm suppliers a fair wage and addressing environmental concerns, that wins market share.

### Quick bite

#### *Proactive brand protection*

Food trust is more than just a compliance exercise relating to safety and quality management. It involves expanding the understanding of all brand risks that support customer trust and loyalty – a much more valuable and worthwhile achievement that impacts the bottom line.

The failure to effectively manage risk has resulted in operational disruptions, sub-optimal financial performance, regulatory compliance issues, weakened competitive position and deterioration of brand value. PwC has developed a diagnostic to understand capabilities across five dimensions: strategy, technology, process, policy and people. We leverage this diagnostic to understand the strengths and opportunities around delivering on your brand promise and enable improvement.





Food trust must be the guiding principle for everything your company does, but it will mean something different for every company. It requires a single-mindedness that comes from the top and influences how you communicate with your customers, employees and other stakeholders.

This doesn't mean creating more cost for little benefit. It's about creating loyalty with your customers through a brand they can trust, based upon the characteristics that matter to them.

And guess what? This saves money, builds resilience, and importantly, wins consumer preference and market share. This is how food companies thrive – and it's more important than ever.

## Quick bite *Shedding light on your suppliers*

People, and sometimes companies, don't always know what they need to know about where their food is coming from. Sure, a company knows who they bought their ingredients from, but could be in the dark about the safety and quality practices of those that are supplying their suppliers – a bewildering web of companies that could run into the thousands. Today, even the most basic foods can have massive supply chains, coming from thousands of suppliers globally. And what of the food you're selling down the supply chain? Where is that ending up – if there were problems further down your supply chain, could you prove you weren't at fault?

PwC helps companies to build better transparency through improved data collection and analytics powered by visualisation technology.

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***“Global megatrends are increasing the demand for food and creating new growth opportunities, but also complicating the food supply ecosystem and driving new challenges. We bring the strategy-to-execution support needed to increase yields, create sustainable sourcing strategies and improve quality programs to build food trust.”***

Sally Bernstein | Food Supply and Integrity Services - United States

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# What's cooking? Future-proofed success

*With our service solutions we'll help you not only understand what's required, but develop business strategies, and importantly a culture and operating model, to address what's possible.*

We'll help you define matters of the head and heart, the rational and the emotional that inspire your customers' trust and confidence. We'll link your business strategy to execution and success.

This includes addressing supplier risks, improving traceability and transparency, preparing for regulatory change, reducing food fraud vulnerabilities or helping you avoid or respond to a crisis. We'll support you on issues such as the changing consumer, competitive challenges, resource scarcity and supply security, changes to distribution channels, digital innovation, culture and governance, your growth strategy and more.

Naturally, matters of safety and quality will be your company's greatest concern, but you'll be equally concerned by issues such as sustainability, ethics, health and regulatory risk. Technology, both how it could improve quality, traceability and give people more information about your food, will be a focus. And perhaps most of all, your success will depend on sensing and addressing the rapidly changing values and expectations of your stakeholders. You'll want to know how trust itself could be disrupted.

So as you see, it's not just about helping you play defence – it's also about playing offence – finding competitive advantage by shaping a business strategy focused on disruption avoidance and sustained performance. This isn't solely risk management – though the risks are many – but creating risk resilient growth by helping you compete on the quality of your food, drive differentiation and improve margins.

There are many changes happening in the food industry – but if you are prepared and understand the impact they'll have, you can build a business that makes you stronger for the future.

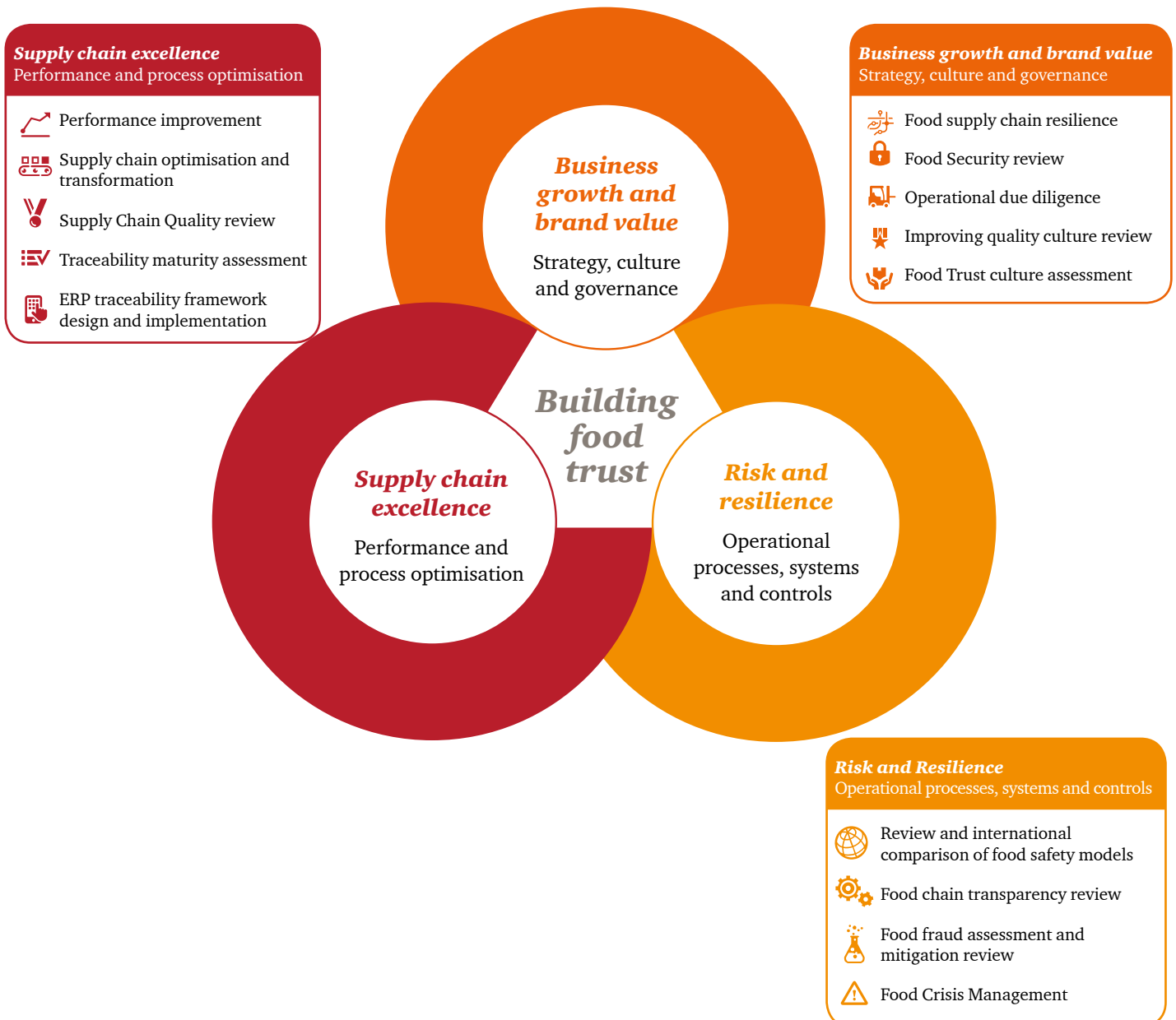


## Building trust. Our food trust framework

PwC's Food Supply and Integrity Services bring together a range of capabilities to help clients build and expand their business in response to a changing environment, reduce supply chain risk in response to growing supply complexity and improve the processes and systems that protect brands, build trust and add business value.

The end goal is food trust and business performance being one and the same – inextricably linked by a strategy, culture and an operating model that drives brand performance by putting safety, quality and customers first.

It's a total solution that can be tailored for any food company, anywhere.



“Managing and maintaining our global reputation for safe and high quality produce is critical for Australian food companies in both the domestic and export market.”

Clare Power | Food Supply and Integrity Services - Australia

# Food for thought

## Ten trends changing the food industry

*Change is accelerating – anticipate that change and you’ll be a market leader tomorrow.*

Global megatrends, such as climate change and resource scarcity and rapid demographic and social shifts, are colliding together and transforming the way we produce, sell and eat food.

It’s a world without borders, where disruption anywhere can rapidly have significant consequences for everyone. Food risks are increasing and customer expectations about what’s important are growing.

Our view is we need to prepare for more of the same, more divergence and for customers who are better informed and empowered by digital technologies. Staying on-top of these issues means adapting faster.

**Turn the page to find out our view on the ten trends changing the food industry...**





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***“It isn’t quite true that you are what you eat. At a time where public trust is at an all-time low, you are after all, what your consumers eat.”***

Josephine Phan | Halal Food Trust Leader - Malaysia

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## ***Here are the ten biggest trends we’re seeing... and what you need to ask yourself***

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### **Globalisation of food supply**

The nature of today’s global and complex supply chains means contamination can turn up in more products, more quickly than ever before. Do you have full visibility and control over your supply chain? How confident can you be in the safety and quality practices of your suppliers, or their suppliers? Can you trace your food from the consumer right back to the farm it has been grown on?



### **Integration of supply chains**

Food companies are spending millions to integrate their supply chains and improve control. How could greater integration reduce your risks? What processes and controls do you have in place to mitigate risk? How are food trust considerations impacting your acquisition strategy?



### **Scandals and increasing scrutiny**

A single lapse in quality control can easily become a brand damaging global scandal, triggering public health concerns and damaging consumer trust. Have you profiled your risk landscape to identify and quantify supply chain risks? What steps are you taking to defend your supply chain against issues such as fraud, contamination, and quality failures? How are you interacting with your stakeholders, and importantly, are you listening to their feedback? What are your recall, crisis management and recovery procedures? When was the last time you tested your response? Are you confident you can respond to supply chain disruptions without unacceptable losses?



### **Rising regulatory standards**

Governments are adopting more stringent food safety regulations and sanctions, creating unprecedented compliance risks and costs across markets. Are you ready for regulatory change? How will standards in one country impact you in another? What do you need to do to go further to win your customers’ trust, beyond regulatory compliance?



### **Shifts in global economic power**

The growth of maturing economies is creating huge consumer markets where none existed before. What changes are on the horizon that could rapidly reshape your market, either in terms of immense opportunity or challenge? How are global megatrends colliding together and reshaping your industry? What’s your growth strategy? Are you planning for growth through the lens of safety and quality outcomes? How can you create more value as you grow your business?



### **Tech, traceability and transparency advancements**

The right combination of emerging technologies and scientific advances are making a big difference to improving food quality and gathering more information about its journey to the consumer. What track-and-trace technologies could you adopt to optimise your warehousing and ordering process? How could you share more information with regulators and customers and improve your recall management processes, enabled by technological innovation? How could technology help you improve yields? How could big data, the internet of things and the consumer and competitor response disrupt your business?



### Changing food demand

Economic development and population growth are increasing overall food consumption, while middle class growth and informed consumers are demanding better quality and variety. Greater purchasing power has resulted in significant increases in the consumption of resource-intensive protein products, with big impacts on the environment and agriculture. Demand for certain standards, such as organic or halal, is growing strongly. What's your consumers' view on all this? Customer behaviour, in particular, has become more complicated as values and buying preferences evolve. How is food trust changing?



### Empowered consumers

Mobile connectivity and social media have become fundamental ways to get information and buy goods and services. Digital technologies enable people all over the world to be more connected, better informed, and as a result, increasingly empowered and emboldened. These technologies are giving people access to information about what food companies do and the impact of their actions, as well as their products. Using nothing but the phone in their pocket, anyone can share opinions, pictures and videos to expose issues and trigger a scandal – including employees, activists and media. How is digitisation reshaping the way your consumers find and share information about your food and brand?



### From compliance to competitive advantage

World-class food companies are setting internal standards that are far more stringent than those required by law. Instead of merely complying with regulatory safety requirements, they are aiming for exceptional quality that distinguishes them from their competition and builds consumer trust and brand loyalty. So who is your ultimate regulator, the consumer or regulator? Describe food safety culture at your organisation. Are you taking a top-to-bottom approach to instilling a positive culture of safety and quality? How? What staff training, awareness and incentive procedures do you have in place?



### Population growth and resource scarcity

With population growth and increased demand, we expect agricultural production will need to increase 70% to feed everyone by 2050, yet current consumption rates are already unsustainable. Governments and companies are adopting new technologies, corporate acquisitions and even diplomatic relations to secure access to the water, energy and land required to ensure sufficient food supplies in the future. How are you planning for future challenges and building resilience now?

## Quick bite *Leading from the front on culture*

Taking a leadership stand on safety and against food fraud is not only an ethical, reputational, or regulatory consideration, it's a question of growth too. Leading companies understand that future growth will depend on both safety and integrity in their supply chains, and trust in their brands. So, they proactively choose to become the companies their customers, and probably their employees, want of their food providers – before their competitors do. By addressing safety and fraud risks broadly they create an advantage.

They identify and tackle weaknesses wherever food trust issues could arise, creating greater integrity, quality, traceability and transparency throughout the supply chain. In so doing, they differentiate themselves from the pack and remain most relevant to their customers by giving them the greatest confidence in their food. That's doing smart business ethically. PwC can help you with all of that – from helping build ethics and compliance programmes to cultural maturity assessments and more.

“The agribusiness value chain, from agricultural production to final consumption, can only benefit from having greater transparency and credibility along its multiple links. Consumers will pay more for well-established brands and products that are synonymous with quality and trust.”

Ana Malvestio | South American Leader, Food Supply and Integrity Services

# Meet the team

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*“The incredible growth of China’s food and agricultural industry over the past 30 years has vastly improved nutritional standards and quality of life for consumers. But that rapid change brings with it enormous food safety and quality challenges for corporations operating in China. Challenges we can help you navigate.”*

Shirley Xie | China and Hong Kong Consulting Leader

# Still feeling hungry for content?

## Building trust in China’s food industry

*In the past it was enough to produce affordable food. In the future, only those companies that earn the trust of consumers will survive – Shirley Xie, China and Hong Kong Consulting Leader.*

During the past 30 years, China’s food industry has undergone incredible growth. Production of crops has tripled, annual pork production has grown by 350%, poultry meat output has increased more than tenfold and dairy production is now 30 times larger than it was in 1980.

Nutrition in China has improved tremendously, but regulatory enforcement, management capability, traceability and quality assurance have not kept pace with the food industry’s growth and rapid changes. At the

same time, consumers are becoming increasingly concerned about the safety and quality of the food they feed to their families.

An array of risks has emerged due to the widespread availability of cheap chemical additives, pesticides and antibiotics, as well as the introduction of intensive livestock farming and industrial food processing. The most common risks are caused by a lack of knowledge and training around new farming and production techniques, as well as economically-motivated illegal practices such as food fraud or the misuse of growth promoters.

In 2008 thousands of people were left sick and several died after consuming melamine, an industrial chemical that was added to milk in order to mask dilution. Testing has revealed cases of excessive antibiotics and pesticide residues in food, as well as the use of







illegal feed additives that accelerate livestock growth. Recently, authorities intercepted 40-year-old frozen meat in a crackdown on smugglers.

The Chinese government is actively addressing these risks by supporting modernisation, enhancing regulatory enforcement, and enacting its most rigorous food safety law ever.

Amongst all of these developments, we launched our Food Supply and Integrity Services business and PwC China entered into a strategic alliance with New Zealand's AsureQuality, a world leader in food safety and biosecurity services. We're finding innovative ways to help corporations address their food safety risks.

We're helping dairy processors by developing standard operating procedures for the farmers who supply their milk, conducting risk analysis on their production and processing chains, and up-skilling their people on food safety management. We're working with a large restaurant chain to identify risks and adopt food safety best practices in preparation for raising capital and expanding their business. We're helping a tea processor to better manage quality among its suppliers. In the area of private equity we're performing food safety due diligence on food sector investments and incorporating international practices into their growth plans.

In this rapidly evolving market, providing safe and quality food to more than 1.3 billion people presents both challenges and opportunities. In the past it was enough to produce affordable food. In the future, only those companies that earn the trust of consumers will survive.

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**“Let your food be your medicine and your medicine be your food.”**

Hippocrates of Kos | Physician

# Who wants food regulations when growth is on the menu?

*It's time to get food on the table. Food safety, that is, on the leadership team's table, says Sally Bernstein of PwC's Food Supply and Integrity Services, based in the US.*

In early September 2015, the US Food and Drug Administration finalised new rules that for the first time will require US food manufacturers to develop and implement detailed plans to prevent foodborne illness. Peel off the wrapper of these newly enacted regulations, and it's clear that they will have a far-reaching impact, way beyond US food manufacturers. Farmers and growers, food processors, distributors, retailers and restaurants will be affected, both companies in the US and those in other countries that supply them.

The regulations themselves have been around for a while, but now there's a deadline for businesses to become compliant. For large companies it's 2016; for smaller ones it's 2018. Many will consider this a burden that the food-manufacturing industry and its supply chain don't need on their plate. Indeed, in PwC's 18th Annual

Global CEO Survey, 78% of CEOs cited overregulation as the top threat to business growth prospects. Who wants to deal with regulatory complexity and cost when growth opportunities are on the menu? The world's population is growing rapidly – more people need to eat. Millions of people are moving into the middle class in developing economies – more people can afford to eat more. And the general trend to urbanisation means that more people are moving further away from food sources. It should be a rosy future for the food industry, so it shouldn't be surprising that stakeholders don't have a great appetite for new regulations.

Leading companies are adopting a different mind-set, though. They understand that the changing regulatory landscape is only the first step in a long, and potentially positive, evolution for the food industry. This isn't predominantly a regulatory imperative; rather it's a consumer-driven shift in beliefs. And in that light, they see regulation not just as a threat to growth, but also an opportunity to adapt and take advantage of change. It's a chance to innovate, be the first to respond to shifting customer tastes, to





step out ahead of the competition and capture a good portion of that growing market for food. This is the hallmark of a group of CEOs we identify as ‘resilience builders’ – that 30% who see both more opportunities and threats, and do something about them.

There’s an expression that goes, “The way to a man’s heart is through his stomach” – in other words, cook a person a good meal and he will be your loyal friend. But leading food companies know that in the future, the way to their customers’ stomachs will be through their hearts. To gain customer trust and loyalty, companies will need to make sure they deliver on what their customers really care about: What’s in their food? Where does it come from? What impact did production have on the land or the water basin there? Sure they want to know their food is safe, but all these other factors – known as the path from farm to fork – are increasingly important to them, too. They want transparency, and make buying decisions based on whether they have confidence in what they hear.

Leading companies know that future growth will depend on integrity in their supply chains and trust in their brands. So, they choose to see these reforms as a catalyst for becoming the companies their customers want of their food providers – before their competitors do. By addressing risks broadly, they create an advantage. They identify and tackle weaknesses wherever food trust issues could arise, creating greater integrity, quality, traceability and transparency throughout the supply chain. In so doing, they differentiate themselves from the pack and remain most relevant to their customers by giving them the greatest confidence in their food.

### **So what can you do to capture more than your share of the market while dealing with the tighter regulations?**

1. Get food trust on the leadership table. While food manufacturers commonly cite food safety within their top three threats, responsibility for addressing the risks is usually delegated way too far down in the supply chain organisation. Food trust affects the long-term resilience of your organisation and, as such, should be given executive sponsorship.
2. See it as an evolution, something that needs a strategic response, not just a compliance matter. Get the right people at the table – everybody from Compliance to Customer, Supply Chain to Strategy, PR to HR. How can you work coherently to create food trust?
3. View your food safety strategy through a risk-based, preventive lens, with a focus on quality management, product integrity, food defence and traceability. Gone are the days of considering only technical hazards, such as microbiological issues, or packaging environments. Food trust requires getting out ahead of the risks and looking at the entire ecosystem involved in bringing that frozen pizza to the plate.

4. Regularly review supply chain risks and benchmarking against best practices. Proactive behaviour in supplier risk management leads to fewer compliance costs, fewer product recalls and improved consumer confidence.
5. Instil a positive culture of safety and quality from the farm to the shop floor. Leading organisations adopt innovative practices that extend to staff awareness and training across the supply chain. In addition, they analyse leading indicators to identify and manage potential risks, which may extend to customer complaints, media reports and customer trends.

The global food industry has never faced such a range of challenges, and navigating these more stringent regulations will only add to the complexity. But never has the industry been served up such a feast of growth opportunity either. Organisations that will prove most resilient are those that see the compliance requirements not just as a burden or cost, but as an opportunity to capture growth by becoming more relevant to the market as the trustworthy food providers their consumers want.



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***“Building trust is a winning strategy that the world’s most successful food companies are prioritising and investing in to win customer preference and market share.”***

Julia Leong | Southeast Asia Leader, Food Supply and Integrity Services



# Tackling food fraud

*Do you know what you are really selling? Asks Julia Leong, Southeast Asian Leader of PwC’s Food Supply and Integrity Services Singapore.*

Food scandals have been on the rise in recent years. When news of horse meat being sold as beef broke, even consumers outside of the affected region exercised caution in their future purchases. It has been three years since the scandal, but it remains vividly remembered by consumers globally.

Closer to home, we have seen fake herbal tea imports being sold here in Singapore and it was reported that the Malaysian government seized imitation food products in a raid last year.

According to the Global Food Safety Initiative, food fraud refers to a deception of consumers using food products, ingredients and packaging for economic gain and involves any substitution, unapproved enhancements, misbranding, counterfeiting, and stolen goods.

Hence it is vital that companies continually ask themselves – What am I really selling?

Beyond the economic cost, estimated by the Grocery Manufacturers Association (GMA) to be US\$10 to US\$15 billion annually, a single food fraud incident can lead to serious health risks for consumers and adversely damage your business’ brand and hard-earned reputation. It can make a company go out of business.

Yet, food counterfeiting is expected to continue, despite how seriously food companies take this issue. The rising cost of food production, coupled with intense competition in the retail sector, is creating new challenges – resulting in increased complexity in food supply chains, which presents many opportunities for food adulteration.

As the awareness of food safety and integrity continues to rise, tackling food fraud gets more demanding as it faces these challenges: a lack of upstream supply chain visibility, poor supply chain risk management practices, low margins and the presence of complex and constrained regulatory frameworks.

While food fraud is not new and the vast majority of food is safe, regulators, food companies and consumers are taking fraud very seriously. Food is an industry where customer trust and confidence is paramount. It is critical for governments and the industry to take a strategic and innovative approach to tackle the problem effectively.

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***“An army marches on its stomach.”***

Napoléon Bonaparte | Emperor of the French

***How confident are you in the integrity of your food products? Here is a checklist of questions that you need to continuously ask yourself:***

- Is fraud considered a significant issue in your industry and company?
- How simple is it to adulterate or counterfeit your products?
- Do you have reliable detection methods in place?
- Are you able to rapidly report incidents?
- How would you describe your production lines and process activities?
- How transparent is your part of the food supply chain?
- Do you know your suppliers, and beyond tier one suppliers?
- Do your suppliers have counter food fraud strategies in place?
- How robust is the recall process you have in place?

To ensure resiliency in your end-to-end food supply chain, it is essential that your company takes a proactive approach to tackle food fraud. Your first step may be to assess your company’s vulnerabilities using the free-to-use food fraud vulnerability assessment, available at [www.pwc.com/foodfraud](http://www.pwc.com/foodfraud).

Jointly released by PwC and SSAFE, completing this online assessment will provide you with your company’s potential food fraud vulnerability, which can form the basis for the development of controls to reduce identified vulnerabilities.





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*[www.pwc.com/foodtrust](http://www.pwc.com/foodtrust)*

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