

## International Sustainable Food Barometer (2<sup>nd</sup> edition)

# Inform and Inspire: Two Global Levers Driven by Sodexo to Accelerate a Transition toward Sustainable Food

Issy-les-Moulineaux, 14 November 2024

### A Barometer supporting a Global Transition toward Sustainable Food

Sodexo unveils the results of the second edition of the International Sustainable Food Barometer<sup>1</sup>, in partnership with Toluna Harris Interactive. The purpose of this Barometer is to identify the barriers and concrete levers to change eating habits and accelerate the shift toward more sustainable food.

**Sophie Bellon, Chairwoman of Sodexo's Board of Directors and Chief Executive Officer said:** *"This second edition of the Sustainable Food Barometer strengthens our convictions and reinforces our commitments. It confirms that most individuals are willing to embrace more sustainable eating habits. It also reveals how much they rely on the Food Service sector and chefs to help them do so! Finally, and perhaps most importantly, it highlights the pressing need to bring together the concepts of pleasure and health, which are too often viewed as opposing forces."*

### The 3 Key Takeaways of the Barometer

**First key takeaway:** sustainable food generates widespread enthusiasm, although it is more measured in Western countries due to the inflationary economic context.

- **Citizens have a very positive view of sustainable food in all countries:** 74% of them perceive it positively or very positively. However, **this enthusiasm tends to wane in Western countries due to the inflationary economic context.** The Barometer highlights a gap between the very positive perception of sustainable food in "New World" countries (with nearly two-thirds of Brazilians and Indians holding this view) and a more moderate enthusiasm in "Western countries," where only 20 to 30% of citizens have a "very positive" perception of sustainable food.
- **For two-thirds of consumers, sustainable food contributes to improving quality of life:** It is seen as healthier and more balanced, with 47% perceiving it as beneficial to health. Its positive impact on the environment (51%) and the protection of biodiversity (43%) is also widely recognized.

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<sup>1</sup> A study carried out in July 2024 with over 7,000 people in Brazil, France, India, the United Kingdom and the United States. All the results are online on our website [www.sodexo.com](http://www.sodexo.com)

**Second key takeaway: price, taste, and health are the three key factors most likely to encourage all consumers to adopt sustainable eating habits, regardless of their interest in the topic.**

- The Barometer identifies three main consumer profiles when it comes to sustainable food:
  - 42% are "**Committed**", who consume sustainable products whenever possible.
  - 44% are "**Undecided**", who are hesitant to choose sustainable products even when available.
  - 14% are "**Distant**", who have no intention of consuming more sustainable products.
- **For all consumers, price remains the number one factor in choosing food products** (73% place it among their top five criteria), **far ahead of environmental concerns** (27%).
- For all three groups, **taste ranks just behind price as a key factor in making food choices.** Health also emerges as a crucial element: nutritional value and product composition are the third and fourth most important factors in the decision-making process.
- The risk of losing **taste and flavor** is the main barrier of transitioning to sustainable food.
  - 47% of the Committed, 68% of the Undecided, and 70% of the Distant consumers are not willing to consume a sustainable product if it is less tasty than a regular product.
  - The price barrier is also significant: 37% of the Committed, 62% of the Undecided, and 69% of the Distant consumers are not willing to consume a sustainable product if it is more expensive.

**Focus on meat consumption**

Contrary to popular belief, **the most "Committed" citizens consume meat almost as often as the "Undecided" and "Distant" groups.** However, the "Committed" are more likely to consider reducing their consumption or have already started doing so, particularly when it comes to red meat (86%).

**Third key takeaway: for consumers, Food Service providers are key drivers of the transition toward more sustainable eating habits.**

**1. A strong need for inspiration and information expressed by consumers.**

- **Behind farmers (43%) and the food industry (38%), Food Service providers are expected by citizens to play a leading role** in the transition to more sustainable eating habits (an increase of 8 percentage points compared to 2023);
- A strong need for inspiration emerges from the study: **47% of the Committed and 40% of the Undecided believe that sharing recipe ideas with sustainable products or offering cooking tips would help them change their individual practices.**
- Furthermore, **46% of the Committed and 37% of the Undecided** consider it necessary to highlight nutritional information more prominently on products and dishes.

**For Carole Galissant, Director of Food Transition and Nutrition at Sodexo France:**

*"Consumers are ready to change their eating habits, but they need support to achieve this. This is precisely where Food Service providers have a key role to play. It is our role to introduce lesser-known ingredients and offer recipes that are both tasty and responsible, encouraging people to adopt a more sustainable diet! In this regard, our chefs will be the catalysts for change."*

## 2. The 4 main areas where Food Service providers are expected to accelerate the transition toward more sustainable eating habits:

- **Reducing food waste** is a priority for 50% of citizens (an increase of 2 percentage points compared to 2023).
- **Responsible production practices** are now essential: 41% of citizens believe that Food Service providers should prioritize sourcing **local food products**, and 40% believe they should focus on products from **agricultural practices that are more environmentally friendly**.
- **Chefs' creativity and the originality of the recipes offered** are key drivers for 37% of respondents.
- **Informing citizens** is a responsibility that Food Service providers must take on, according to over a third of respondents

## Sodexo's commitment to progress

As a key player in the Food Service industry and a long-standing advocate of responsible growth, Sodexo is a unique observer of evolving consumer behaviours, expectations, and aspirations, thanks to its presence in 45 countries serving 80 million consumers each day. Sodexo's ambition is to positively influence consumer choices and mobilize the entire ecosystem to accelerate the food transition. The adoption of sustainable food practices is more urgent than ever. This Barometer highlights concrete levers to significantly transform consumers' eating habits.

**Sodexo aims to continue leveraging these drivers through concrete initiatives** to accelerate the shift towards more sustainable eating habits and reduce its emissions across its entire value chain, from field to plate.

- **Inspiring through the creativity of chefs:** As the Barometer reveals, recipes play a key role in the ongoing transition. Sodexo trains its chefs and teams to create new plant-based dishes that inspire and entice consumers through its brands such as Modern Recipe, Good Eating Company, and Fooditude. The goal is to support more responsible food choices while making pleasure and indulgence accessible to everyone.
- **Providing information about products** through effective digital solutions such as the Everyday app, which displays the environmental impact of the dishes offered and guides consumers. Tools like Power Pricing and Product Swap help integrate environmental criteria into the product selection and pricing policies for the products offered to consumers.
- **Reducing food waste:** Through the rollout of the WasteWatch program, which will be implemented at nearly 77% of its sites by 2024, Sodexo aims **to cut food waste in its operations by half by next year.**
- **Promoting local food products and sustainable agricultural practices,** supporting its suppliers in reducing their carbon emissions, and mobilizing its entire ecosystem to create a positive environmental impact.

## About Sodexo

Founded in Marseille in 1966 by Pierre Bellon, Sodexo is the global leader in sustainable food and valued experiences at every moment in life: learn, work, heal and play. The Group stands out for its independence, its founding family shareholding and its responsible business model. Thanks to its two activities of Food and Facilities Management Services, Sodexo meets all the challenges of everyday life with a dual goal: to improve the quality of life of our employees and those we serve, and contribute to the economic, social and environmental progress in the communities where we operate. For Sodexo, growth and social commitment go hand in hand. Our purpose is to create a better everyday for everyone to build a better life for all. Sodexo is included in the CAC Next 20, Bloomberg France 40, CAC 40 ESG, CAC SBT 1.5, FTSE 4 Good and DJSI indices.

## Sodexo Key figures

- 23.8 billion euros in Fiscal 2024 consolidated revenues
- 423,000 employees as at August 31, 2024
- #1 France-based private employer worldwide
- 45 countries
- 80 million consumers served daily
- 11.2 billion euros in market capitalization (as at October 23, 2024)

## About Toluna Harris Interactive

Toluna Harris Interactive is a leading global research and insights provider that empowers clients to make smarter data-driven decisions. Combining our flexible platform, cutting-edge technology, expansive portfolio, and passionate experts, we simplify our clients' work and enable them to deliver greater business impact. With over 75 offices across the globe, we are delivering research in 100+ countries to the world's leading brands.

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