FutureBridge

NEWSLETTER JULY 2026 EDITION

Kottmeyer's Almanac *on* MIDSTREAM

The Boardroom Brief: What Global Midstream Food & Agribusiness C-Suite Needs to Know

EXECUTIVE SUMMARY: THE 7 STRUCTURAL THEMES OF JULY 2026

Theme 1: Capabilities Are Consolidating Around Scale

Midstream consolidation is shifting from revenue accumulation to capability control. Deals involving Ingredion–Tate & Lyle, Solina, Döhler, Danone and Orkla show companies buying specialist processing, proprietary formulations, ingredient platforms and regional production capacity that would take years to build organically.

The real prize is not size, but control over the capabilities that determine category economics. Scale becomes valuable when it strengthens formulation depth, sourcing leverage, manufacturing flexibility and access to growth markets. Specialist processors and ingredient businesses will therefore remain attractive targets. Yet acquisition alone creates no advantage: unless plants, procurement, quality systems and commercial teams are integrated, buyers risk adding complexity faster than value.

Theme 2: Capacity Is Shifting to Higher-Value Assets

Manufacturing investment is becoming more selective. Ribena, Lactalis, Mondelēz, Nestlé and Mars are directing capital toward value-added formats, automated lines, growth categories and strategically important markets, while DFA, JBS and Schwebel are closing or selling assets that no longer support returns.

This marks a shift from capacity expansion to capacity productivity. Plants will increasingly be judged on flexibility, yield, labour efficiency, location and ability to handle complex formulations – not simply on available volume. Older or underutilized facilities may become liabilities where they cannot support faster changeovers, tighter specifications or higher-value products. Capital will continue moving toward fewer, more capable assets, while weaker facilities face closure, divestment or conversion to alternative uses.

Theme 3: Compliance Is Becoming an Operating Constraint

Regulation is moving deeper into product formulation and factory operations. Recalls, labelling rules, colour reformulation, protein-claims disputes, GMO requirements, packaging regulation and product taxes show that compliance increasingly determines which ingredients can be used, how products are made and whether they can remain in market.

The strategic dividing line will be the ability to absorb regulatory change without disrupting supply or destroying margin. Stronger players will embed compliance into supplier assurance, formulation, testing, traceability and packaging decisions from the outset. Those with fragmented data or weak controls will face recalls, plant interruptions, forced reformulation and retailer delisting. Regulatory readiness is therefore becoming a source of customer trust and market access, not simply the cost of doing business.

Theme 4: Factories Are Moving Toward Traceable Control

Factory investment is shifting from basic automation to real-time process control. AI-enabled cutting, intelligent sensors, calibration systems, metal detection and line-level traceability show manufacturers using technology to protect yield, consistency, safety and specification compliance – not merely to reduce labour.

The advantage will sit with companies that can turn fragmented plant data into operating control. Facilities that link raw materials, processing conditions, quality results and maintenance records will identify deviations earlier, reduce waste and respond faster to customer or regulatory inquiries. Technology will not rescue a poorly run operation, but it can make a disciplined factory more predictable, scalable and defensible. Traceability and process visibility are becoming central to both plant economics and customer confidence.

Theme 5: Margin Pressure Is Forcing Portfolio Resets

Persistent cost pressure is forcing manufacturers to reconsider which businesses and products still deserve investment. Restructuring at Kraft Heinz, General Mills, Synlait and Fonterra is occurring alongside market exits, cost programmes and new investment in protein, collagen, non-dairy and reformulated products.

This is not another round of temporary cost cutting. It is a reassessment of where the industry can still earn attractive returns. Commodity-like products with weak pricing power are becoming harder to defend, particularly when they add manufacturing complexity or require dedicated assets. Durable margin improvement will come from pruning low-quality volume and concentrating resources behind differentiated products. Portfolio quality is becoming more important than portfolio breadth.

Theme 6: Trade Friction Is Redesigning Supply Chains

Tariffs, export restrictions, geopolitical disruption and commodity volatility are making food supply networks more difficult to manage. Developments across North American trade, UK exports, Iranian disruption, sourcing concerns and warehouse interruptions show risk rising across both input supply and finished-product market access.

The old model of optimizing around the lowest-cost source is giving way to a model built around optionality. Regional manufacturing, alternative suppliers, flexible formulations and strategic inventory will become more important as companies balance efficiency against continuity. These measures carry cost, but so do idle plants and lost customers. Companies with diversified networks and stronger scenario planning will be better positioned to protect utilization and margins, while concentrated sourcing models will carry a growing risk premium.

Theme 7: Packaging Is Becoming a Performance Lever

Packaging is moving beyond sustainability claims to become a broader product and operating lever. Developments in shelf-life extension, recyclable films, low-carbon cartons, food-contact coatings and digital labels show packaging being evaluated against product protection, line performance, waste reduction, accessibility and regulatory readiness.

The winning formats will be those that improve environmental performance without compromising shelf life, production speed or distribution resilience. A material that creates line disruption or increases product loss simply shifts cost elsewhere in the system. Packaging decisions will therefore require closer coordination across product development, operations, procurement and regulatory teams. Suppliers that can demonstrate machinability, compliance and measurable shelf-life benefits will gain strategic relevance.

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THEME 1:

Capabilities Are Consolidating Around Scale

1. Ingredion's $5 Billion Tate & Lyle Deal Resets Ingredient Scale

***Bakery & Snacks* |** *Read Article*

Ingredion launched a recommended all-cash offer for Tate & Lyle, implying an enterprise value of approximately £3.7bn, or $5bn. The combination would broaden Ingredion across texturants, sugar reduction, fortification, multi-ingredient systems and recipe development. Ingredion operates in 22 countries and serves customers in nearly 120 markets. The proposed group is designed to address more applications with integrated formulation capabilities rather than selling individual starches, fibers, sweeteners or stabilizers. The transaction remains subject to shareholder and regulatory approvals.

SO WHAT: This transaction confirms that food manufacturers increasingly want fewer suppliers capable of solving texture, nutrition, cost and processing constraints together. Ingredion is buying the breadth needed to move from selling individual components toward owning larger formulation systems. That strengthens its influence over reformulation decisions and procurement relationships across multiple categories. The second-order effect will be margin pressure on mid-sized ingredient companies that lack either proprietary technology or application depth. The defence is not lower pricing. It is faster reformulation, measurable performance and technical capabilities that a scaled platform cannot easily replicate.

NOW WHAT → FutureBridge: If you run an ingredients, bakery or beverage business, treat the combined Ingredion–Tate & Lyle platform as more than supplier consolidation: it resets innovation access, bundled pricing, technical-service expectations and negotiating power across multiple formulation systems. Quantify dependency, margin and substitution exposure by ingredient family. Then use FutureBridge's Company Genomics, OSINT and Consumomics capabilities to identify defensible formulation IP, unmet customer needs and alternative partners, converting the analysis into a prioritized supplier-negotiation, reformulation and portfolio-defence roadmap.

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2. Daabon Becomes the Americas' Largest Palm-Oil Producer

***Food Manufacture* |** *Read Article*

Colombia's Daabon acquired 100% of Agropalma's operations in Pará, marking its entry into Brazil and creating the largest palm-oil producer in the Americas. The assets include 39,000 hectares of planted oil palm, 64,000 hectares of forest reserves, six extraction plants in Tailândia, a refinery in Belém and an export terminal. Agropalma is a major producer of palm oil and derivatives. The purchase gives Daabon an integrated production, refining and export platform in the region. Financial terms were not disclosed.

SO WHAT: Daabon is buying more than production capacity; it is buying control over which customers get served when supply tightens. The acquisition integrates plantations, extraction, refining and export infrastructure into a single platform, strengthening control over traceability, allocation and logistics. That makes Daabon a more valuable strategic supplier but also concentrates negotiating power and certified product availability in fewer hands. Food manufacturers will need to secure long-term relationships with integrated producers rather than rely on spot procurement. In palm oil, traceability is no longer a compliance checkbox; it is the price of staying on a global buyer's approved list.

NOW WHAT → FutureBridge: If you source oils, fats or oleochemicals in the Americas, read this acquisition as evidence that certified regional supply is consolidating faster than buyer contracting models are adapting. Put access, traceability and logistics resilience ahead of short-term spot-price optimization, and model the revenue exposed as preferred capacity shifts toward strategic customers. Use FutureBridge's intelligence agency-grade OSINT capability to track subsidiary activity, permit filings, regulatory submissions, trade flows and pre-announcement deal signals that commercial databases fail to capture systematically. Convert that intelligence into a supplier-concentration map, contracting trigger points and a regional sourcing and partnership strategy before commercial flexibility disappears.

3. Danone Buys a €300 Million APAC Nutrition Platform

FoodNavigator* | *Read Article

Danone agreed to acquire Australia's Made Group, whose portfolio includes Cocobella coconut water and Rokeby Farms protein beverages, while also purchasing Saputo Dairy Australia's remaining 49% stake in their fresh-dairy joint venture. Made generated more than €300m in sales for the fiscal year ending June 2026 and delivered double-digit growth. Full ownership of the dairy venture gives Danone control of YoPRO, Activia and Ultimate in Australia. Both transactions are expected to close in the second half of 2026.

SO WHAT: Danone is acquiring growth formats already proven in the local market rather than exporting a global portfolio and hoping demand follows. Made brings coconut water and protein beverages, while full control of the dairy venture removes decision friction around brands such as YoPRO and Activia. Together, the transactions create a faster route to scale in Asia-Pacific functional nutrition. The broader read-through is that global companies will increasingly buy local demand signals, brands and manufacturing systems together. Regional challengers become strategically valuable once they demonstrate repeat purchase, but that same proof makes independence harder to preserve.

NOW WHAT → FutureBridge: If you run a nutrition, dairy or functional-beverage business in APAC, treat this transaction as evidence that global growth is being secured through local brands, supply chains and routes to market rather than built gradually from headquarters. Identify the markets where organic expansion will arrive too late, quantify the resulting revenue gap and set acquisition, partnership and distributor thresholds now. Use FutureBridge's intelligence agency-grade OSINT capability to track subsidiary activity, permit filings, regulatory submissions, trade flows and pre-announcement deal signals, and produce a country-level target map, partner shortlist and sequenced market-entry and investment plan.

4. Varun Beverages Buys Kenyan Dairy and Juice Platform

Just Drinks* | *Read Article

Varun Beverages agreed to acquire Devyani Food Industries Kenya's dairy beverages, juices and packaged-water business for $32m through its Kenyan subsidiary. The transaction includes the Daima brand, operating assets and a 52-acre manufacturing facility in Nakuru. The business is being acquired on a going-concern basis, with completion targeted by 1 August 2026. The deal extends Varun beyond carbonated soft drinks and strengthens its production and distribution presence in East Africa.

> **SO WHAT:** The non-obvious read is that Varun is not simply buying beverage volume; it is buying a ready-made route into higher-value dairy and juice categories. Owning the brand, plant and distribution base compresses the time required to diversify beyond carbonated drinks and improves control over margin, service and innovation. The second-order effect is that regional beverage players without cold-chain reach or multi-category production become structurally weaker acquisition targets. In African beverages, the advantage will increasingly sit with operators that can combine local demand, manufacturing scale and route-to-market control.

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5. Royal A-ware and Grupo TGT Build a Southern European Cheese Platform

Just Food **|** *Read Article*

Dutch dairy group Royal A-ware and Spanish cheese company Grupo TGT agreed to combine their businesses. Grupo TGT sells more than 100,000 tonnes of cheese annually, operates 17 sales offices in Spain and exports to around 35 countries. The transaction gives TGT access to Royal A-ware's international manufacturing capacity, supply-chain integration and product-development resources, while Royal A-ware gains a stronger Southern European position across retail, food service, industrial and private-label channels.

> **SO WHAT:** Independence has just become harder to defend. Southern European cheese processors could previously offset their lack of scale with stronger local relationships, denser distribution and deeper market knowledge. The Royal A-ware–TGT merger collapses that distinction by combining industrial manufacturing depth and supply-chain integration with established customer access across the region. Retailers, food service operators and private-label buyers now have a same-day alternative when Royal A-ware undercuts independent suppliers with volume-backed pricing. Once production economics and local market access sit inside the same platform, scale stops being a defensive necessity and becomes a direct commercial weapon.

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6. Fastnet Fish Adds Value-Added Seafood Manufacturing

Just Food **|** *Read Article*

Fastnet Fish, part of Andrew Marr International, acquired Seafish UK, a supplier of value-added seafood products to retail and foodservice customers. Seafish UK operates a manufacturing facility with three production lines capable of producing approximately three tonnes per day. The acquisition moves Fastnet beyond frozen-seafood sourcing and distribution by adding processing, product-development and prepared-seafood capabilities. Financial terms were not disclosed.

> **SO WHAT:** Fastnet is not buying another seafood distributor; it is buying the conversion step where specification, differentiation and margin are created. Adding value-added processing allows the company to move closer to retailer and food service needs, improve product control and reduce exposure to commodity-trading economics. The broader read-through is that asset-light seafood

> distributors will struggle as customers increasingly demand finished solutions rather than interchangeable frozen fish. Companies that control both raw-material access and processing capability will decide which products reach the market and capture a larger share of the value created.

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7. Apheon Creates a Frozen-Snacks Buy-and-Build Platform

Just Food | *Read Article*

Private-equity firm Apheon acquired Alma, a newly created French frozen-food group combining Foo Seng and Varachaux. Foo Seng manufactures premium frozen Asian snacks, while Varachaux produces frozen meat-based and plant-based components for food manufacturers and foodservice operators. Apheon plans to move the portfolio toward higher-value frozen snacks and halal products, accelerate organic growth and pursue further acquisitions in Europe's fragmented frozen-snacks market. CEO Daniel Coutinho will remain in place and retain a significant stake.

> **SO WHAT:** The real opportunity here is not frozen food itself, but the fragmentation of specialist production capabilities across the category. By combining Asian snacks, halal products and B2B components, Apheon can improve plant utilization, broaden customer access and build a platform for further acquisitions. That raises the competitive floor for independent frozen-food manufacturers, which will need differentiated technology, defensible customer relationships or enough scale to withstand consolidation. The second-order effect is clear: profitable but subscale operators may still become acquisition targets because strategic buyers can create more value from their assets than they can alone.

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8. Bayou Best and BettaF!sh Build a Transatlantic Seafood Portfolio

Just Food | *Read Article*

US plant-based shrimp producer Bayou Best Foods acquired Berlin-based BettaF!sh, which develops seaweed-based tuna and salmon alternatives under products including TU-NAH and SAL-NOM. The combined business brings together Bayou Best's pea-protein shrimp, BettaF!sh's European retail and foodservice relationships and complementary US distribution access. Bayou Best plans to introduce its shrimp products through BettaF!sh's European channels while bringing BettaF!sh products into the US. Financial terms were not disclosed.

> **SO WHAT:** Alternative seafood has spent years proving that products can be made; the unresolved issue is whether the category can be scaled economically. This transaction connects complementary technologies with complementary geographies, giving both businesses broader distribution without duplicating commercial infrastructure. The result should be better plant utilization, faster market entry and a portfolio strong enough to command more retailer attention. The sector implication is that consolidation will become a survival mechanism. Brands that cannot combine differentiated products with credible manufacturing and distribution will remain technically interesting but commercially marginal.

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9. Palacios Acquires Spain’s Leading Packaged-Sandwich Producer

Just Food | *Read Article*

Palacios Alimentación agreed to acquire Grupo Ñaming, a leading Spanish producer of packaged sandwiches, wraps, salads and other ultra-fresh convenience foods. Ñaming operates two plants covering nearly 10,000 square meters and generated more than €55m in 2025 sales after increasing revenue by 50% under its previous owners. Palacios operates 15 production units, sells in more than 50 countries and generates over €450m in revenue. The transaction is expected to close in the third quarter, subject to competition approval.

> **SO WHAT:** Palacios is buying consumption frequency and channel access, not merely a sandwich manufacturer. Ultra-fresh foods deepen exposure to supermarkets, forecourts, vending and foodservice, while the acquired plants add short-lead-time production capabilities that are difficult to build quickly. The combination allows Palacios to spread distribution and customer relationships across a wider prepared-food portfolio. The second-order effect is that fast-growing single-format convenience manufacturers become attractive before they become truly durable. In refrigerated foods, category control will increasingly favor businesses that can combine multiple formats, dense distribution and reliable daily execution.

10. Protein Brewery Raises €48.2 Million to Scale Mycoprotein

NutraIngredients | *Read Article*

The Protein Brewery expanded its Series B round to €48.2m after securing an additional €18m led by ABN AMRO Sustainable Impact Fund. The Dutch company will increase Fermotein production at its Mijkenbroek facility to more than 2,000 tonnes annually and target ready-to-mix powders, bars and functional foods and beverages. Fermotein contains 50% protein and 30% fiber, alongside micronutrients and fungal bioactives. Following EU novel-food authorization, the company will also pursue approvals in Canada, Australia, New Zealand and India.

> **SO WHAT:** The non-obvious read is that fermentation protein has moved beyond proving technical feasibility; it must now prove reliable industrial supply. The funding gives Protein Brewery the capacity and regulatory runway required to enter formulations currently dependent on increasingly expensive whey and other conventional proteins. If Fermotein performs at scale, manufacturers gain another lever for protein, fiber and clean-label reformulation within a single ingredient. The second-order effect is greater pressure on alternative-protein developers without approved products, operating plants or committed customers. Novel science attracts capital, but dependable tonnes win formulation programmes.

11. Döhler Buys Nukoko to Industrialize Cocoa-Free Chocolate

Food Manufacture | *Read Article*

Global ingredients company Döhler acquired UK food-tech start-up Nukoko for an undisclosed amount, providing a commercialisation platform for its cocoa-free chocolate alternative. Nukoko uses European-grown fava beans and a patent-pending “bean-to-bar” process to produce chocolate-like ingredients. Döhler plans to use its global manufacturing, R&D and application network to scale the technology, with customer samples expected from August 2026 across confectionery, bakery, cereals, ice cream, coatings and fillings. The acquisition comes as manufacturers face continued volatility in cocoa availability and pricing.

> **SO WHAT:** Cocoa alternatives are moving beyond experimental food-tech propositions and into the portfolios of established ingredient companies with the infrastructure to industrialise them. The acquisition signals that persistent cocoa volatility is creating a commercially credible market for technologies that reduce dependence on a constrained raw material while preserving familiar sensory performance. Rather than fully replacing cocoa, these platforms could initially gain relevance as formulation tools that provide manufacturers with greater control over cost, supply exposure and product architecture.

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12. Omni Pet Raises £11 Million to Scale Functional Pet Nutrition

Just Food | Read Article

UK plant-based pet-nutrition company Omni Pet raised £11m in Series A funding led by IW Capital and Redrice Ventures, with entrepreneur Deborah Meaden also increasing her investment. The company plans to expand distribution through major UK retailers, assess entry into the US and develop LeanPaws, a non-prescription weight-management supplement for dogs. Omni’s annual revenue has reportedly increased from approximately £1m to nearly £13m. LeanPaws combines fiber, resistant starch, prebiotics and probiotics to support satiety and fat metabolism.

> **SO WHAT:** Omni is using capital to move pet nutrition from general wellness into condition-specific functional products. That matters because weight management, allergies and digestive health support higher differentiation and stronger repeat purchasing than conventional plant-based positioning alone. Retail expansion and US entry could give the company the volume required to commercialize these products across a broader operating base. The second-order effect is that pet-food manufacturers will face increasing competition from science-led platforms combining food, supplements and targeted health claims. The category is moving from feeding animals toward managing outcomes, and that shift changes who controls the margin.

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13. Vitamin Well Integrates Barebells with Its Manufacturing Partner

Just-Food | Read Article

Vitamin Well Group agreed to combine with Belgian nutrition-bar manufacturer EMPWR, a long-standing production partner for its Barebells protein-bar brand. Cinven, Vitamin Well’s existing private-equity owner, will remain the controlling shareholder, while EMPWR owner Waterland will take a minority stake. EMPWR operates as a specialist development and manufacturing organization for nutrition bars. Financial terms were not disclosed, and the transaction remains subject to customary regulatory approvals.

SO WHAT: The non-obvious read is that Barebells is bringing a critical bottleneck inside the business before growth turns it into a constraint. Vertical integration gives Vitamin Well greater control over capacity, formulation, scheduling and innovation speed, while retaining the manufacturing expertise that helped build the brand. This changes the economics for both sides of the contract-manufacturing market. High-performing manufacturers may become acquisition targets, while fast-growing brands will place greater value on secured capacity. In nutrition bars, demand growth only creates value when the operating line can support it without sacrificing service or margin.

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14. Alimentos Sanygran Adds Nutrition & Santé's Spanish Assets

Just-Food | *Read Article*

Spanish plant-based food manufacturer Alimentos Sanygran acquired production assets from Nutrition & Santé, expanding its manufacturing base and product capabilities. The transaction gives Sanygran additional capacity in meat-alternative and nutrition-oriented products while allowing the seller to rationalize its footprint. The acquisition follows continued consolidation across Europe's plant-based sector as manufacturers seek enough scale to improve utilization, reduce production costs and support broader customer portfolios.

SO WHAT: The plant-based sector has moved beyond the phase where growth forecasts could justify every installed asset. Sanygran is acquiring capacity at a point when weaker operators are retreating, allowing it to expand below the cost and risk of building new facilities. If it can combine those assets with real customer demand, the company should improve utilization and unit economics while broadening its manufacturing offer. The wider implication is that excess plant-based capacity will migrate toward disciplined operators. Technology without throughput is not a competitive advantage; it is stranded capital that better-scaled players will acquire cheaply.

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15. Livekindly Buys Greenforce as Plant-Based Consolidation Accelerates

Just Food | *Read Article*

Livekindly Collective acquired German plant-based food company Greenforce, adding its product portfolio, customer relationships and market presence to the group. Greenforce sells plant-based meat alternatives and related products across retail and direct-to-consumer channels. The transaction comes as the European plant-based sector works through weaker growth, fragmented capacity and pressure on profitability. Financial terms were not disclosed.

SO WHAT: The plant-based shakeout is now an operating reality rather than a future scenario. Livekindly is using consolidation to assemble enough brands, manufacturing demand and distribution reach to compete in a category where subscale economics have become unforgiving. Combining Greenforce with a broader platform should improve commercial reach and spread fixed costs across a larger portfolio. The second-order effect is a narrowing path for independent brands: prove repeat demand, secure scaled production or become acquisition inventory. The category still

> has a reformulation runway, but the standalone brand model is no longer protected by market enthusiasm alone.

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16. Solina Acquires Epicurean Butter to Expand Dairy Formulation

Dairy Foods | *Read Article*

Solina acquired US-based Epicurean Butter, a producer of flavored and compound butters serving foodservice, retail, industrial and private-label customers. The transaction expands Solina's North American dairy-formulation capabilities and adds a platform for culinary flavors, portioned products and customised applications. Epicurean Butter operates from Colorado and has built its business around value-added butter formats rather than commodity dairy production. Financial terms were not disclosed.

> **SO WHAT:** Solina is acquiring a formulation platform disguised as a butter business. Compound butters sit at the intersection of dairy, culinary flavour and labor-saving foodservice solutions, allowing Solina to sell higher-value systems rather than individual ingredients. The acquisition also creates another route into private label, industrial applications and customised formats where convenience supports stronger margins. The broader implication is that ingredient suppliers are moving downstream to own more of the customer solution. Commodity processors and narrowly positioned flavour houses will face pressure as integrated platforms combine formulation, manufacturing and application support in one commercial offer.

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17. Fini and ACON Buy Control of YumEarth

Just Food | *Read Article*

ACON Investments acquired a controlling stake in US organic confectionery brand YumEarth, with Spanish candy group Fini joining as a strategic industry partner. YumEarth sells allergy-friendly sweets made without the nine major US allergens and distributes through major retail channels. Financial terms were not disclosed. The transaction gives YumEarth private-equity capital and Fini's confectionery manufacturing, innovation and international-market experience, creating a stronger platform for distribution and product expansion.

> **SO WHAT:** The strategic value here comes from pairing capital with industrial know-how. ACON can fund expansion, while Fini brings confectionery manufacturing, category experience and international distribution that YumEarth would take years to build independently. That combination should accelerate new-product development and market entry without sacrificing the brand's allergy-friendly positioning. The second-order effect is that better-for-you confectionery is moving from founder-led niches into professionally scaled platforms. Smaller brands now face a clear decision window: secure manufacturing and distribution partners early or become acquisition targets once growth begins to strain supply and execution.

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18. WeSports Buys Control of Nordic Sports-Nutrition Specialist

Just Food* | *Read Article

Swedish sports and leisure group WeSports agreed to acquire 65% of Finland's Elite Fitness, owner of the SportLife sports-nutrition brand. Elite Fitness generated approximately €8.2m in revenue during fiscal 2025/26 and reported profitability above WeSports' financial targets. The transaction gives WeSports entry into Nordic sports nutrition, adding supplements and performance products to its existing specialist portfolio. Financial terms have not disclosed, and Elite Fitness' existing management will continue operating the business.

> **SO WHAT:** WeSports is not entering sports nutrition through a speculative product launch; it is acquiring a profitable specialist with established credibility and operating discipline. The deal adds recurring consumable demand to a portfolio otherwise anchored in equipment and sporting goods, improving customer lifetime value and cross-selling potential. Elite Fitness gains access to a larger commercial platform without losing its operating leadership. The broader read-through is that sports ecosystems are converging around equipment, community and nutrition. Standalone specialists will find it harder to compete as larger platforms integrate the products consumed before, during and after participation.

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19. Europastry Buys Two US Plants and a Foodservice Bread Platform

Snack Food & Wholesale Bakery* | *Read Article

Europastry agreed to acquire Highland Baking Company, a family-owned US producer of premium foodservice breads with plants in Northbrook, Illinois, and Spartanburg, South Carolina. Europastry operates in more than 90 countries, employs over 5,500 people and expects combined annual revenue to exceed $2.3bn. Highland will retain its brand and management. Europastry also plans a significant US investment programme to expand capacity, add categories and introduce more of its frozen-bakery portfolio after closing.

> **SO WHAT:** Europastry is buying local credibility, foodservice specifications and two operating plants rather than waiting for a greenfield build to mature. Highland gives the company immediate access to US customers and a domestic base through which it can introduce a broader frozen-bakery portfolio. The combined network should improve utilization, service levels and innovation economics across more categories. The effect is a structural squeeze on regional bakers: customer intimacy remains valuable, but global operators can increasingly acquire that intimacy and support it with greater capital. Local relevance backed by global scale becomes difficult to displace.

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20. CVC Buys Irca After Revenue Quadruples to €1.5 Billion

Food Manufacture* | *Read Article

CVC Capital Partners agreed to acquire Italian food-ingredients manufacturer Irca from Advent International, with completion expected in the fourth quarter of 2026. Irca supplies value-added ingredients and semi-finished products for pastry, bakery, chocolate and ice cream. Under Advent, revenue increased from €370m in 2021 to approximately €1.5bn. The company operates 19 facilities, offers more than 7,000 products and serves customers in over 100 countries. Financial terms were not disclosed.

> **SO WHAT:** Private equity is attracted to Irca because specialist ingredients create sticky customer relationships and high switching costs when they are embedded in recipes and processes. The company's expansion across applications, geographies and product systems shows how quickly a formulation platform can compound once scale is added. Under CVC, the next value-creation phase will depend on integration and cross-selling rather than simple portfolio expansion. The sector consequence is a higher competitive floor for mid-sized suppliers. Customers can increasingly consolidate spend with global solution providers, leaving specialists to defend themselves through proprietary performance and faster technical execution.

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21. La Doria Buys Solana to Control More Tomato Processing

Just Food | *Read Article*

La Doria agreed to acquire 100% of Italian tomato supplier Solana and its subsidiaries from Xenon Private Equity and a minority shareholder. La Doria is a major European supplier of long-life private-label tomatoes, sauces, pulses and pasta. Solana supplies tomato products to manufacturers and foodservice customers. The transaction increases La Doria's industrial tomato-processing capacity, broadens its customer base and expands its geographic footprint. Closing is expected by the end of September 2026, subject to antitrust approvals and other customary conditions.

> **SO WHAT:** La Doria is strengthening control over the variables that matter most in private label: volume availability, specification consistency and supply continuity. Solana adds processing capacity and B2B customer relationships, giving the group more flexibility across retail, food service and industrial channels. The enlarged network should also improve allocation decisions when tomato crops tighten or demand shifts. The broader implication is a more difficult environment for independent processors already exposed to harvest volatility and retailer pressure. Scale will not remove agricultural risk, but it improves the ability to spread costs, secure supply and decide where scarce tonnes generate the best return.

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22. Patanjali Revives a 94-Year-Old Pennsylvania Dairy Asset

Dairy Foods | *Read Article*

Harry Davis & Company sold the former Harrisburg Dairies site to Patanjali Dairy USA after the plant suspended operations in October. The three-acre facility sits in Pennsylvania's capital and had served the local community for 94 years. Its location within the central Pennsylvania milk shed, combined with existing distribution infrastructure, attracted Patanjali, a growing ethnic dairy-foods company. The transaction preserves local dairy-production capability and associated jobs. Financial terms and the buyer's detailed restart timetable were not disclosed.

> **SO WHAT:** Patanjali is using an existing dairy asset to compress the time, cost and regulatory risk of entering a new regional market. The Harrisburg site offers proximity to milk supply, population density and established distribution infrastructure that would be difficult to recreate quickly through

a greenfield project. For the local dairy system, a focused buyer may preserve capacity that a legacy operator could no longer support. The broader read-through is that older plants are not automatically obsolete. Their value depends on product-market fit, location and the new owner's willingness to reinvest, not simply the age of the equipment.

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23. MaserGrup Targets Acquisitions to Double Revenue

Just Food | *Read Article*

Spain's MaserGrup is evaluating acquisitions as it seeks to increase annual revenue from €224m in 2025 to between €400m and €500m within three or four years. The diversified industrial group operates production plants in Spain, Chile and Colombia and includes food-and-beverage manufacturing activities. Management views M&A as a route to accelerate commercial scale, add capabilities and extend geographic reach. No specific targets, transaction values or acquisition timetable were disclosed.

> **SO WHAT:** MaserGrup's target implies that organic growth alone will not deliver the required scale, making acquisitions central to the strategy rather than optional. Buying established businesses can add customers, capabilities and geographic reach faster than building each element internally. The opportunity is real because the food-manufacturing base remains fragmented across many regional specialists. The risk is equally familiar: value comes from integrating procurement, production and sales, not from collecting disconnected companies. The sector implication is that acquisition-ready manufacturers will attract more interest, but only buyers with disciplined operating systems will convert that activity into durable returns.

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24. Orkla Buys TC Brød to Deepen Danish Bake-Off Capability

Just Food | *Read Article*

Orkla Foods agreed to acquire 100% of Danish bakery company TC Brød through Orkla Denmark. TC Brød specializes in laminated dough and seasonal bake-off products and operates production in Krogager. The business generated DKK116m in revenue in 2025. Orkla said the acquisition strengthens its Danish bakery platform and adds complementary production and product capabilities. The transaction requires Danish competition approval and is expected to close by the end of the second quarter of 2027. Financial terms were not disclosed.

> **SO WHAT:** Orkla is acquiring a specialist capability that would take years to reproduce with the same customer credibility. TC Brød adds laminated dough, seasonal bake-off products and local category knowledge to a larger platform capable of funding innovation and expanding distribution. The transaction should improve scale while preserving the production expertise that made the business attractive. The second-order effect is a familiar one for regional bakeries: strong local relevance can become both a defence and an acquisition signal. The durable advantage lies in owning a production capability customers cannot replace easily, not simply in being locally recognized.

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25. UK Clears ABF's Hovis Deal as Bread Economics Deteriorate

Just Food | *Read Article*

The UK Competition and Markets Authority cleared Associated British Foods' acquisition of Hovis after an in-depth review. ABF owns Allied Bakeries and brands including Kingsmill, Allinson's and Sunblest, while Hovis is one of Britain's largest packaged-bread suppliers. The regulator concluded that Allied Bakeries could exit the Great Britain market without the transaction, meaning competition would weaken regardless. The deal brings together two major bakery networks after years of rising costs, falling mass-market bread demand and weak profitability.

> **SO WHAT:** The clearance is less a verdict on market concentration than on the deteriorating economics of packaged bread. Regulators accepted that Allied Bakeries could leave the market without the transaction, meaning consolidation may preserve capacity that weak pricing and falling demand would otherwise remove. ABF gains a broader network and stronger category position, while retailers face fewer national-scale suppliers. The second-order effect will reach smaller bakers through tougher procurement and service expectations. In structurally weak categories, efficiency is no longer a continuous-improvement target; it becomes the minimum condition for remaining commercially relevant.

> **NOW WHAT → FutureBridge:** If you run a bakery, milling or staple-food business, treat this clearance as confirmation that weak category economics are being resolved through consolidation and capacity withdrawal, not gradual margin recovery. Decide which plants, customers and formats remain viable under lower volumes and stronger retailer leverage, then establish firm investment, partnership and exit thresholds. Use FutureBridge's intelligence agency-grade OSINT capability to track permits, closures, hiring, trade activity and restructuring signals, identify where excess capacity and margin pressure are building, and produce a capacity-at-risk map, competitor-response scenarios and a portfolio-restructuring roadmap that directs capital toward defensible occasions and away from structurally impaired assets.

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26. De Cecco Buys RossoGargano to Own the Tomato Chain

Just Food | *Read Article*

De Cecco agreed to acquire full control of Italian tomato producer and processor RossoGargano. The target generated €83m in revenue and €4.5m in profit in 2025 and brings recently upgraded processing and logistics infrastructure. De Cecco expects group turnover to increase from €740m in 2026 to more than €1bn in 2027, while product volume rises from 2.7 million to 4.5 million quintals. The transaction forms part of a €250m investment plan running from 2025 to 2029.

> **SO WHAT:** De Cecco is deciding that control over tomato processing is worth more than the flexibility of buying externally. RossoGargano brings modern infrastructure, logistics capability and raw-material coordination into a broader Italian foods platform. That should improve continuity, quality control and the speed of cross-category expansion. The wider implication is that branded manufacturers will selectively integrate upstream when strategic inputs are exposed to crop volatility or supplier concentration. Processors positioned between agricultural risk and branded demand should take note: the strongest customers may eventually prefer to own both the margin and the operational uncertainty.

27. Vion Sells German Foodservice Plants to Refocus on Benelux

Just Food | *Read Article*

Vion Food Group agreed to sell its German foodservice division to Group of Butchers as the final major step in its German-market exit. The transaction includes Vion Food Service Holding, Salomon FoodWorld, affiliated subsidiaries and production sites in Grossostheim and Holzwickede. The business supplies frozen beef, pork and chicken products across several European markets. Vion will sharpen its focus on the Benelux region, while Group of Butchers gains established products, plants and food service relationships. The deal remains subject to regulatory approval.

> **SO WHAT:** This transaction shows how portfolio focus and consolidation can create value on both sides of an asset sale. Vion is reducing geographic and operational complexity to concentrate on the Benelux, while Group of Butchers acquires established plants, products and food service relationships without building them from scratch. The result could improve capital allocation for the seller and scale economics for the buyer. The broader lesson is that divestment is not automatically strategic retreat. In pressured meat processing, the stronger move may be to exit marginal businesses before they dilute the performance of the core.

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28. Oberweis Owner Adds Cedar Crest's Midwest Ice-Cream Platform

Dairy Foods | *Read Article*

Hoffmann Family of Companies, owner of Oberweis Dairy, acquired Wisconsin-based Cedar Crest Ice Cream. Founded in 1976, Cedar Crest manufactures ice cream, custard, sherbet and sorbet and has a longstanding Midwest customer base. Oberweis CEO Renato DePaolis will lead the acquired business, while Cedar Crest and Oberweis will remain distinct brands. Hoffmann owns more than 200 companies, including Elmer Chocolate. Financial terms were not disclosed.

> **SO WHAT:** The strategic logic is to preserve regional brand equity while combining the industrial capabilities behind it. Cedar Crest contributes Midwest loyalty and frozen-distribution reach, while Hoffmann can add capital, procurement leverage and operating expertise from Oberweis and its wider portfolio. Keeping the brands distinct reduces the risk of destroying the local identity that created value in the first place. The second-order effect is a more viable consolidation model for regional dairy: consumers continue to see heritage, while the owner captures scale. That approach may prove more durable than forcing every acquisition into one national brand.

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29. Orkla Buys 40% of Go-Tan With a Path to 85%

Just Food | *Read Article*

Orkla Foods agreed to acquire a 40% stake in Dutch Asian-sauces producer Go-Tan, with an option to purchase another 45% in 2030. Go-Tan employs approximately 250 people, operates four plants—three in the Netherlands and one in Hungary—and generated more than €92m in 2025 sales with EBITDA above €11m. The founding family will remain the majority owner and active in the business. Go-Tan has strong positions in Northern Europe and faster growth in Spain, France and Italy.

> **SO WHAT:** Orkla is using a staged acquisition to gain access to a profitable growth platform without disrupting the family-led model that created it. The initial stake provides learning, commercial collaboration and strategic influence, while the 2030 option creates a path to control after the integration thesis has been tested. Go-Tan gains capital and broader distribution while retaining entrepreneurial continuity. The broader read-through is that Asian sauces are becoming a mainstream growth category attractive to scaled food platforms. Regional producers now compete against capital that can enter patiently, learn the business and consolidate later.

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30. Schouten Buys Bobeldijk to Fill Plant-Based Capacity

Just Food **|** *Read Article*

Schouten Europe acquired fellow Dutch manufacturer Bobeldijk Food Group to expand production of plant-based meat and seafood alternatives. Both companies supply retail and food service customers, and the transaction significantly increases Schouten's manufacturing capacity and European market position. Financial terms were not disclosed. The acquisition comes as alternative-protein manufacturers confront slower category growth, underutilized plants and pressure to improve unit economics. Schouten plans to combine Bobeldijk's production capabilities with its product-development and international commercial platform. The Omak site employs more than 260 people and produces fruit snacks sold across retail, club, foodservice and e-commerce channels. SunOpta operates seven manufacturing plants across six markets, with fruit snack production on both North American coasts.

> **SO WHAT:** Schouten is addressing the plant-based sector's most immediate structural problem: too much capacity chasing too little repeat demand. Acquiring Bobeldijk allows the group to combine customer portfolios, production assets and development capabilities rather than waiting for category growth to refill underused plants. Better utilization should improve scheduling, overhead absorption and retailer service. The second-order effect is that subscale facilities will continue changing hands as stronger operators consolidate demand around fewer assets. The category does not need more factories; it needs disciplined owners capable of matching capacity with customers and turning technology into throughput.

THEME 2:

Capacity Is Shifting to Higher-Value Assets

31. Mars Opens $112.6 Million Wet Pet-Food Plant

Food & Beverage Industry News* | *Read Article

Mars opened a $112.6 million wet pet-food facility in Wodonga, Victoria, dedicated to cat-food pouches. The plant is designed to produce about 290 million pouches annually, create 67 direct and more than 100 indirect jobs, and lift locally manufactured Mars Petcare products sold in Australia and New Zealand to roughly 90%. The line includes autonomous mobile robots, automated packaging, next-generation cooking and AI-enabled planning. Mars has invested more than $450 million in Australia since 2020.

> **SO WHAT:** The non-obvious read is that Mars is localizing a fast-growing format, not merely adding tonnage. Wet pouches demand specialized cooking, packaging and heat systems, giving the company greater control over service levels and product economics in Australia and New Zealand. Automation and renewable-process heat also lower the operating burden attached to local production. The second-order effect is a higher entry floor for regional competitors and importers. When a scaled producer combines local supply, automated flexibility and energy resilience, imported capacity becomes the slower and less dependable option.

> **NOW WHAT → FutureBridge:** If you run a pet-food brand or manufacturing business, treat this investment as evidence that high-growth segments are now capacity competitions in which freshness, format flexibility and retailer service carry as much weight as brand equity. Determine where owned production creates a revenue advantage and where co-manufacturing protects speed and flexibility, then quantify the margin and time-to-shelf difference. Use FutureBridge's intelligence agency-grade OSINT capability to track permits, hiring, equipment installations, trade flows, supplier activity and pre-announcement expansion signals. Translate the findings into a capacity-gap assessment, partner shortlist and demand-linked manufacturing roadmap that specifies where to build, contract, acquire or defer investment.

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32. Lactalis Commits €50 Million to German Quark Capacity

Just Food* | *Read Article

Lactalis announced an investment of about €50 million at its Neuburg site in Bavaria to expand quark production. The dairy group is targeting annual output of approximately 40,000 metric tonnes of quark and 104,000 tonnes of whey by 2030. The project adds capacity in a protein-rich cultured-dairy format while creating a larger whey stream for further processing and ingredient applications. The investment strengthens Lactalis' German manufacturing base and supports expected demand growth in high-protein dairy.

> **SO WHAT:** Lactalis is placing capital behind a format that monetizes both the finished product and the co-product stream. Quark captures consumer demand for protein-rich dairy, while increased whey volumes create additional value across ingredients and nutrition applications. That two-sided economics makes the plant more attractive than a simple volume expansion. The second-order effect is pressure on smaller cultured-dairy producers that cannot spread investment across consumer brands and ingredient outlets. In dairy, the strongest capacity projects increasingly create several revenue pools from the same milk, raising the return threshold for single-output plants.

NOW WHAT → FutureBridge: If you run a dairy, yogurt or protein-snacking business, read this investment as confirmation that familiar regional foods are being recoded into scalable nutrition platforms when they align with protein, satiety, naturalness and convenience. Identify overlooked formats with permission to stretch into new consumption occasions, then quantify the revenue pool before capacity fills and retailer standards harden. Use FutureBridge's Consumomics framework to mathematically score behavioral demand across consumer genome, occasion, channel and product using public data, identify propositions with durable and profitable demand, and produce an occasion-led category map, innovation pipeline and commercialization roadmap.

33. Years Raises Capital to Add Capacity and Enter Europe

Food Manufacture* | *Read Article

UK pet-nutrition company Years secured a multimillion-pound growth investment from Verlinvest and Five Seasons Ventures. The funding will support additional manufacturing capacity, a broader UK retail rollout and entry into continental Europe, beginning with Benelux. Years' Cupboard Fresh meals use minimally processed ingredients but remain stable for 18 months without refrigeration. The company says it has shipped more than 12 million personalized meals, while 66% of subscribers previously bought conventional kibble or wet food.

SO WHAT: Fresh pet food's biggest constraint is not consumer demand; it is refrigeration. Years' ambient technology removes that constraint, and the new capital gives it the capacity to scale through conventional retail rather than remain dependent on subscriptions and specialist distribution. That widens the addressable market without diluting the health-led proposition. It also puts chilled and frozen competitors at a structural disadvantage: they must carry higher logistics costs to deliver consumer benefits that Years can increasingly replicate on a standard shelf. In pet nutrition, supply-chain convenience is becoming as important as convenience for the owner.

34. Nestlé's £28 Million Upgrade Lifts Coffee Output

Food Manufacture* | *Read Article

Nestlé invested £28 million in its Nescafé factory in Dalston, Cumbria, supporting two new confectionery-inspired frothy coffees. The project added a mixing plant and two high-technology packing lines capable of producing up to 60,000 sachets per hour. Nestlé said the upgrade increased output, improved efficiency and enhanced packaging recyclability. The investment supports its instant-sachet coffee business as UK consumers drink about 98 million cups of coffee daily and 80% of households buy instant coffee for home use.

SO WHAT: Nestlé is using flexible sachet capacity to turn brand collaboration into a repeatable growth system. The value of the investment lies in shortening the path from flavour idea to national-scale output, allowing the factory to support more variants without sacrificing economics. That makes manufacturing flexibility a commercial asset rather than an operations metric. The second-order effect is greater pressure on smaller beverage producers whose plants were designed for long runs and narrow portfolios. In impulse-led beverages, the operator that can industrialize novelty quickly can capture the demand signal before it fades.

NOW WHAT → FutureBridge: If you run a coffee, beverage, or private-label platform, treat this upgrade as evidence that mature categories can create advantage through manufacturing flexibility rather than endless SKU invention. Decide whether your network can support smaller runs, format changes, and retailer launches without destroying margin, then quantify revenue lost through slow service. Use FutureBridge's intelligence agency-grade OSINT capability to track permits, equipment installations, hiring, trade activity, and capacity signals across plants, identify where competitors are building flexibility early, and produce a format-level capacity benchmark, automation actions, and network investment roadmap showing where throughput, sourcing, and speed improvements can unlock retailer programs.

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35. Heler Foods Builds an AI-Controlled Cheese Plant

Dairy Foods* | *Read Article

Heler Foods partnered with Tetra Pak to develop an advanced cheesemaking plant at its Nantwich creamery, scheduled for commissioning by January 2028. The facility will be the first Northern European creamery to install Tetra Pak Factory OS. The system will continuously monitor production data and automatically adjust equipment to improve cheese yield, consistency and operational efficiency. Heler expects the platform to reduce energy, water use and waste while giving the business tighter process control.

> **SO WHAT:** The strategic value is not the software itself; it is the conversion of factory data into yield and consistency at operating speed. Cheese plants carry expensive raw material and energy through every batch, so small improvements compound quickly across volume. Heler gains a platform that can protect margin while supporting growth without relying solely on labour or manual intervention. The broader read-through is that advanced capacity will increasingly be defined by its control architecture, not by installed tonnage. Plants that cannot measure and adjust in real time will become structurally more expensive to operate.

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36. Suntory Modernizes UK Blackcurrant Processing

Food Manufacture* | *Read Article

Suntory Beverage & Food committed £14.5 million to a next-generation blackcurrant-processing facility in Herefordshire with Döhler-owned Bevisol. The project will install vapor-recompression evaporators, cleanable membrane filtration, automated handling and digital tracking for fruit bins. It supports 33 blackcurrant farms across five UK growing regions and will create 12 permanent and 30 seasonal jobs. The investment forms part of Suntory's wider £57.5 million UK supply-chain programme, including a separate £25 million manufacturing line due in 2027.

> **SO WHAT:** Suntory is investing where beverage resilience actually begins: before the concentrate reaches the bottling line. Modernizing blackcurrant processing improves traceability, yield visibility and continuity across a crop exposed to weather and seasonal constraints. The partnership also anchors growers to a domestic industrial outlet, reducing the risk that farming capacity erodes beneath the brand. The broader implication is that strategic beverage ingredients will attract direct

processor investment when their supply base is narrow or geographically concentrated. Brand strength cannot compensate for a fragile raw-material system; the operating line starts in the field.

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37. DFA Closes Vermont Plant and Reroutes Regional Milk

Just Food | *Read Article*

Dairy Farmers of America said it will idle its St. Albans, Vermont, milk-processing plant and close the adjoining creamery and supply store on 17 August. The move affects about 80 employees. The facility processes milk into cream, condensed products and powders and handles a significant share of Vermont's output. DFA said regional farmers' milk will continue moving through its plants in New York, Massachusetts and Maine as part of broader network changes.

> **SO WHAT:** The closure shows the difference between milk availability and economically viable processing. DFA can preserve farmer collection by rerouting volume, but Vermont loses local conversion capacity, jobs and flexibility. That shifts more milk across longer distances and concentrates dependence on fewer plants outside the state. The second-order effect is a weaker regional dairy ecosystem even when farm supply remains intact. Once processing leaves, attracting differentiated brands and rebuilding industrial capability becomes harder. For cooperatives, network efficiency can protect aggregate economics while still hollowing out strategically important local infrastructure.

> **NOW WHAT → FutureBridge:** If you run a dairy processor, retailer or milk-dependent manufacturing business, treat this closure as evidence that food systems are losing redundancy as volume concentrates into fewer processing hubs. Map every point where supply security depends on one plant, hauling corridor, cooperative or buyer, then quantify the revenue and service exposure created by each dependency. Use FutureBridge's intelligence agency-grade OSINT capability to track plant permits, closures, trade activity, cooperative moves and restructuring signals, identify emerging regional failure points, and produce a commercial milk-flow vulnerability map, early-warning system and regional sourcing and contingency strategy that specifies where to diversify, reserve capacity, redesign routes and renegotiate commitments.

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38. Schwebel Liquidates as Legacy Bakery Economics Break

Just Food | *Read Article*

Schwebel Baking Company announced plans to liquidate after 120 years when it failed to secure new financing or a buyer. The Ohio baker planned to operate through the Fourth of July weekend before winding down sales and distribution. State filings indicated 673 jobs would be affected, including operations in Youngstown and Hebron. The company cited ageing facilities and equipment, labour and pension costs, inflation and weaker demand for traditional bread products as barriers to a sustainable path.

> **SO WHAT:** Schwebel's failure is not a heritage story; it is a warning about deferred reinvestment in a fixed-cost category. A recognised regional brand and retailer relationships could not offset ageing assets, labour obligations and declining demand. The closure removes supply from the market, but it also hands remaining bakers' volume without guaranteeing that category economics improve. The

broader read-through is that mature staples can tolerate underinvestment for years before the correction arrives all at once. When plants lose efficiency and portfolios lose relevance together, there is rarely enough margin left to finance the recovery.

39. Hotpack and HZ Build a Global Paper-Packaging Platform

Packaging Insights | *Read Article*

Hotpack and Malaysia's HZ Corporation formed a joint venture to expand paper-based foodservice packaging. The initial portfolio includes paper cups, folding cartons, paper bags and related formats for quick-service restaurants, coffee chains, airlines, caterers and delivery platforms. The venture combines Hotpack's Middle East and global distribution network with HZ's Southeast Asian manufacturing base and dry-molded-fiber expertise. Hotpack had separately invested $100 million in a 70,000-square-foot US packaging facility the previous year.

SO WHAT: The partnership addresses the central weakness in sustainable packaging: good technology without enough commercial reach. HZ contributes manufacturing expertise, while Hotpack brings customers and distribution across several high-growth regions. That combination can move paper alternatives from pilot programmes into dependable supply contracts. The second-order effect is a tougher market for packaging innovators that lack either industrial capacity or multinational sales coverage. Regulation may create demand, but buyers will award volume to suppliers that can certify, manufacture and deliver consistently. Sustainability only becomes structural when the operating economics work at scale.

40. Good Culture Secures Dedicated Cottage-Cheese Capacity

Dairy Foods | *Read Article*

Good Culture partnered with Michigan Milk Producers Association to establish a dedicated cottage-cheese production facility in Remus, Michigan. The site was launched in May 2026 after MMPA acquired the facility for the initiative. Good Culture said its sales had nearly quadrupled in three years while the cottage-cheese category grew almost 60%. The plant will produce the company's full cottage-cheese portfolio, drawing on nearby member-farm milk and farmer-backed capital to support national distribution and additional jobs.

SO WHAT: Good Culture has reached the point where shared capacity can no longer guarantee the control required for national growth. A dedicated plant secures milk, production time and quality standards while preserving the cooperative model rather than forcing a full asset build by the brand. MMPA gains a higher-value outlet for member milk tied to a fast-growing protein category. The broader read-through is that breakout dairy brands will increasingly lock in capacity before demand peaks. In refrigerated categories, shelf growth becomes fragile when manufacturing remains discretionary inside someone else's network.

41. Nestlé Opens $330 Million Automated Distribution Centre

Dairy Foods | *Read Article*

Nestlé USA opened a $330 million, 700,000-square-foot distribution center in Arvin, California, its largest and most technologically advanced. The facility supports brands including Toll House, Coffee mate and Gerber and creates more than 110 skilled jobs. It includes the largest automated storage-and-retrieval system in Nestlé's global network and is designed to manage peak-season demand with greater accuracy. The project forms part of Nestlé's $25 billion US investment programme launched in 2020.

> **SO WHAT:** Nestlé is treating distribution capacity as part of manufacturing strategy, not as a downstream warehouse decision. Automated storage and flexible handling allow a broad portfolio to move through fewer errors, faster peaks and more precise inventory deployment. That raises the value of the entire production network because factories can run against a more capable outbound system. The second-order effect is higher service expectations for competitors and suppliers across the West Coast. A plant can manufacture efficiently and still lose the shelf if the network cannot deliver with equal precision. Capacity ends when the customer receives the product.

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42. JBS Shuts Two US Plants as Cattle Supply Tightens

Just Food | *Read Article*

JBS USA announced the closure of a beef-processing plant in Souderton, Pennsylvania, and a value-added facility in Memphis, Tennessee. The sites employed roughly 1,700 and 200 people respectively, with production to be absorbed elsewhere in the network. The Souderton plant processed about 2,000 cattle per day. The closures came as the US cattle herd remained near multi-decade lows, while JBS continued investing in larger and more value-added operations, including a $150 million project in Cactus, Texas.

> **SO WHAT:** JBS is removing capacity built for a cattle supply that no longer exists while continuing to fund assets with better scale or value-added economics. That is not indiscriminate cost cutting; it is a network reset forced by structural raw-material scarcity. Consolidating production may improve utilization, but it also increases concentration and execution risk at the plants receiving transferred volume. The broader implication is that protein processors cannot treat livestock supply and factory footprint as separate planning exercises. When the herd contracts, underutilized slaughter capacity becomes a balance-sheet problem long before consumer beef prices signal relief.

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43. Mondelēz Invests $8 Million in Flexible Packaging

Food & Beverage Industry News | *Read Article*

Mondelēz International invested $8 million in new production and packaging technology at its Scoresby confectionery factory in Victoria. The site produces more than 120 products, including Cadbury Pascall Clinkers, Sour Patch Kids and The Natural Confectionery Company lines. The equipment adds flexibility across formats such as portioned mini bags and forms part of more than $30 million invested at Scoresby since 2022. Mondelēz expects half of its growth by 2035 to come from non-chocolate categories.

> **SO WHAT:** Mondelēz is investing in format flexibility because confectionery growth increasingly comes from pack architecture as much as recipe innovation. A line capable of switching among more products and portion sizes can respond faster to retailer requests, social-media trends and affordability pressure. That gives the plant a wider commercial role across both chocolate and non-chocolate growth. The second-order effect is that older single-format assets will struggle even when category demand remains healthy. In snacks, the winning capacity is not simply the line that runs fastest; it is the line that can change mix without destroying margin.

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44. Killer Brownie Nearly Triples Its Facility Footprint

Snack Food & Wholesale Bakery | Read Article

Killer Brownie announced a new headquarters and expanded operations facility in Ohio, increasing its footprint from about 50,000 to 140,000 square feet. The brand, now sold in more than 10,000 retail locations, plans to bring its team under one roof while adding capacity for national demand. The project received approval for an Ohio tax credit, with JobsOhio support expected after final agreements. Irresistible Foods Group, whose portfolio includes Grillo's and King's Hawaiian, invested in the business with the founding family in 2024.

> **SO WHAT:** Killer Brownie is converting retail momentum into an operating base large enough to support the next growth phase. Consolidating teams and nearly tripling the footprint should improve coordination between innovation, production and commercial expansion while reducing the friction of fragmented operations. The investment also shows how strategic backing can help a regional product become a national platform without abandoning its origin. The broader implication is that emerging snack brands must build infrastructure before distribution outruns execution. Retail doors create demand; capacity, quality and organizational control determine whether those doors stay open.

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45. Biospringer Buys PTX Fermentation Assets to Move Beyond Yeast-Based Ingredients

Food Ingredients First | Read Article

Biospringer by Lesaffre expanded its fermentation capabilities by acquiring bacterial fermentation technologies and intellectual property from PTX Food Corp. The transaction gives Biospringer access to capabilities beyond its traditional yeast-based ingredient platform. The acquired assets include technologies linked to bacterial fermentation and the Bioenhance product line. Biospringer said the move strengthens its ability to develop tailored ingredient solutions for food manufacturers. The acquisition combines Biospringer's global industrial fermentation network with additional microbial expertise. The deal supports the company's ambition to broaden from yeast extracts into a wider set of next-generation fermented ingredients for taste, functionality and food innovation.

> **SO WHAT:** The scarce asset in clean-label formulation is no longer the ingredient; it is the microbial platform that can create it. Biospringer's acquisition expands that platform from yeast into bacterial fermentation, increasing the range of taste, preservation, nutrition and functionality challenges it can solve for customers. This gives the company greater influence over formulation

> choices while supporting cleaner labels, natural positioning and greater product flexibility. The deal also reflects a wider M&A shift: ingredient companies are buying the technologies that determine future product development, not simply adding finished solutions to their portfolios. Fermentation IP is becoming the new gatekeeper of clean-label formulation, and suppliers without it are already negotiating from a weaker position.

THEME 3:

Compliance Is Becoming an Operating Constraint

46. Victoria Consolidates Food Oversight Around 12,000 Producers

Food & Beverage Industry News **|** *Read Article*

Safe Food Victoria began operations as a single regulator overseeing approximately 12,000 food producers. The agency consolidates Dairy Food Safety Victoria, PrimeSafe and other regulatory functions while working with local governments on enforcement. The state expects the structure to reduce administrative complexity without weakening technical oversight or consumer protection. No redundancies are planned. Further reforms will modernize legislation, clarify responsibilities and give regulators more flexible tools for emerging food-safety risks.

> **SO WHAT:** Consolidating regulators should reduce duplicated administration, but it also gives the state a clearer view across dairy, meat and other production systems. That makes inconsistent standards between business units harder to hide and enforcement easier to coordinate. Manufacturers may gain a simpler interface, yet the price of that simplicity will be greater transparency and more uniform expectations. The broader read-through is that regulators are moving from fragmented product oversight toward integrated risk management. Businesses operating several sites or categories will need one defensible compliance architecture, not separate practices built around whichever agency previously inspected the plant.

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47. Canada Launches a Competition Review of Its Food Chain

Just Food **|** *Read Article*

Canada's Competition Bureau launched a market study into competition across the food supply chain after citing sharp increases in food prices and the pressure placed on households. The review will examine structural barriers, market concentration and the conditions affecting competition among participants across production, processing, distribution and retail. The study follows earlier scrutiny of grocery competition but extends the lens across a broader chain rather than focusing only on supermarkets.

> **SO WHAT:** Processors should not assume this remains a retail investigation. Once regulators examine the full chain, contracts, exclusivity, pricing benchmarks and barriers to new manufacturing capacity all enter the frame. Large companies may face questions over bargaining power, while smaller suppliers will be expected to demonstrate that concentration—not weak productivity—is restricting competition. The broader read-through is that affordability policy is moving beyond consumer prices toward the structure that creates them. Businesses should understand where their commercial practices improve efficiency and where they merely protect incumbency, because regulators will increasingly ask them to prove the difference.

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48. Egg Producers Settle Benchmark-Manipulation Claims

Just Food **|** *Read Article*

The US Department of Justice and 17 state attorneys general reached settlements with Cal-Maine Foods, Versova-linked entities and Hickman's Egg Ranch over allegations that they coordinated bids submitted to an egg-price reporting service between June 2022 and March 2025. The government argued the conduct helped inflate a benchmark used by grocery, restaurant and food-manufacturing buyers. The producers agreed collectively to donate more than 53 million eggs to food banks and community organizations and pay approximately $3.3 million.

> **SO WHAT:** This case shows why benchmark governance matters as much as physical supply. When a quoted index influences billions of eggs, manipulating the inputs can move prices across retail, food service and industrial purchasing without altering production costs. The settlement will push buyers to scrutinize how commodity references are constructed and whether contracts rely too heavily on a single reporting mechanism. The second-order effect may be more diversified pricing formulas, stronger audit rights and greater use of cost-based or negotiated structures. A benchmark is useful only while the market trusts the behavior behind it.

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49. Lactalis Pays A$59,400 Over "Fresh" Milk Claims

Just Food **|** *Read Article*

Lactalis Australia paid A$59,400 after the Australian Competition and Consumer Commission issued three infringement notices concerning two two-liter milk products marketed as "fresh." The regulator alleged the products contained substantial quantities of reconstituted powdered ingredients, making the presentation misleading. The action focused on claims attached to mainstream liquid milk rather than a specialized functional product, demonstrating that familiar descriptors remain enforceable when processing methods do not match consumer expectations.

> **SO WHAT:** The fine is small; the precedent is not. "Fresh" carries an implicit processing promise, and regulators are showing that familiar language can create measurable legal exposure when the formulation tells a different story. Dairy manufacturers using reconstituted inputs must align naming, imagery and ingredient disclosure rather than relying on consumers to separate technical compliance from ordinary meaning. The broader implication extends well beyond milk: claims such as natural, traditional and minimally processed will attract the same scrutiny. Marketing language is becoming part of the production specification, not decoration added after the product is made.

> **NOW WHAT → FutureBridge:** If you run a food or beverage portfolio, treat this penalty as evidence that claims governance is now a revenue capability rather than a legal afterthought. Audit freshness, origin, naturalness and processing claims against evidentiary strength and consumer value, then remove language whose premium upside fails to justify enforcement, re-labelling and retailer risk. Use FutureBridge's intelligence agency-grade OSINT capability to track regulatory submissions, enforcement patterns, retailer reactions and competitor claim changes, identify claims already moving into the enforcement zone, and produce a claims-risk heatmap, substantiation standard and packaging framework showing which claims to defend, modify, localize or remove while protecting conversion and speed to market**.**

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50. Danone Challenges Chobani's 20-Gram Protein Claim

Just Food **|** *Read Article*

Danone sued Chobani in a New York federal court over protein claims on 32-ounce tubs of Chobani 20G Protein Greek Yogurt. Danone alleged Chobani used a 6.7-ounce serving size rather than the

5.3-ounce reference amount generally used for multi-serve yoghurt, allowing it to state 20 grams of protein instead of approximately 18 grams. Chobani rejected the allegations. The dispute comes as both companies compete aggressively in high-protein yoghurt, a segment supported by fitness, satiety and GLP-1-related demand.

SO WHAT: Two grams of protein would once have been a rounding argument. Now it is a category-control dispute because protein has become the purchase driver, price justification and shelf-navigation tool. The case will force manufacturers to align serving-size choices with both technical rules and competitive claims. The second-order effect will be more legal scrutiny across functional foods where small differences in protein, fiber or probiotics carry oversized marketing value. Brands cannot build the proposition first and rationalize the calculation later. In performance nutrition, the number on the front of pack increasingly has to survive a courtroom, not just a consumer test.

NOW WHAT → FutureBridge: If you run a high-protein dairy or nutrition brand, read this dispute as evidence that claims competition has shifted from the biggest number to the most defensible comparison. Stress-test serving sizes, nutrient equivalence, substantiation and shopper interpretation before competitors turn minor label differences into shelf disruption, then quantify the revenue dependent on each hero claim. Use FutureBridge's Consumomics framework to mathematically score behavioral demand across consumer genome, occasion, channel and product, measure how trust affects conversion, and produce a claims architecture, reformulation priorities and retailer-engagement playbook that strengthens differentiation without increasing commercial exposure.

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51. Lactalis Takes Nutri-Score Challenge to Europe's Top Court

***Just Food* |** *Read Article*

France's Council of State referred Lactalis' challenge to amendments to the Nutri-Score system to the Court of Justice of the European Union. The dairy group disputes changes to the front-of-pack nutrition algorithm and their application to products in its portfolio. Nutri-Score ranks foods from A to E using nutritional composition, and several European countries support the voluntary scheme. The referral elevates the dispute from a national administrative challenge to a test of how nutrition-rating systems interact with EU law.

SO WHAT: The dispute is about who controls the commercial meaning of nutritional quality. A single algorithm can reshape category perception, reformulation priorities and promotional freedom across markets, even when participation is formally voluntary. Lactalis is challenging the system because an unfavorable rating can become a de facto market penalty before the product fails any legal standard. The second-order effect will be more investment in algorithm-aware reformulation and more litigation where scoring models produce category-wide disadvantages. Companies must understand not only what the law permits, but how quasi-regulatory labels translate permitted products into commercially weaker ones.

NOW WHAT → FutureBridge: If you run a European food or dairy portfolio, treat this referral as confirmation that front-of-pack systems will remain fragmented, contested and commercially consequential. Do not apply one Europe-wide reformulation response. Model how each scoring regime changes retailer access, pricing power, brand equity and SKU economics in every market.

Use FutureBridge's intelligence agency-grade OSINT capability to track regulatory filings, court activity, retailer adoption and policy signals, identify where regulation is already changing commercial outcomes, and produce a country-level exposure model and roadmap showing where to reformulate, relabel, reprice, reposition or withdraw products according to revenue at risk and regulatory momentum.

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52. Western Australia Adds 200 Million Containers to Deposit Scheme

***Food & Beverage Industry News* | Read Article**

Western Australia expanded its Containers for Change programme from 1 July 2026 to include wine and spirit bottles. Almost all beverage containers between 150 milliliters and three liters now qualify for a ten-cent refund, adding an estimated 200 million containers annually. Since 2020, the scheme has collected more than 5.4 billion containers and lifted the state's recovery rate from 34% to above 65%. New suppliers receive up to three years to change labels, while certain cellared products may receive up to ten years.

> **SO WHAT:** Deposit schemes turn packaging from a disposal issue into a funded reverse supply chain. Wine and spirits producers now inherit registration, financing, labelling and data obligations that soft-drink businesses have already learned to manage. The transition periods reduce immediate disruption, but they also create portfolio complexity across old stock, cellared products and newly compliant packs. The broader implication is that beverage companies must treat recovery systems as part of market access, not as a sustainability programme managed at arm's length. The producers with cleaner packaging data and fewer container formats will carry the lowest compliance burden.

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53. Clover Hill Recalls All Cheese After Deadly Listeria Outbreak

***Just Food* | Read Article**

Clover Hill Dairy expanded its recall to every cheese produced at its Mechanicsville, Maryland, facility following a multistate Listeria monocytogenes outbreak. The products included requesón, cuajada and hard cheeses sold under Clover Hill, and several relabeled brands. At the time of the expanded action, nine illnesses, eight hospitalizations and one death had been reported. Maryland suspended the plant's operating license on 30 May, while the FDA and state authorities continued investigating the contamination source and distribution network.

> **SO WHAT:** The critical failure was not confined to one batch or label; it spread across a facility and a network of brands, turning a plant problem into a market-wide recall. Co-manufacturing and relabeling increase utilization, but they also multiply exposure when traceability and environmental controls fail. The second-order effect will be tougher customer audits of shared dairy plants, particularly for high-moisture and Hispanic-style cheeses with known Listeria risk. Retailers will want proof that sanitation, zoning and brand-level traceability work before an incident, because after contamination begins, the customer's label offers no protection from the manufacturer's operating failure.

54. Nara Recalls All Formula After Three Botulism Cases

Just Food **|** *Read Article*

Nara Organics recalled all lots of its Whole Milk Organic Powdered Infant Formula after three infants in California, Pennsylvania and Washington developed botulism following consumption of the product. The affected 400-gram and 700-gram packs were sold through Target, Target.com and Nara's website. All three infants were hospitalized. No formula had tested positive for *Clostridium botulinum* when the recall was announced, but the company withdrew every product on the market as a precaution while FDA and CDC investigations continued.

> **SO WHAT:** Infant formula operates with almost no tolerance for uncertainty, which is why epidemiological linkage alone triggered a nationwide withdrawal. For smaller entrants, one event can erase trust faster than brand growth can rebuild it, even before contamination is confirmed. The broader implication is that premium positioning and imported manufacturing do not reduce the need for supplier-level visibility into powders, processing environments and release testing. Formula companies must know where every high-risk input originated and how quickly it can be isolated. In this category, precaution is not reputational overreaction; it is the minimum acceptable operating response.

55. Ferrero Pulls Nutella Croissants Over Metal Risk

Food Manufacture **|** *Read Article*

Ferrero UK recalled specific four-pack batches of frozen Nutella Croissants because they could contain metal fragments. The UK recall covered batch codes L126Z39 and L127Z39 with best-before dates of 6 and 7 May 2027. Ferrero also recalled specified Nutella Croissant and Nutella Muffin batches across Belgium, Germany, Hungary, Italy, Romania and Spain. The company said no other Ferrero products were affected. Consumers were instructed not to eat the products and to follow local return guidance.

> **SO WHAT:** Foreign-body recalls expose the limits of end-of-line inspection when the root cause sits upstream in equipment, components or contract production. Ferrero contained the event to specific batches, but the multi-country reach shows how one production failure can travel through a regional distribution system before detection. The second-order effect will be greater emphasis on preventive maintenance, detector verification and common recall data across markets. Long shelf-life frozen products increase the challenge because affected stock may remain in warehouses and homes for months. Traceability must move faster than the inventory it is trying to recover.

56. Court Overturns $60 Million Mead Johnson Formula Verdict

Just Food **|** *Read Article*

An Illinois appellate court overturned a $60 million jury award against Mead Johnson and ordered a new trial. The case was brought by Jasmine Watson after her premature infant son died from necrotizing enterocolitis following use of Enfamil Premature formula. The appeals court ruled the jury had been improperly instructed that Mead Johnson owed a direct warning duty to the mother; it said any duty ran through the treating physician. The litigation forms part of a broader group of claims against Mead Johnson and Abbott over cow's-milk-based premature-infant formulas.

SO WHAT: The verdict reversal changes the legal route, not the underlying commercial exposure. Formula manufacturers still face litigation over whether risk communication, clinical evidence and product design adequately address vulnerable premature infants. The second-order effect will be heavier investment in medical-channel education, warning governance and evidence documentation even when courts narrow direct liability. Companies cannot treat a favorable procedural ruling as scientific vindication. In high-risk nutrition, litigation becomes a parallel regulatory system: juries, clinicians and courts test the same product claims from different angles, and each forum can reshape the economics of the category.

NOW WHAT → FutureBridge: If you run infant formula, medical nutrition or another high-trust category, read this reversal as proof that legal outcomes and market trust move on different timelines. Build one integrated evidence-risk model covering litigation, clinical practice, regulatory interpretation, retailer response and caregiver confidence, then quantify the revenue exposed even under favorable judgments. Use FutureBridge's intelligence agency-grade OSINT capability to track court filings, regulatory submissions, advocacy activity, clinical guidance, retailer signals and pre-announcement legal developments, identify where stakeholder confidence diverges from legal liability, and produce a stakeholder-risk map, escalation framework and trust-recovery program linking evidence, communication and channel action to measurable revenue protection.

THEME 4:

Factories Are Moving Toward Traceable Control

57. Cargill's AI System Lifts Beef Yield by 0.5%

***Food Processing* | Read Article**

Cargill's proprietary CarVe system uses cameras and AI to monitor beef-cutting performance and provide immediate operator feedback. The system has increased meat yield per animal by an average of 0.5% by identifying residual meat that would otherwise move into lower-value uses or waste. CarVe operates at plants in Texas, Colorado, Kansas and Alberta, with expansion planned in Ontario. Cargill is also evaluating applications in foreign-object detection, sanitation verification, food safety, animal welfare and employee training.

> **SO WHAT:** The non-obvious read is that AI is becoming a yield-management system rather than another reporting tool. A 0.5% improvement looks small until it runs across thousands of carcasses in a market with the smallest cattle herd in decades. Real-time correction captures value before meat leaves the operating line and reduces dependence on knowledge held by experienced cutters. The broader implication is that proprietary process data will increasingly separate efficient protein plants from the rest. Automation that only removes labour is useful; automation that continuously improves yield resets the cost curve.

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58. Körber Builds Traceability Around FDA's 24-Hour Deadline

***Food Engineering* | Read Article**

Körber launched STEPLogic Tracker to help mid-sized food manufacturers prepare for the FDA Food Traceability Rule under FSMA Section 204. The app-based system captures critical tracking events and key data elements linked to traceability lot codes across receiving, transformation and shipping. Covered businesses must make records available to the FDA within 24 hours of a request. The current compliance date is 20 July 2028, giving manufacturers a defined window to replace fragmented spreadsheets and paper records with lot-level food genealogy.

> **SO WHAT:** Traceability is moving from a recall-support function into core production infrastructure. The 24-hour requirement means manufacturers can no longer reconstruct product history after an incident by calling plants, suppliers and warehouses. They need the genealogy before the regulator asks. The second-order effect will be commercial as much as legal: retailers and brand owners will increasingly favor partners that can isolate affected lots without stopping entire networks. Smaller manufacturers still have a decision window, but it is closing. The firms that digitize early will protect continuity; the rest will discover that poor records convert narrow recalls into broad shutdowns.

> **NOW WHAT → FutureBridge:** If you are a U.S. food supplier, treat 24-hour traceability as a condition of customer access rather than a future compliance obligation. Simulate one recall across suppliers, plants, logistics partners and customers, then quantify the revenue exposed wherever lot genealogy cannot be reconstructed within the required window. Use FutureBridge's TerraCaptus pattern-recognition capability to map traceability architectures, providers and deployments across large patent sets, reveal strategic moves absent from financial reporting, and produce a target architecture, vendor shortlist and phased investment roadmap tied to retailer retention, recall liability, operating continuity and the revenue value of preferred-supplier status.

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59. Intelligent Sensors Shift Plants From Reactive to Predictive

Food & Beverage Industry News **|** *Read Article*

SICK outlined how intelligent sensors, machine vision and connected automation are being deployed across food production and logistics. Its systems support predictive maintenance, label and expiry-date verification, container-contamination detection, barcode and RFID traceability and automated pallet inspection. SICK's pallet system uses 3D vision and AI to identify defects before pallets enter automated handling, including missing wood areas as small as one square centimeter and cracks measuring three by three millimeters. The company operates in approximately 40 countries.

> **SO WHAT:** The strategic shift is from automating individual machines to making the entire plant visible and actionable in real time. Sensors now protect uptime, product integrity and warehouse flow simultaneously, which means the value sits in connected decisions rather than isolated devices. The broader read-through is that highly automated facilities become less tolerant of weak inputs, damaged pallets or unreadable codes because one defect can interrupt an entire system. Manufacturers that digitize only the production line and ignore intralogistics will automate themselves into new bottlenecks. Predictive control must extend from raw material to finished load.

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60. Heat and Control Automates Metal-Detector Verification

Food & Beverage Industry News **|** *Read Article*

Heat and Control introduced the CEIA THS/210-MBH9 metal detector for wet, high-washdown food environments. The system uses multi-spectrum technology to compensate for variations in moisture, salt, temperature and density, reducing false rejects and unnecessary stoppages. Its IP69K-rated AISI 316L stainless-steel construction supports intensive sanitation. An Auto-QC function simulates ferrous, non-ferrous and stainless-steel test pieces to verify performance without manual testing or production interruption. Target applications include meat, seafood, dairy, ready meals and plant-based proteins.

> **SO WHAT:** The important advance is not simply better detection; it is the removal of the trade-off between verification and throughput. Traditional checks interrupt production and depend on operators executing the procedure correctly, while automated verification creates a continuous evidence trail. That changes quality control from a scheduled task into an embedded operating function. The second-order effect will be higher customer expectations for documented detector performance, especially in wet products where false rejects have historically weakened sensitivity. Plants that cannot verify controls without slowing the line will carry structurally higher labour, waste and compliance cost.

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61. Beamex Cuts Calibration Time by Up to 75%

Food & Beverage Industry News **|** *Read Article*

AMS Instrumentation highlighted Beamex's digital calibration ecosystem, which combines management software with portable devices such as the MC6 multifunction calibrator. Technicians receive guided test points, while the system calculates errors, records results and generates digital certificates without handwritten notes or manual tolerance calculations. One customer reported reducing calibration time by 75%. The system covers instruments used for flow, pH, conductivity and other sanitary applications, supporting product consistency, audit preparation and proof that equipment remains within specification.

> **SO WHAT:** Calibration rarely receives strategic attention until a plant cannot prove that a critical instrument was accurate. Yet small measurement errors alter recipes, yield, texture and shelf life long before they trigger a visible breakdown. Digital calibration reduces both maintenance time and the evidentiary risk attached to paper records. The broader implication is that process accuracy is becoming auditable at the same level as food safety. Manufacturers that continue relying on handwritten certificates may still make acceptable products, but they will struggle to prove control when customers, regulators or insurers challenge the operating history.

62. Amcor Replaces Nine Meat-Packaging Machines With Three

Packaging Insights* | *Read Article

Amcor installed three Moda Vac rotary vacuum chamber sealing systems at Barra Mansa Alimentos' new Brazilian deboning line. The equipment replaced as many as nine belt chamber machines and was supplied alongside packaging materials and technical service. Barra Mansa reported improved productivity, vacuum performance and operational consistency following installation. Amcor said the project supports its Latin American expansion and demonstrates an integrated model combining machinery, flexible packaging and applications expertise rather than supplying packaging material alone.

> **SO WHAT:** The commercial value lies in collapsing equipment complexity while improving the pack itself. Replacing nine machines with three reduces maintenance points, labour interfaces and floor-space pressure, while stronger vacuum performance supports shelf life and product quality. The broader read-through is that packaging suppliers are moving deeper into process engineering because the customer problem begins before the film reaches the sealing station. Equipment-only and material-only vendors will face pressure from integrated platforms that can guarantee the full product-to-pack outcome. The supplier that controls more of the line will capture more of the value.

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63. Conveyor Design Becomes a Yield-Control Decision

Snack Food & Wholesale Bakery* | *Read Article

Ammega argued that higher bakery line speeds are making conveyor design a critical determinant of yield and product quality. Belt friction, surface release, transfer distances, speed alignment and product spacing affect whether dough stretches, cookies break or coated products smear. Poor release also increases residue, cleaning frequency, downtime and food-safety risk. The article recommends application-specific designs based on product behavior rather than using one standard conveyor configuration across dough, crackers, pastries and enrobed products.

> **SO WHAT:** Bakeries have historically concentrated investment around mixers, ovens and forming equipment while treating conveyors as connective hardware. At higher speeds, that hierarchy no longer holds. A badly engineered transfer can destroy the yield created by every expensive machine upstream, turning throughput gains into breakage and waste. The second-order effect is

> that conveyor design must move into the original process specification rather than being solved after commissioning. Plants that chase faster lines without stabilizing product movement will manufacture more defects per hour. Speed creates value only when the product survives it.

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64. Summit Scales Cheese Shredding Without Sacrificing Uniformity

***Food & Beverage Industry News* |** *Read Article*

Summit Food Machinery introduced the FAM Centris 400C, a high-capacity slicer and shredder for cheese, fruit and vegetables. Its 16-station cutting head increases throughput while maintaining uniform dimensions across mozzarella, cheddar, provolone, processed cheese and plant-based alternatives. Interchangeable cutting heads support rapid format changes, while the motor and drive remain outside the cutting zone to reduce heat, melting and caking. Stainless-steel construction and removable components support sanitation, maintenance and compliance with European food-equipment standard.

> **SO WHAT:** In shredded cheese, cut consistency determines more than appearance; it affects melt performance, portion accuracy, packaging flow and customer yield. Higher-capacity equipment therefore creates value only when it preserves uniformity across long runs and multiple cheese types. The ability to change cutting heads quickly also makes one asset commercially useful across a broader portfolio. The wider implication is that processors will increasingly favor flexible machines that protect downstream performance rather than simply maximize kilograms per hour. A poor shred transfers cost into cooking, filling and customer complaints. Precision at the cutting stage protects the entire value chain.

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65. Multi-Conveyor Automates Product Singulation Across Pack Sizes

***Snack Food & Wholesale Bakery* |** *Read Article*

Multi-Conveyor developed a 60-inch stainless-steel rotary unscrambling table for empty containers used in brownies, biscotti and snack mixes. Deflector arms guide clustered containers into a single file before transferring them onto an existing conveyor. The system can handle container sizes from 16 to 144 ounces, ranging from four to six inches in diameter and four to 11 inches high, without mechanical changes to the rotary table. Features include variable-speed control, adjustable rails and pre-wired electrical components.

> **SO WHAT:** This is a small piece of equipment solving a large source of operating friction: unstable product flow between manual staging and automated packing. The broad size range allows one table to support several formats without lengthy mechanical changeovers, improving asset utilization and reducing the risk that packaging variety fragments the line. The second-order effect is greater pressure to automate the unglamorous transition points that still depend on manual correction. Manufacturers often invest in fast primary equipment while leaving accumulation and singulation as weak links. A line only runs as reliably as its least organized transfer.

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66. Oil-Free Compressed Air Becomes a Product-Safety Control

Food & Beverahe Industry News **|** *Read Article*

CAPS Australia outlined oil-free centrifugal compressor systems from Ingersoll Rand for food and beverage plants. Oil-lubricated equipment can create carryover that requires additional filtration and raises contamination and recall risk. The MSG Turbo Air NX range spans 600 kW to 4,200 kW and can deliver up to 560 cubic meters per minute, with up to 5% lower specific power than competing systems. CAPS supports more than 40,000 global centrifugal installations through ten Australian branches, maintenance services and rental equipment.

> **SO WHAT:** Compressed air is invisible inside the finished product, which is precisely why management often underestimates it. When air touches ingredients, containers or contact surfaces, compressor design becomes a food-safety and energy decision, not a utility purchase. Oil-free systems reduce the downstream treatment required to manage contamination risk while improving the economics of a continuously consumed resource. The broader read-through is that manufacturers will increasingly classify utilities by product impact rather than plant department. Air, water and steam are ingredients whenever failure can compromise quality. Their control standards should reflect that reality.

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67. Trimatt Brings Edible Printing to Industrial Line Speeds

Food & Beverage Industry News **|** *Read Article*

Trimatt Systems launched the ColourStar AQE, an industrial direct-to-food printing system for biscuits, cookies, wafers and marshmallows. The single-pass machine prints full-colour images while products move continuously on a conveyor at 200 to 300 biscuits per minute. It uses certified edible CMYK inks suitable for halal and kosher markets. The turnkey system includes automated feeding, food-grade conveyors, stainless-steel construction and product collection, allowing each item to carry different artwork without stopping the line.

> **SO WHAT:** Edible printing moves personalization from a bakery-shop novelty into an industrial manufacturing option. At 200 to 300 units per minute, branding can change at product level without new molds, wrappers or lengthy line stops. That opens commercial space for events, licensing, regional campaigns and mass customisation while keeping the base recipe unchanged. The wider implication is that digital production is beginning to separate product identity from physical tooling. Manufacturers able to vary the surface cheaply can create more occasions from one operating platform. The risk is not technology; it is managing artwork, certification and brand control at industrial speed.

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68. RMIT Targets the Lab-to-Factory Translation Gap

Food & Beverage Industry News **|** *Read Article*

RMIT University launched a Food Innovation Hub at its Bundoora campus, combining food technology, nutrition, processing research and industry engagement. The hub will operate through RMIT’s Food Research and Innovation Centre, where companies, researchers and students can test concepts and evaluate processing and packaging technologies. Priority areas include converting commodities into higher-value functional ingredients and foods. RMIT cited recent work using ultrasound to recover protein from discarded cauliflower leaves as an example of research with potential manufacturing applications.

> **SO WHAT:** Australia does not lack food research; it lacks enough mechanisms that carry research through scale-up, customer validation and factory adoption. The hub targets that commercial gap by giving manufacturers access to facilities and talent without requiring every company to build its own development infrastructure. The second-order effect should be strongest for smaller processors that understand market needs but cannot finance pilot capability alone. Collaboration will only matter, however, if projects are designed around manufacturable economics rather than academic novelty. The value is not another study. It is a formulation or process that survives the operating line.

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69. CSIRO Connects 15 Agrifood Companies Across Two Markets

***Food & Beverage Industry News* |** *Read Article*

CSIRO launched a 12-week Thailand–Australia Venture Exchange with Thailand's Food Innopolis and Research University Network. Up to 15 startups and SMEs will receive coaching, funded travel during two market-immersion weeks and access to researchers, investors and customers. The programme covers food sustainability, aquaculture, future foods and alternative proteins and supports market-entry planning and technology commercialization. Applications for the first round close on 31 July 2026, with further rounds planned for 2027.

> **SO WHAT:** Most food technologies do not fail because the science is impossible; they fail because the developer cannot reach customers, regulatory systems or manufacturing partners in a second market. The exchange attacks that commercial bottleneck directly by connecting research capability with market access. For participating companies, the value is faster evidence on whether a technology travels across borders before large capital is committed. The broader implication is that innovation ecosystems are becoming regional rather than national. Countries that connect pilot facilities, investors and customers across markets will commercialize more science than those that simply fund more research at home.

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70. SEMMA Builds a Dedicated Network for Food Manufacturers

***Food & Beverage Industry News* |** *Read Article*

South East Melbourne Manufacturers Alliance launched a Food Manufacturers Group with Michaelona Flavours and Phase 9 NPD as founding partners. The network will provide professional development, industry updates and events for food manufacturers in a region containing 3,800 manufacturing businesses, employing 75,000 people and contributing A$89 billion to the economy. SEMMA said the initiative responded to demand for a dedicated forum through which local processors could share knowledge, build relationships and support business growth.

> **SO WHAT:** Factory capability is not built through equipment alone. Smaller manufacturers frequently solve the same labour, compliance, innovation and automation problems in isolation because they lack a neutral operating network. A focused industry group can reduce that

> duplication by circulating practical knowledge, connecting suppliers and creating a stronger regional voice for infrastructure and skills investment. The second-order effect depends on execution: another events calendar changes little, while structured collaboration around shared bottlenecks can raise the productivity of the cluster. Regional manufacturing strength becomes durable when companies compete commercially but cooperate on the capabilities none can build efficiently alone.

THEME 5:

Margin Pressure Is Forcing Portfolio Resets

71. General Mills Targets $3 Billion in Savings to Fund Growth

Just Food* | *Read Article

General Mills reported fiscal 2026 net sales of $18.42 billion, down 5%, while North America Retail sales fell 11% to $10.57 billion. The company launched a four-year programme targeting $3 billion in cumulative savings through fiscal 2030, including roughly $750 million in fiscal 2027. Management plans to redirect part of the savings into protein-rich products, bolder flavors, pet food and faster innovation, while recalibrating production and distribution for smaller packs and more flexible launches.

> **SO WHAT:** The non-obvious read is that General Mills is no longer treating productivity and innovation as separate agendas. The company needs the $3 billion reset to fund products consumers still consider worth paying for, while removing capacity and complexity built for stronger volumes. That raises the competitive floor across packaged food: cost savings that only protect earnings will not restore growth. The durable advantage will sit with manufacturers that convert supply-chain productivity into faster reformulation, sharper pack architecture and benefits such as protein that can defend price.

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72. Synlait Secures NZ$450 Million to Fund Its Turnaround

Just Food* | *Read Article

Synlait finalised a NZ$320 million bank refinancing alongside a NZ$130 million shareholder loan from Bright Dairy, creating a NZ$450 million funding package for its Stabilize, Simplify, Scale turnaround. The dairy processor also moved its financial year-end from 31 July to 31 December to align with Bright Dairy, using a five-month transitional period after July 2026. The refinancing addresses facilities maturing on 30 June and gives Synlait additional runway to simplify operations and rebuild performance.

> **SO WHAT:** Synlait has secured time, not a turnaround. The funding removes an immediate liquidity cliff and aligns reporting with its controlling shareholder, but the commercial burden now shifts to plant utilization, customer concentration and consistent cash generation. Dairy processors with specialized assets can survive weak cycles only when those assets carry dependable volume and disciplined contracts. The broader read-through is that lenders and strategic shareholders will support capacity with a credible route back to scale; they will not indefinitely finance operational complexity that fails to earn its cost of capital.

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73. ABF Sugar Faces Losses of Up to £60 Million

Just Food* | *Read Article

Associated British Foods warned that its sugar division could post a £25 million to £60 million operating loss in fiscal 2025/26, compared with a £2 million loss the previous year. Third-quarter sugar revenue fell 4% to £451 million as weak European sugar prices and higher gas costs, intensified by the Middle East conflict, squeezed refining economics. ABF expects further deterioration in 2026/27, while its planned separation of Primark from the food businesses remains targeted for completion by the end of 2027.

SO WHAT: The strategic problem is not one bad sugar quarter; it is a commodity business trapped between regulated crop economics, weak market prices and energy-intensive processing. ABF can absorb the losses today, but the planned Primark separation will expose the food portfolio's returns more clearly. The sector consequence is a tougher capital test for European sugar assets: scale alone will not protect plants whose energy curve sits above the market. Processors must secure cheaper energy, reduce fixed costs or rationalize capacity before transient support becomes a structural subsidy.

NOW WHAT → FutureBridge: If you run a food, beverage or bakery business, treat these losses as evidence that agricultural inputs now transmit climate, energy, policy and geopolitical shocks simultaneously. Replace annual commodity planning with an integrated sourcing, formulation, pricing and customer-management model, then quantify margin at risk before higher costs enter the next contract cycle. Use FutureBridge's intelligence agency-grade OSINT capability to track trade activity, permits, regulatory submissions, subsidiary moves, infrastructure changes and pre-announcement disruption signals, distinguish structural volatility from temporary price cycles, and produce an early-warning dashboard and sourcing, hedging, reformulation and price-realization playbook prioritized by category, customer and revenue exposure.

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74. Planethic Enters Self-Administration After Revenue Collapse

***Just Food* |** *Read Article*

Planethic Group, formerly Veganz, filed for German insolvency proceedings under self-administration to continue restructuring while existing management remains in control under court supervision. The filing applies to the holding company; operating subsidiaries and investments were expected to continue. Planethic cancelled a 21 July bondholder meeting concerning €10 million of 7.5% notes. The company had already reorganized around businesses including Mililk, Happy Cheeze and Peas on Earth after 2024 revenue fell 34% to €10.8 million.

SO WHAT: Planethic shows what happens when technology ambition outruns a financeable operating model. Self-administration may protect individual assets and intellectual property, but it cannot repair weak demand, repeated restructuring and a holding company that lacks dependable cash flow. The read-through for alternative-food ventures is blunt: patents, sustainability claims and international plans do not substitute for plant utilization and customer commitments. The likely winners will acquire viable technologies from distressed structures, while investors become less willing to fund broad platforms before each business proves its own route to margin.

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75. Kraft Heinz Reorganizes Around Three Global Regions

***FoodNavigator* |** *Read Article*

Kraft Heinz announced a global restructuring effective 1 July 2026, replacing its existing organization with three operating regions: North America, Emerging Markets, and Europe and Pacific Developed Markets. The company also combined procurement and supply chain under one global chief to strengthen end-to-end control and resilience. Several executives will leave during the transition. The overhaul comes while an earlier plan to separate Kraft Heinz into two businesses remains paused, with management prioritising faster decisions, volume growth and operational efficiency.

> **SO WHAT:** Kraft Heinz is pursuing many of the benefits of a corporate split without accepting the disruption of executing one. Regional accountability should speed commercial decisions, while combining procurement and supply chain creates one owner for cost, service and risk. The harder question is whether organizational simplicity can reverse years of volume pressure without another round of blunt cost cutting. Across large food companies, the model is shifting from global functional empires toward fewer decision points and clearer market ownership. Structure only matters, however, when it changes what reaches the shelf and how quickly.

> **NOW WHAT → FutureBridge:** Audit where commercial decisions are becoming misaligned with the new regional structure. This quarter, identify which brands and customer accounts still depend on global approval for pricing, promotion, assortment or renovation, and determine where those delays are costing shelf space or weakening retailer responsiveness. Use FutureBridge's intelligence agency-grade OSINT capability to track changes in regional leadership, category ownership, budget control and retailer-facing roles, and build a decision-migration map showing which teams now approve commercial actions, which SKUs are most exposed to regional delisting or repositioning, and where account relationships must shift before the next range-review cycle.

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76. Hormel Exits Brazil by Selling the Ceratti Business

Just Food **|** *Read Article*

Hormel Foods agreed to sell its Brazilian operations, run under the Ceratti brand, to local producer Zanchetta Alimentos. Hormel entered Brazil through the 2017 acquisition of Cidade do Sol, a branded value-added meats company. Financial terms were not disclosed, and Hormel expects the disposal to have only a minimal effect on adjusted fiscal 2026 results. Operations will continue during the approval process, with closing expected after customary regulatory and transaction conditions are satisfied.

> **SO WHAT:** Hormel is accepting that global presence has value only when the business can earn strategic attention and competitive returns. Selling Ceratti removes a geographically isolated operation and allows capital to move toward markets and categories where Hormel has greater scale. Zanchetta gains an established brand and manufacturing platform that fits its local system better. The broader implication is that food multinationals will keep pruning international assets that cannot share enough procurement, innovation or distribution with the core. Portfolio breadth is no longer automatically strength; disconnected complexity is increasingly treated as a cost.

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77. Libstar's Volumes Rise Just 0.3% as Costs Build

Just Food **|** *Read Article*

South African food manufacturer Libstar reported revenue growth of 0.9% for the 21 weeks to 31 May 2026, with volumes up 0.3% and price and mix contributing 0.6%. Excluding Dickon Hall Foods, revenue increased 3.5%. Perishable-products revenue rose 1.6%, despite a 0.8% volume decline, as price and mix added 2.4%. Libstar said trading was below its original expectations amid constrained consumer spending, inflation and higher petroleum-linked packaging and distribution costs.

> **SO WHAT:** Libstar's numbers show how quickly nominal growth can disguise an operating squeeze. Revenue is still moving, but almost none of the improvement comes from meaningful volume, while packaging, transport and manufacturing inflation continue to absorb the benefit. The company's stronger food service and selected private-label clusters provide some protection, yet the broader portfolio remains exposed to consumers trading down. The read-through for diversified manufacturers is that mix discipline now matters more than broad participation. Businesses must know which categories can carry inflation and which operating lines are merely converting cash into low-quality revenue.

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78. Fonterra Reorganizes Around Market-Level Value Capture

Food & Beverage Industry News **|** *Read Article*

Fonterra shifted from a channel-led to a market-led leadership structure following completion of the Mainland Group divestment. Each major market will now have one point of sales accountability across both Ingredients and Foodservice. Greater China will be led by Teh-han Chow, while Gaby Amade will oversee other global markets. A new growth and strategy function under Elisa Giusti will coordinate portfolio optimization, innovation and new business development, with the stated goal of directing farmer milk toward the highest-value demand.

> **SO WHAT:** Fonterra is reorganizing around where value is captured rather than how products were historically sold. A single market owner across ingredients and food service should expose trade-offs faster, reduce duplicated customer coverage and direct milk toward the best return. The challenge is preserving technical depth while increasing local accountability. The broader sector read-through is that commodity scale no longer guarantees value creation; dairy platforms need market-level decisions that connect milk allocation, product form and customer economics. The organization chart matters because it determines who can move volume before the market moves against it.

> **NOW WHAT → FutureBridge:** Recalculate where each unit of milk creates the highest return before the new market owners reset allocation priorities. This quarter compare margins, capacity requirements and customer commitments across commodity powders, specialized ingredients and foodservice formats, and identify which products could lose supply when local profitability takes precedence over global volume. Use FutureBridge's intelligence agency-grade OSINT capability to track export flows, plant utilization, pricing spreads, application investment and customer demand, and build a milk-allocation model showing which product forms should receive capacity, which contracts require protection and where supply exposure must be reduced.

79. Bimbo Sets a 2028 Deadline for Cleaner US Recipes

Just Food **|** *Read Article*

Bimbo Bakeries USA set out a multi-year programme to remove artificial colors, flavors, preservatives and emulsifiers across major US bakery brands by the end of 2028. Everyday breads, buns and rolls are already free from artificial colors and flavors, and Red No. 3 has been removed from the US portfolio. Artificial colors are due to leave sweet baked goods and snacks by the end of 2026, followed by staged preservative and emulsifier changes across brands including Artesano, Oroweat, Sara Lee, Little Bites and Thomas.

> **SO WHAT:** Bimbo is attempting clean-label reformulation at a scale where every ingredient change touches shelf life, line performance and affordability. Bread is not a premium niche that can absorb unlimited cost; it is a high-volume staple with unforgiving waste economics. The programme therefore becomes an industrial test of whether simpler labels can coexist with national distribution and retailer service requirements. The second-order effect will reach ingredient suppliers, co-manufacturers and smaller bakers that lack Bimbo's R&D runway. Once the category leader resets expectations, artificial additives become commercially harder to defend even when they remain legal.

80. Nestlé Commits to Remove Artificial Colors Globally

FoodNavigator **|** *Read Article*

Nestlé committed to remove artificial food colors from its entire global portfolio by the end of 2026, extending work already completed in the US. Technology chief Stefan Palzer said the transition required years of screening natural alternatives, production trials and shelf-life testing. The programme spans a portfolio covering confectionery, beverages, bakery and other categories, making it one of the broadest colour-reformulation commitments by a global food company. Nestlé linked the move to consumer demand for simpler recipes and more recognizable ingredients.

> **SO WHAT:** Nestlé has turned artificial-colour removal from a regional compliance response into a global operating standard. That simplifies the long-term portfolio, but the transition is technically expensive because natural colors behave differently under heat, light, acidity and time. The broader consequence is a faster shift in what customers and regulators consider normal. Rivals may retain synthetic colors legally, yet they will increasingly need to explain why. For colour suppliers, the decision expands demand but also raises the performance bar: natural systems must survive factory conditions and shelf life, not merely look convincing in a laboratory sample.

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81. Mars Launches Dye-Free Options Without Blue or Brown M&M's

Just Food **|** *Read Article*

Mars announced four US confectionery and gum offerings made without certified FD&C colors across brands including M&M's, Skittles, Starburst and Extra. A naturally colored M&M's version is scheduled to launch through Amazon in August 2026, initially without blue and brown pieces because scalable natural replacements remain technically difficult. Mars has assigned nearly 100 employees to the transition and is using ingredients including beet and turmeric for several colors. The existing conventionally colored products will remain available while reformulation work continues.

> **SO WHAT:** Mars is showing why colour reformulation is an operating problem, not a label edit. Blue shades can clog equipment, leave residue and create food-safety or cleaning complications, while removing two iconic colors alters the product consumers recognize. Offering parallel versions protects choice but doubles complexity across sourcing, scheduling and inventory. The broader read-through is that natural-colour commitments will expose which manufacturers possess deep process science and flexible lines. Political pressure may trigger the decision, but only engineering can make it durable. The cost of simpler labels will be paid inside the factory.

82. Ehrmann Puts 15 Grams of Collagen Into RTD Coffee

***Just Food* | Read Article**

Ehrmann and collagen brand Glow25 agreed a multi-year partnership to launch Glow To Go Coffee in Germany on 3 August 2026. The Caramel and Caffè Latte drinks contain 15 grams of bovine collagen hydrolysate in each 250-millilitre glass bottle, plus biotin, niacin, selenium and 25 milligrams of caffeine per 100 milliliters. The products will sell for about €2.99 through retailers including REWE, Edeka and Kaufland, selected drugstores, Amazon and Glow25's direct channel.

> **SO WHAT:** The partnership converts collagen from a supplement ritual into a familiar refrigerated-coffee occasion. Glow25 contributes a ready-made consumer community, while Ehrmann supplies formulation, thermal-processing and retail-distribution capability that the beauty brand could not build quickly. The commercial opportunity is larger than one launch: meaningful collagen dosage inside an everyday beverage creates a repeatable platform for beauty, energy and protein benefits. The second-order effect is a new competitive boundary between dairy, functional drinks and supplements. Brands that own trust but not manufacturing will increasingly need processors capable of stabilizing difficult actives at scale.

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83. Hershey Moves Reese's Deeper Into Protein Snacking

***Just Food* | Read Article**

Hershey expanded its protein-snacking portfolio with the One x Reese's Peanut Butter Chocolate Flavored Layered Protein Bar. The Amazon launch delivers 18 grams of protein, nine grams of fiber and two grams of sugar per bar, combining Reese's peanut butter, Hershey's chocolate and crisped rice. It follows earlier Reese's and Hershey's protein-bar collaborations under the One brand, which Hershey acquired in 2019. The product is expected to expand from online multipacks into conventional retail and single-bar formats.

> **SO WHAT:** Hershey is using brand equity to reduce the taste penalty that has historically limited protein bars. The product does not ask consumers to choose between function and familiarity; it imports a trusted confectionery flavour into a nutritionally coded format. That allows Hershey to compete for occasions and margins beyond traditional candy without abandoning indulgence. The broader implication is that functional nutrition will increasingly be colonized by mainstream brands

with stronger sensory assets and distribution. Specialist protein companies can no longer rely on macros alone when global snack platforms can match the benefit and outspend them on taste.

84. Forager Uses Global Flavours to Defend Plant-Based Premiums

Dairy Foods* | *Read Article

Forager Project added three dairy-free creamers: Golden Salted Caramel, Banana Bread and Mexican Chocolate. The 20-ounce products use organic cashews, coconut cream and gluten-free oat extract and carry a suggested price of $6.99. The flavors join Plain Unsweetened, Cinnamon Vanilla and Sweet & Creamy Brown Sugar. Forager positioned the range around globally inspired flavour, nostalgia and clean organic ingredients rather than direct imitation of conventional dairy creamers, with the products designed for both hot and iced coffee.

> **SO WHAT:** Forager is shifting plant-based creamer competition away from dairy replication and toward flavour-led ritual. That matters because basic oat and almond alternatives have become crowded, leaving limited room to defend premium pricing through the base alone. Distinctive flavors can increase trial and frequency without requiring a new manufacturing platform for every launch. The second-order effect is a faster innovation cycle in creamers, where seasonal and culturally inspired profiles become the demand signal. Plant-based brands that remain anchored to substitution will lose ground to those that make the occasion more interesting than dairy.

THEME 6:

Trade Friction Is Redesigning Supply Chains

85. USMCA Non-Renewal Puts North American Investment on an Annual Clock

***Just Food* |** *Read Article*

The US declined to extend the US–Mexico–Canada Agreement for another 16 years during its 1 July joint review. US Trade Representative Jamieson Greer said Washington would continue negotiations over the agreement's shortcomings and trade deficits, with a third US–Mexico bilateral round scheduled for the week of 20 July. The pact has not expired: existing tariff preferences, rules of origin and dispute mechanisms remain effective, but annual reviews will continue and the agreement could terminate on 1 July 2036 without a later extension decision.

> **SO WHAT:** The immediate supply chain still functions, but the investment clock has changed. Food processors built around tariff-free North American flows now face a decade of recurring political review across dairy, meat, grains, produce and packaging inputs. That uncertainty will not stop today's shipments; it will weaken confidence in tomorrow's plant, sourcing and capacity decisions. The second-order effect is a premium on manufacturing flexibility and dual-country supply options. Integrated trade remains economically rational, but companies can no longer assume the rules supporting it will remain commercially neutral.

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86. A$12 Million Grain Programme Targets Post-Harvest Export Risk

***Food & Beverage Industry News* |** *Read Article*

The Queensland government and the Grains Research and Development Corporation committed A$12 million to post-harvest grain research. Work at state laboratories will cover insect detection, pest monitoring, fumigation, storage safety and resistance in five common stored-grain pests. Researchers will also develop methods to remove harmful gases from storage facilities ahead of updated Safe Work Australia rules expected before 2027. The programme aims to reduce post-harvest losses and chemical residues while preserving the use of phosphine and protecting export-market access.

> **SO WHAT:** This investment protects the part of the grain chain that determines whether a harvested crop becomes a saleable export. Insect resistance, unsafe fumigation and residue failures can destroy value after every farming cost has already been incurred. Better detection and storage control therefore defend both processor supply and national market access. The second-order effect is a higher technical floor for grain handlers and storage operators, which will need stronger monitoring and ventilation practices to remain compliant. In grains, food security is not just production volume; it is the ability to preserve specification safely between harvest and processing.

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87. Australian Wine Rebuilds Demand Across Asia-Pacific

Food & Beverage Industry News | *Read Article*

Wine Australia expanded trade and education programmes across Japan, China and Southeast Asia to rebuild exporter momentum. Its pavilion at Vinexpo Asia featured 60 exhibitors and about 600 wines before more than 14,000 trade professionals from 76 markets. A separate China roadshow in Beijing, Nanjing and Changsha attracted over 1,200 trade and media attendees and showcased more than 500 wines from 80 brands and over 40 regions. Government-backed visits also brought Asian buyers and educators to Australian wine regions.

> **SO WHAT:** Australian wine is not suffering from a lack of production; it is suffering from the need to rebuild demand across more markets after years of concentration. Education and trade activation can convert regional diversity into a commercial advantage, but only when exporters align styles, pricing and distribution with local consumption occasions. The second-order effect is a shift from relying on one large market toward maintaining many smaller demand engines. That model is more resilient, but it is also operationally harder. Wineries will need flexible portfolios and disciplined market support rather than assuming national origin alone will move inventory.

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88. FAIRR Finds Regenerative Targets Retreating Across Big Food

Just Food | *Read Article*

FAIRR assessed 78 listed agrifood companies with combined revenue of US$3.3 trillion and found a widening credibility gap in regenerative agriculture. The share setting quantified targets fell from 35% in 2023 to 28% in 2026. Although 54% said they measure outcomes or have verification systems, only 4% had outcome-based targets and 24% reported progress even on greenhouse-gas emissions. Several companies had removed, weakened or stopped disclosing earlier commitments, while animal-protein supply chains remained significantly underrepresented.

> **SO WHAT:** The sector has confused programme activity with supply-chain resilience. Paying for pilots or counting acres says little about whether soil, yield, water and input exposure are improving at the scale required to protect sourcing. Investors are now asking for outcomes because vague commitments do not support capital allocation or procurement decisions. The second-order effect will be tighter scrutiny of claims and a sharper divide between suppliers that can prove agronomic performance and those selling sustainability language. Regenerative agriculture remains commercially relevant, but credibility will move to contracts, measurement and verified risk reduction—not corporate ambition statements.

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89. Canada's C$3 Billion Food Plan Still Needs Private Capital

Just Food | *Read Article*

Canada launched a National Food Security Strategy backed by more than C$3 billion over ten years. Measures include a C$1 billion Agri-food Project Finance Fund through Farm Credit Canada, a C$150 million Food Security Fund and major investment in food hubs and terminals intended to connect farmers, processors and independent grocers. The government wants more domestic processing and less reliance on foreign suppliers. Industry observers warned that public funding alone will not materially expand manufacturing without a much larger mobilization of private capital.

> **SO WHAT:** Canada has correctly identified processing capacity as a sovereignty issue, but announcing funds is easier than financing plants that can stay full. Public capital can reduce early project risk; it cannot manufacture customer demand, skilled labour or operating productivity. The second-order effect is a race to convert policy support into bankable regional platforms before construction costs absorb the subsidy advantage. If private investors remain unconvinced, Canada will continue exporting commodities and importing the value-added products made from them. Food security becomes durable only when domestic conversion assets earn competitive returns without permanent public support.

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90. Los Angeles Fire Traps 85 Million Pounds of Frozen Food

Food Manufacturing* | *Read Article

Los Angeles declared an emergency after a fire at a privately owned cold-storage warehouse in Boyle Heights created hazardous-air and biohazard risks. Authorities said the building contained 85 million pounds of frozen food, while zero visibility and the warehouse layout prevented firefighters from moving pallets or reaching the interior safely. Nearby residents received shelter-in-place instructions, and the city sought state recovery assistance for toxic-material removal and disposal. The fire began several days before the 22 June report and remained active.

> **SO WHAT:** The incident exposes concentration risk that rarely appears on a food company's factory map. Eighty-five million pounds of inventory in one cold store represents working capital, customer service and disposal exposure tied to a single building. Insurance may cover part of the product loss, but it cannot immediately replace regional freezer capacity or missed deliveries. The broader read-through is that warehouse resilience requires the same network discipline as manufacturing: fire compartmentation, inventory visibility, alternate sites and tested diversion plans. Finished goods are not secure simply because production has ended.

THEME 7:

Packaging Is Becoming a Performance Lever

91. Kepak Uses Shelf Life to Cut Sandwich Waste by Up to 50%

Packaging News **|** *Read Article*

Kepak launched its East St Deli sandwich and wrap range using modified-atmosphere packaging to extend freshness beyond the one-to-two-day shelf life common in pre-packed sandwiches. Internal modelling indicates the added life could reduce retailer sandwich waste by up to 50%; UK retailers discard an estimated 10.7 million to 17.8 million sandwiches annually. The range uses recyclable aPET, paper and card materials and is produced in BRCGS gold-standard facilities. It includes five sandwiches and two wrap varieties.

> **SO WHAT:** The non-obvious read is that packaging has become a margin instrument in chilled food-to-go. Extra selling time reduces write-offs, improves order flexibility and makes premium sandwiches economically viable in stores with uneven daily demand. Retailers gain more than a sustainability claim; they gain a stronger gross-margin equation without adding preservatives. The second-order effect is pressure on chilled suppliers, still competing mainly through recipes and price. When waste determines category profitability, the pack that protects the sale becomes as commercially important as the food inside it.

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92. Tetra Pak Challenges the Tuna Can With an Ambient Carton

Packaging Insights **|** *Read Article*

Tetra Pak equipped Spanish seafood producer Jealsa with what it describes as the first carton format for shelf-stable tuna. The 200-millilitre Tetra Recart launched through Swedish retailer Axfood and is expected to become available globally. Tetra Pak says the rectangular pack improves shelf branding, stacking and storage and uses up to 71% FSC-certified paper. Its comparative life-cycle assessment estimates an 85% lower carbon footprint than steel cans and 83% lower than glass jars. The shelf-stable tuna market is projected to reach 12.4 billion units by 2030.

> **SO WHAT:** Tetra Pak is challenging a package format that has remained commercially protected by habit. The carton gives tuna producers more branding space, denser logistics and a lower-carbon proposition while retaining ambient shelf life. That combination can change both the cost-to-serve and the way a commodity-like category competes on shelf. The broader implication is that legacy packaging formats are vulnerable once an alternative matches processing performance and improves distribution economics. Can makers will not lose the category overnight, but they now face a credible system rather than another sustainability concept.

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93. CJ and Lotte Design Packaging From Freezer to Microwave

Packaging Gateway **|** *Read Article*

CJ CheilJedang and Lotte Chemical signed an agreement to develop packaging that can withstand cryogenic frozen logistics and high-temperature microwave cooking. The companies will work jointly from the raw-material design stage, combining CJ CheilJedang's food-packaging R&D with Lotte Chemical's materials expertise. The programme aims to improve cold resistance, heat resistance, physical durability and content protection while reducing damage during frozen storage and distribution. CJ CheilJedang is also developing recyclable and lower-plastic packaging and commercializing PHA, a biodegradable biomaterial.

> **SO WHAT:** The strategic shift is that the food manufacturer is helping design the resin rather than adapting products to whatever packaging suppliers already sell. That brings real operating conditions – freezing, transport, microwaving and consumer handling – into material development from the start. The result should be fewer failures and faster commercialization of convenience formats that cross extreme temperature ranges. The second-order effect is a higher bar for packaging partnerships. Suppliers that cannot co-develop against the customer's processing and distribution system will be displaced by those willing to own performance from polymer design through final use.

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94. Mono-Material Frozen Packs Survive a Three-Meter Drop

Packaging Strategies* | *Read Article

ExxonMobil Signature Polymers and LD PACK developed a recyclable mono-material frozen-food structure using MDO PE//PE as an alternative to conventional BOPET//PE laminates. The pack combines Exceed Stiff+, Exxtra Seal and Exceed HD polymers with LD PACK's converting technology. In testing, it achieved 100% bag-drop survival after conditioning at minus 30°C and being dropped three meters. It also delivered improved needle-puncture resistance, low-temperature tensile strength, shelf stiffness and package integrity during frozen storage and transport.

> **SO WHAT:** Frozen packaging has resisted mono-material conversion because recyclability means little if bags crack, puncture or lose seal integrity below zero. This development attacks that performance gap directly rather than asking manufacturers to accept weaker packs for a better environmental claim. If commercial trials confirm the laboratory results, processors can simplify material structures without increasing product loss or line disruption. The broader read-through is that sustainable packaging adoption will accelerate only when technical performance reaches parity. The winning material will not be the greenest on paper; it will be the one that survives the freezer and the distribution network.

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95. Mondelēz Puts 75% Recycled Content Into Marabou Packs

Packaging Strategies* | *Read Article

LyondellBasell, Mondelēz, Amcor, Taghleef Industries and other partners developed flexible packaging for Marabou chocolate bars using LYB Circulen Revive polymers. The structure contains 75% recycled content, supported by polymers with 100% attributed recycled feedstock through an ISCC PLUS-certified mass-balance approach. LYB plans to supply future material through MoReTec-1, its commercial-scale catalytic chemical-recycling plant under construction in Wesseling, Germany. The project converts hard-to-recycle mixed plastic waste into food-grade polymer feedstock while maintaining demanding confectionery-packaging specifications.

> **SO WHAT:** The commercial breakthrough is not the recycled-content claim; it is putting chemically recycled material back into food-contact packaging without surrendering performance. That requires coordination across waste sorting, chemical recycling, resin production, film conversion

and brand qualification – capabilities no single company controls alone. The second-order effect is a new scale advantage for companies able to organize that chain and document mass balance credibly. Smaller brands may support circularity in principle but struggle to secure qualified feedstock. Recycled content is becoming a supply-system capability, not a packaging-team procurement choice.

96. Amcor Tests Seaweed Barriers for Recyclable Fiber Packs

Packaging Insights **|** *Read Article*

Amcor partnered with UK start-up Kelpi to test a seaweed-based barrier coating for its AmFiber fiber-packaging portfolio. The companies will evaluate commercial viability, scalability, gas and moisture protection, high-speed processability and compatibility with paper-recycling streams. Amcor said the coating could reduce dependence on fossil-derived polymers while maintaining the performance needed for food protection. The collaboration forms part of Amcor's open-innovation approach to bringing new materials into its global packaging platform.

> **SO WHAT:** The market has no shortage of bio-based coatings; it has a shortage of coatings that can run fast, protect food and pass through existing recycling systems. Amcor's involvement gives Kelpi access to the converting knowledge and customer qualification required to move beyond pilots. For Amcor, the partnership creates an option on a renewable barrier technology without betting the portfolio before scale is proven. The wider implication is that packaging majors will increasingly act as commercial filters for material start-ups. Promising chemistry becomes valuable only when an industrial partner can make it manufacturable.

97. Elopak Cuts Carton Emissions Without Weakening the Barrier

Packaging Insights **|** *Read Article*

Elopak began using reduced-carbon Aluminium produced with renewable electricity for cartons made at plants in the Netherlands, Denmark and Ukraine. The change reduces the cradle-to-gate footprint of a standard aseptic Pure-Pak carton from 53 to 49 grams of CO_2, an improvement of nearly 8%, while retaining the Aluminium barrier needed against light and oxygen. Elopak sources Aluminium from Aluminium Stewardship Initiative members and also offers its Aluminium-free Pure-Pak eSense carton for ambient distribution.

> **SO WHAT:** Elopak is improving the carbon profile of an essential barrier rather than removing it before an alternative can protect shelf life. That is the commercially disciplined route: decarbonize the component while preserving aseptic performance and keeping an Aluminium-free option for applications that can support it. The second-order effect is growing demand for component-level carbon data across the packaging bill of materials. Food companies will increasingly compare packs on verified footprint and product protection together. A lower-carbon carton that increases spoilage is not progress; the winning design reduces emissions without transferring cost into food waste.

98. Twinings Turns Tea Packs Into Accessible Information Platforms

***Packaging Insights* | Read Article**

Twinings introduced accessible QR and GS1 Digital Link codes across its UK tea packaging, beginning with the Black Tea range. Developed with the Royal National Institute of Blind People, Zappar and io.tt, the system helps blind and partially sighted consumers locate products and access ingredients, brewing instructions and other information through smartphone accessibility tools. Twinings described itself as the first UK tea brand to deploy the technology at scale. The rollout turns the pack into a connected information channel rather than relying only on printed text.

> **SO WHAT:** Twinings is showing that connected packaging can solve a real consumer barrier rather than merely add marketing content. One code can deliver accessible instructions, ingredients and future updates without forcing every piece of information onto limited pack space. That creates a platform for inclusion today and traceability, recycling guidance or regulatory updates later. The broader implication is that digital links will become part of packaging architecture, not an optional campaign feature. Brands that establish the data system early will adapt faster as information requirements expand; those treating QR codes as decoration will gain little.

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99. Hotpack and HZ Link Paper Capacity With Global Distribution

***Packaging Insights* | Read Article**

Hotpack and Malaysia's HZ Corporation formed a joint venture to expand paper-based foodservice packaging. The partnership combines Hotpack's distribution network across the Middle East and other global markets with HZ's Southeast Asian manufacturing footprint and expertise in paper packaging and dry-molded fiber. Initial products will include paper cups, folding cartons, paper bags and related formats for quick-service restaurants, coffee chains, airlines, caterers and delivery platforms. The venture aims to increase manufacturing scale and meet growing demand for certified alternatives to plastic.

> **SO WHAT:** The partnership addresses the central weakness in sustainable foodservice packaging: technology and demand often sit in different geographies. HZ contributes manufacturing capability, while Hotpack brings multinational customers and route-to-market reach. Together, they can move paper formats from fragmented local supply into dependable regional programmes. The second order effect is pressure on converters that remain confined to one market or one product family. Regulation may create the demand signal, but large buyers will award contracts to suppliers that can manufacture consistently across regions. Sustainability only becomes structural when capacity and distribution arrive together.

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100. Mars Moves 67.6% of Packaging Toward Circular Formats

***Packaging Strategies* | Read Article**

Mars reported that 67.6% of its consumer-facing packaging was designed to be reusable, recyclable or compostable in 2025. The company incorporated 18,721 tonnes of recycled content, equal to

9.2% of its global plastic portfolio, and expanded 100% recycled-PET formats across selected M&M’s, Skittles, Starburst and MasterFoods packs. Mars also replaced multi-material and polystyrene formats, tested paper flow wraps for KIND products and developed recyclable Whiskas wet-pet-food pouches for the UK and Germany.

> **SO WHAT:** The non-obvious read is that Mars is turning packaging circularity into a portfolio-management and regulatory-readiness programme, not a collection of pilots. Moving more formats onto recyclable structures and securing recycled feedstock reduces exposure to future producer fees, material restrictions and retailer requirements. The second-order effect is a higher capability floor for smaller manufacturers, which must fund redesign, supplier qualification and packaging data without Mars’ purchasing scale. Circularity will increasingly favor companies able to standardize materials across brands while protecting shelf life and line performance.

Thought Leadership Pieces, July 2026 Edition:

CLUSTER I

Manufacturing strategy, investment and operating models

TL-1. Food Digital Twins Remain Trapped in Fragmented Pilots

Taylor & Francis* | *Read Article

Researchers reviewed 148 Scopus-indexed studies published between 2019 and September 2025 on digital twins in food and agricultural supply chains. Research accelerated after 2021 and clustered around enabling technologies, supply-chain decisions, cold-chain management and human-centered applications. The review found that studies are shifting from descriptive monitoring towards predictive and prescriptive systems. However, interoperability, data ownership, governance, standardized performance measures and long-term industrial validation remain underdeveloped.

> **SO WHAT:** The research base is growing faster than industrial proof. Too many food digital twins monitor conditions without gaining authority over production decisions. That creates visibility, not transformation. Manufacturers should stop pursuing enterprise-wide twins before proving one closed loop where sensing, prediction, intervention and financial value connect. The next maturity threshold is not another dashboard; it is validated recommendations that operators trust and repeat. Standardization also matters. Without common data models, every plant becomes a custom integration project. That destroys the network economics digital twins are supposed to create.

TL-2. Regulatory Volatility Threatens US Investment in UK Food

Food Manufacture* | *Read Article

BritishAmerican Business warned that overlapping UK rules on HFSS products, nutrient profiling, packaging, labelling and sustainability could weaken future US investment in food manufacturing. The sector contributes £42 billion to the UK economy and supports nearly 500,000 jobs. PepsiCo invested £35 million between 2022 and 2025 to support healthier snacks, while Mondelēz said roughly £40 million spent on HFSS reformulation could be undermined by further changes to the Nutrient Profiling Model. The group called for more coordinated, evidence-based policy.

> **SO WHAT:** The issue is not regulation itself; it is regulatory sequencing that repeatedly changes the commercial return on completed investment. When a reformulation programme becomes obsolete before the equipment and recipes have paid back, global manufacturers move the next project elsewhere. That creates a structural competitiveness problem for the UK because lost capital also means fewer trials, slower factory upgrades and weaker supplier demand. Policymakers can pursue health and environmental goals, but they must provide a stable reformulation runway. Moving the goalposts after capital is committed taxes credibility more heavily than any individual rule.

> **NOW WHAT → FutureBridge:** If you are a food manufacturer or ingredient business with UK exposure, treat this warning as evidence that regulatory volatility destroys investment returns even when end-market demand remains attractive. Stress-test reformulation, packaging, labelling and sustainability investments against defined policy scenarios, then set clear hurdle rates and stop-loss triggers for capital deployment. Use FutureBridge's intelligence agency-grade OSINT capability to track regulatory submissions, ministry consultations, corporate investment pauses and pre-announcement policy signals, identify where cumulative compliance costs are already undermining project economics, and produce a market-attractiveness and capital-allocation

roadmap showing where to invest, delay, redesign or redirect growth spending before uncertainty erodes returns.

TL-3. CPG's Innovation Model Has Stalled

Boston Consulting Group* | *Read Article

BCG argues that large food and beverage companies have lost innovation leadership after years of underinvesting in R&D related to advertising and promotion. Many category breakthroughs now come from smaller challengers, while established companies remain reliant on incremental product extensions.

SO WHAT: Innovation advantage increasingly depends on owning differentiated recipe, ingredient, processing and equipment capabilities, not simply strong brands. Large manufacturers need fewer but larger technical platforms that can generate multiple products, while ingredient and equipment suppliers have an opportunity to become embedded co-development partners.

TL-4. Shared Capacity Could Replace Plant Ownership

RaboResearch* | *Read Article

RaboResearch examines whether food manufacturers could improve asset utilization by sharing production facilities, infrastructure or specialist capacity instead of each company building and operating a fully independent network.

SO WHAT: Plant ownership is becoming a weaker proxy for manufacturing strength. Shared plants, co-manufacturing networks and modular capacity reduce capital intensity while giving manufacturers greater flexibility to absorb volatile volumes and rising SKU complexity. The advantage, however, accrues only to companies that can tightly control food safety, intellectual property, scheduling, customer segregation and service levels. Those without that governance will lose more through operational leakage and disruption than they save in capital.

TL-5. Europe's Food Innovation Gap Is Scale-Up

FoodDrinkEurope* | *Read Article

FoodDrinkEurope called for food manufacturing to receive greater recognition within the EU's next research programme. Its proposals include support for pilot plants, demonstration facilities, automation, traceability, reformulation, packaging innovation and factory modernization.

SO WHAT: Europe's competitiveness problem is increasingly located between laboratory success and commercial production. Without stronger pilot and demonstration infrastructure, scientific leadership will continue to migrate toward markets that can scale technologies faster. The ability to industrialize innovation – not simply invent it – is becoming the decisive capability.

Thought Leadership Pieces, July 2026 Edition:

CLUSTER 2

Food safety, traceability and regulatory control

TL-6. FSA Finds 36% Non-Compliance at Smaller Food Retailers

Food Manufacture* | *Read Article

The UK Food Standards Agency's sixth Retail Surveillance Survey examined 845 products across 20 categories, with 800 samples fully assessed. Among products sourced from smaller and specialist retailers, 36% failed at least one regulatory requirement. Imported and trend-led products carried the greatest risk: only one of 45 Dubai-style chocolate samples was fully compliant. The failures covered authenticity, allergen declarations, composition and labelling, with additional problems identified in goat meat, South Asian bakery products, snacks and supplements.

> **SO WHAT:** The real warning is not that small retailers have weaker paperwork; it is that fragmented sourcing is creating blind spots that manufacturers and importers can no longer treat as someone else's problem. Viral products now move across borders faster than specifications, allergen controls and verification systems can catch up. The second-order effect will be tighter retailer onboarding, more laboratory testing and fewer opportunities for suppliers unable to prove authenticity at SKU level. Compliance capability is becoming a route-to-market requirement, and the suppliers carrying incomplete data will increasingly be removed before their products reach the shelf.

> **NOW WHAT → FutureBridge:** If you sell through independent retailers, online sellers or fragmented distribution, treat the 36% non-compliance rate as evidence that channel expansion creates hidden food-safety and brand-equity risk. Identify which customers require tighter onboarding, testing and product-authenticity controls, then quantify the revenue exposed through delisting, recall and reputational failure. Use FutureBridge's intelligence agency-grade OSINT capability to track enforcement activity, local-authority actions, retailer failures and emerging high-risk product trends, identify where compliance capability is weakest, and produce a channel-risk heatmap, customer-tiering model and assurance program showing where to strengthen controls, restrict distribution or price compliance support into commercial agreements by customer segment.

TL-7. China Makes Brand Owners Accountable for Contract Manufacturing

China Briefing* | *Read Report

China introduced its first dedicated regulations for contract food manufacturing, effective 1 December 2026. Brand owners will share legal responsibility for food safety with manufacturers and must verify their partners' licenses and production capabilities, formalize supervision and testing requirements in written contracts, report manufacturing arrangements to local regulators, retain inspection records and identify both parties on product labels. The measures cover OEM and ODM production commissioned by China-based companies for sale in the domestic market.

> **SO WHAT:** The rules fundamentally change contract manufacturing from an arm's-length sourcing arrangement into an extension of the brand owner's regulated operating system. Outsourcing production will no longer transfer regulatory accountability, increasing the value of manufacturers with transparent quality systems, auditable operations and strong documentation. This could accelerate consolidation toward larger and more compliant partners while raising the cost and governance burden of fragmented co-manufacturing networks.

NOW WHAT → FutureBridge: If you use contract manufacturing in China, treat the new rules as confirmation that outsourcing production no longer outsources regulatory accountability. Audit every OEM, ODM, licensing and franchising relationship requiring direct oversight, then quantify the revenue exposed through weak supervision, incomplete records and misaligned licences. Use FutureBridge's intelligence agency-grade OSINT capability to track subsidiary filings, local regulator actions, manufacturing licences, contract disclosures and pre-announcement enforcement signals, identify counterparties and provinces carrying rising compliance exposure, and produce a manufacturer-risk map, audit protocol and contract-remediation roadmap showing where to retain, renegotiate, replace or internalize production before the December 1, 2026 deadline.

TL-8. Codex Advances Emergency and Allergen-Labelling Rules

FoodNavigator* | *Read Report

The Codex Alimentarius Commission introduced international guidance for precautionary allergen labels such as "may contain." Food companies should use these warnings only after implementing appropriate allergen-management controls and completing a scientific risk assessment that confirms a residual risk of unintended allergen presence cannot be adequately mitigated. The guidance seeks to replace inconsistent and overly cautious labelling with a more harmonized, evidence-based standard.

SO WHAT: Precautionary labelling is shifting from a broad legal safeguard to an evidence-based food-safety decision. Blanket "may contain" statements will become harder to justify, increasing pressure on manufacturers to demonstrate effective segregation, cleaning validation and quantitative risk assessment. This could raise the operating burden for complex shared-production facilities while strengthening the position of manufacturers with more controlled and auditable allergen-management systems**.**

TL-9. Europe Opens a Faster Route for Gene-Edited Crops

Just Food* | *Read Report

The European Parliament approved a new framework for plants developed through new genomic techniques. Category NGT-1 covers limited genetic changes that could occur through conventional breeding and would largely be treated as conventional crops after verification. Plants engineered for herbicide tolerance or insecticidal production cannot enter that category. More complex NGT-2 plants remain subject to existing GMO risk assessment and authorization requirements. The legislation was first proposed by the European Commission in 2023.

SO WHAT: Europe is not deregulating biotechnology wholesale; it is separating lower-complexity gene editing from traditional GMO controls. That distinction could shorten development timelines for crops designed around disease resistance, climate tolerance and processing performance. Food manufacturers may gain more resilient inputs, but they will also inherit new traceability, sourcing and consumer-communication questions. The second-order effect will be a widening gap between companies that engage early with breeders and those that wait for ingredients to become

> commodities. Regulatory access creates a development runway, but category acceptance will depend on proving commercial benefit without reopening yesterday's GMO trust battle**.**

TL-10. Denmark Retains Its Long-Standing Confectionery Tax

Just Food | ***Read Report***

Denmark's new four-party governing coalition retained the country's long-standing tax on chocolate, sugar confectionery and related products. The decision continued the levy despite repeated industry arguments that the system is administratively complex, distorts cross-border trade and raises domestic prices. The coalition is led by Prime Minister Mette Frederiksen in her third term. Confectionery manufacturers had sought reform or removal as part of wider discussions on business competitiveness and consumer costs.

> **SO WHAT:** The tax survives because governments increasingly view food categories as both revenue pools and behavior-management tools. Manufacturers cannot assume that inflation or competitiveness concerns will outweigh the political appeal of taxing indulgence. The commercial response will move beyond passing the cost through pack sizes, promotional calendars, product mix and border-channel leakage all become part of the operating model. The second-order effect is that countries with category-specific taxes create a different innovation economy from neighboring markets. Products optimized for one tax system may become uneconomic in another, making local portfolio architecture more important than regional standardization.

TL-11. Biofuel Rule Raises Competition for Regenerative Feedstocks

USDA | ***Read Report***

USDA highlighted support for its final Regenerative Feedstock Rule, issued alongside an executive order on regenerative agriculture. The rule links qualifying conservation practices to lower-carbon biofuel markets and the Section 45Z clean-fuel tax credit. Support came from the American Soybean Association, Clean Fuels Alliance America, Growth Energy, Iowa Corn Growers Association and renewable-fuels groups. USDA said the framework gives farmers a voluntary route to capture additional value from crops used as biofuel feedstocks.

> **SO WHAT:** Food processors should not dismiss this as farm policy. Biofuel incentives can redirect corn and soybean volumes towards energy markets, strengthen premiums for verified regenerative feedstocks and raise competition for oils, starches and protein co-products. The structural issue is allocation. When fuel economics reward attributes that food buyers also want, processors need tighter origin data, longer supplier agreements and clearer rules on who captures the premium. Sustainability claims without contracted feedstock access will become expensive theatre. The decision window sits upstream, but the margin impact lands on the processing line.

TL-12. Product of USA Label Turns Provenance Into Plant Data

USDA* | *Read Report

Ten additional meat and poultry companies adopted USDA's voluntary Product of USA label: Harris Ranch, One World Beef, Upper Iowa Beef, American Foods Group, Agri Beef, FPL Food, Hadrick Farms, Fort Worth Meats, Wholestone Farms and Harrison's Poultry. The claim applies to products from animals born, raised, harvested and processed in the United States. USDA also linked the initiative to its SPUR programme, which provides up to $500 million to preserve and expand small- and mid-sized beef-processing capacity.

> **SO WHAT:** Origin labelling is becoming an operating requirement, not a marketing flourish. Processors using the claim must prove domestic provenance across livestock sourcing, slaughter, fabrication and final packing. That raises the value of integrated traceability and penalizes plants built around opportunistic imported inputs. The label can support price premiums, but only where documentation survives audit and customer challenge. Expect large buyers to demand the same evidence even without using the seal. Provenance is moving from brand copy into plant data. Companies that cannot reconcile source records quickly will lose category access.

TL-13. Product Mix-Up Triggers Class I Pasta-Salad Recall

USDA* | *Read Report

Reser's Fine Foods recalled approximately 5,300 pounds of ready-to-eat Molly's Kitchen California Style Pasta Salad after discovering that some five-pound tubs contained chicken salad. The substituted product contained egg and milk, neither was declared on the pasta-salad label. The affected tubs carried a use-by date of July 16, 2026, and establishment number P-00874, and were distributed across seven states. FSIS classified the event as a Class I recall; no adverse reactions had been reported when announced.

> **SO WHAT:** This was not an ingredient mistake. It was a product-identity failure. When the wrong food enters the right tub, allergen checks, label verification and finished-goods reconciliation have all failed together. Prepared-food plants running multiple refrigerated salads are especially exposed because products look similar, changeovers are frequent and shelf lives are short. The operating imperative is positive product identification at filling, not reliance on employees recognizing appearance. Vision systems, barcode-controlled label release and inventory reconciliation are no longer optional productivity tools. They are the barrier between routine complexity and a Class I recall.

TL-14. Listeria Detection Exposes RTE Assembly-Line Risk

USDA* | *Read Report

FSIS issued a public-health alert for ready-to-eat chicken Caesar wraps produced by Taher on June 16, 2026, after testing detected Listeria monocytogenes. The wraps carried a June 24 sell-by date. A recall was not requested because the products were no longer available for purchase, although consumers might still have them. The incident involved a refrigerated, fully assembled product intended to be eaten without an additional kill step.

SO WHAT: Listeria in a ready-to-eat wrap is a plant-design warning, not a bad-luck event. Cooked chicken can leave lethality control and still be recontaminated through slicing, assembly, conveyors, drains or chilled-room traffic. Refrigeration slows growth; it does not eliminate the pathogen. Manufacturers need ruthless zoning, environmental sampling that hunts rather than confirms, and corrective actions that reach equipment design. A negative finished-product test is not a safety system. In high-care assembly, the pathogen lives in the operating environment. Plants unable to separate raw, cooked and exposed-RTE flows carry structural recall risk.

NOW WHAT → FutureBridge: If you run a ready-to-eat food business, treat this Listeria alert as evidence that finished-product testing does not protect revenue when contamination enters through ingredients, assembly environments or short-shelf-life distribution. Identify which products require supplier-level controls, expanded environmental monitoring and faster hold-and-release protocols, then quantify exposure after goods enter commerce. Use FutureBridge's intelligence agency-grade OSINT capability to track supplier alerts, inspection findings, recall linkages, distribution routes and repeated pathogen signals across facilities, identify where contamination risk is clustering, and produce a supplier-risk map, escalation triggers and preventive-control roadmap showing where to intensify verification, redesign sourcing or withdraw vulnerable formats before contamination reaches the market.

TL-15. Year-Long Label Error Expands Frozen-Meal Liability

USDA* | *Read Report

Power Plate Meals recalled approximately 5,795 pounds of frozen meatloaf with garlic mashed potatoes because the product contained undeclared soy. The affected 13.3-ounce vacuum-sealed trays were produced between June 25, 2025, and June 10, 2026, carried use-by dates through June 10, 2027 and were distributed in Minnesota, North Dakota and South Dakota. A state inspector identified the labelling omission. FSIS reported no confirmed adverse reactions when the recall was announced.

SO WHAT: A twelve-month production window turns a label error into a long-tail liability. Frozen meals stay in commerce and consumer freezers far longer than chilled foods, so one undeclared allergen can require retrieval across multiple lots, customers and seasons. That makes recipe governance and label version control fundamental inventory controls. Manufacturers need to block production when formulation, supplier or artwork records do not match-no manual override, no assumption. The cost is not only recalled pounds. It is months of effectiveness checks, customer disruption and trapped working capital. Long shelf life magnifies every weak control.

TL-16. Undeclared Wheat Exposes Jerky Label-Control Failure

USDA* | *Read Report

FSIS issued a public-health alert for 2.5-ounce bags of Street's Beef Jerky Teriyaki Flavor produced by GoodTimes Beef Jerky in Stratford, Oklahoma. The product contained wheat, a known allergen, that was not declared on the label. A recall was not requested because the affected jerky was no longer available for purchase, although consumers could still hold it. The identified lots were distributed to three Oklahoma retail locations.

> **SO WHAT:** This is a label-control failure disguised as a small incident. Jerky plants routinely manage marinades, seasoning blends and shared ingredients where wheat can enter through soy sauce or flavour systems. One missed specification or obsolete label turns a stable, shelf-ready product into a regulatory event. The fix is not another final-pack check. Manufacturers need formulation-to-label controls, supplier allergen verification and line-clearance discipline tied to every lot. Small processors face the highest exposure because one incident can overwhelm customer trust and cash flow. Allergen governance must operate at recipe level, not in the artwork department.

TL-17. Traceability Tests Expose Coordination as the Real Bottleneck

USDA* | *Read Report

FDA tested food companies' ability to respond to a simulated Food Traceability Rule records request using exercises conducted between 9 March and 1 April. Participants had to identify records for a specified product and period, then submit an electronic sortable spreadsheet within 24 hours. Most companies met the deadline. FDA found that proactive coordination between trading partners, not any single technology platform – produced the strongest results, although gaps remained in specific data elements.

> **SO WHAT:** The technology debate is a distraction. Traceability fails when suppliers, processors and distributors record the same shipment differently. Companies need aligned lot codes, event definitions and data ownership before buying another software platform. The 24-hour requirement turns fragmented records into operating risk: one missing field can delay containment, expand recall scope and immobilize saleable inventory. The decision window is open now. Traceability must be designed across trading partners, not delegated to the quality department after an incident.

TL-18. UK Inspection Reform Moves Compliance Toward Risk and Data

UK FSA* | *Read Report

FSA reported that 97% of local authorities were working under its new food-hygiene inspection model, although only 41% had fully upgraded supporting software. The plan also expands risk-based official controls, export-assurance activity and oversight of recycled-plastic food-contact facilities. Five recyclers were asked for additional information, one was considered ready for audit, and six inward international audits were planned or completed.

> **SO WHAT:** Risk-based regulation does not mean lighter regulation. It means compliant plants earn lower friction while weak plants attract concentrated scrutiny. Inspection history, digital records and corrective-action closure will increasingly determine regulatory attention. That creates a durable advantage for operators that can demonstrate control without assembling evidence from scratch. The lag in authority software also matters – inconsistent implementation will persist during transition. Manufacturers operating across multiple jurisdictions need one internal compliance floor, not local improvisation.

TL-19. UK Sandbox Targets Two Cultivated-Food Assessments by 2027

UK FSA* | *Read Report

FSA's regulatory sandbox aims to complete two cell-cultivated-product risk assessments by February 2027. Two applications passed validation in June 2025, while a routine non-complex novel-food assessment can take approximately two-and-a-half years. Workstreams cover production processes, hygiene, growth media, toxicology, allergenicity, nutritional composition, labelling and the legal status of cultivated products under existing meat rules. FSA has also launched a dedicated business-support service.

> **SO WHAT:** Cultivated food will not scale on bioreactor economics alone. Regulatory evidence is now part of the manufacturing platform. Developers must lock cell lines, media specifications, contamination controls and compositional consistency before commercial production—not after. The sandbox can shorten uncertainty, but it also establishes the data package future applicants will be expected to match. First movers gain more than approval. They help define the compliance architecture that later competitors must finance. Manufacturers operating across multiple jurisdictions need one internal compliance floor, not local improvisation.

TL-20. FDA Agenda Signals New Caffeine and Healthy-Claim Guidance

FDA* | *Read Report

FDA's updated 2026 Human Foods Program agenda identifies potential guidance on caffeine-content labelling, use of the "Healthy" claim and food-product categories used in facility registrations. The agency said these topics are priorities for completion during 2026, although guidance represents FDA's current thinking rather than legally enforceable requirements. Additional guidance may still be issued outside the published agenda.

> **SO WHAT:** Guidance is not law, but waiting for enforcement language is amateur hour. Caffeine-heavy beverages face immediate exposure across formulation records, serving-size calculations and label claims. Revised "Healthy" guidance can reopen product specifications and reformulation pipelines across cereals, snacks and prepared foods. Facility-category changes could also reshape registration and inspection data. Manufacturers should scenario-test portfolios now. Regulatory foresight is cheaper than artwork destruction, delayed launches and emergency reformulation.

> **NOW WHAT → FutureBridge:** If you run a U.S. food or beverage portfolio, treat FDA's guidance agenda as an early indicator of where commercial friction is forming before enforceable rules arrive. Identify which caffeine labels, "healthy" claims and facility registrations require pre-emptive redesign, then quantify the revenue exposed as guidance resets retailer standards and consumer expectations. Use FutureBridge's intelligence agency-grade OSINT capability to track draft guidance, public comments, agency speeches, regulatory submissions and competitor label changes, identify which topics are advancing fastest toward commercial impact, and produce a regulatory-horizon map, claims-priority matrix and portfolio-readiness plan showing where to reformulate, relabel, engage regulators or accelerate compliant innovation.

TL-21. FSANZ Clears Five HMOs and Adjusts Oyster Cadmium Limits

Food Standards Australia New Zealand* | *Read Report

FSANZ approved voluntary use of five human-milk oligosaccharides – 2′-FL, 3-FL, LNT, 3′-SL and 6′-SL – produced using genetically modified E. coli BL21 in infant formula products. It also approved a new production source for 2′-FL. Separately, the board accepted a maximum cadmium level of 3 milligrams per kilogram for Northern Territory blacklip rock oysters, subject to specific transitional arrangements.

> **SO WHAT:** Novel-ingredient approval is shifting from molecule-level science to manufacturing-platform scrutiny. Fermentation strain, purification consistency and residual-control data now determine market access. Approval of multiple HMOs opens formulation runway, but it also raises the quality floor for suppliers competing in infant nutrition. The oyster decision carries the same lesson from another direction: natural variability still needs defensible specifications. Whether the input comes from a fermenter or the ocean, compositional control wins.
>
> **NOW WHAT → FutureBridge:** If you run an infant-nutrition or specialty-ingredients business in Australia or New Zealand, treat FSANZ’s approvals as evidence that regulatory clearance is now the decisive gateway for nutrition platforms. Determine which human-milk oligosaccharide technologies warrant investment, partnership or licensing, then quantify the revenue pool available before approved formulations become category standards. Use FutureBridge’s Company Genomics, a real-time patent-profiling tool for competitive intelligence, to compare patented HiMO production technologies across companies, adjacent industries and U.S. patent portfolios, identify defensible strains, processes and freedom-to-operate gaps, and produce a partner shortlist, technology-access strategy and commercialization roadmap tied to the regulatory pathway, manufacturing economics and market-entry timing.

TL-22. UK Nutrition Rules Could Cost £2,812 Per SKU

Food and Drink Federation and Oxford Economics* | *Read Report

Oxford Economics assessed proposed changes to the UK Nutrient Profiling Model across manufacturers representing approximately 15,000 products. It estimated implementation costs of £2,812 per product – up to 50 times the government’s £53 estimate. Surveyed manufacturers expected average sunk-investment losses of £10 million, a 40% increase in products restricted from advertising or promotion and withdrawal of around 12% of affected products.

> **SO WHAT:** Regulation is now rewriting portfolio economics SKU by SKU. The real cost is not reading the rule; it is reformulation, testing, systems changes, packaging destruction and lost capital behind products designed for the previous model. Companies cannot reformulate everything. They need a ruthless portfolio triage: defend strategic platforms, redesign viable products and exit the rest. The reformulation runway is finite. Spreading technical resources evenly across 15,000 products guarantees mediocrity and margin compression.

Thought Leadership Pieces, July 2026 Edition:

CLUSTER 3

Supply chains, commodities and processing inputs

TL-23. Iran Conflict Exposes Food's Hidden Dependence on Gulf Inputs

FoodNavigator* | *Read Article

FoodNavigator identified eight major food-sector casualties from the Iran conflict as disruption spread beyond energy into food security and industrial supply chains. The pressure points included shipping through the Strait of Hormuz, fuel and fertilizer availability, petrochemical inputs used in packaging, freight costs and the operating economics of food production. Earlier shortages had already affected snack packaging and raised concerns over agricultural output in import-dependent markets. The article framed the conflict as a system-wide shock rather than a temporary commodity-price event.

> **SO WHAT:** The non-obvious read is that the food system's exposure to the Gulf sits inside factories as much as farms. Energy, fertilizer, resins, transport and industrial gases enter different cost lines, but a single geopolitical shock can move them together. That correlation defeats procurement strategies built around diversifying suppliers within the same vulnerable system. The broader implication is that resilience requires redesigning specifications, packaging materials, energy sources and inventory policies—not merely negotiating harder after prices rise. Geopolitical risk has become an operating input, and plants that cannot substitute quickly will absorb the margin compression.

TL-24. UK Food Export Volumes Fall to a Decade Low

Food Manufacture* | *Read Article

UK food and drink exports fell 4.8% year on year to £5.7 billion in the first quarter of 2026, while volumes declined 8.9% to 2.0 billion kilograms. The Food and Drink Federation said this was the lowest first-quarter volume in a decade outside the pandemic and roughly one-third below 2019 levels. Non-EU exports dropped 11%, including declines of 27.9% to the US and 18.5% to China. Imports rose 2.6% to £16.3 billion, widening the competitive imbalance.

> **SO WHAT:** The problem is not weaker exports alone; it is the widening gap between what UK plants make and what the domestic market increasingly imports. Falling volume removes operating leverage from factories, while higher inbound competition limits the pricing needed to recover energy, labour and regulatory costs. The second-order effect is a slower reinvestment cycle: underutilized plants cannot fund automation or reformulation at the pace of stronger overseas competitors. Trade support will help, but the structural answer is improved factory productivity and products differentiated enough to travel despite distance, tariffs and border friction.

TL-25. US Tariffs Cut UK Food Exports by Nearly 28%

Just Food* | *Read Report

US tariffs combined with continuing pressure in Europe to drive UK food and drink export volumes down 8.9% in the first quarter of 2026. Exports to the US fell 27.9%, making it one of the sharpest market declines, while salmon exports dropped by about 40% in both value and volume. The Food and Drink Federation warned that UK manufacturers were losing ground as tariff exposure compounded post-Brexit friction and high domestic operating costs. Total first-quarter export value fell to £5.7 billion.

> **SO WHAT:** The US decline shows how quickly a growth market can become a capacity problem when tariffs change the delivered-cost equation. Exporters cannot recover a near-28% market contraction through commercial effort alone if the product lands structurally uncompetitive. Plants built around premium overseas demand then carry fixed costs back into the domestic business. The broader read-through is that export strategies need market-level contribution tests that include tariff volatility, not headline revenue ambitions. When access weakens, manufacturers must redirect volume quickly, reformulate for alternative markets or rationalize lines before temporary trade friction becomes permanent underutilization.

TL-26. CPTPP Opens Mexico Further to UK Pork and Dairy

***Food Manufacture* |** *Read Report*

The UK gained enhanced access to Mexico when the Comprehensive and Progressive Agreement for Trans-Pacific Partnership entered into force between the two countries on 22 June 2026. The new terms improve trading conditions for food and drink exporters, including pork and dairy businesses, through preferential tariffs and clearer trade rules. UK guidance also highlighted lower tariffs for products such as coffee and access to CPTPP provisions on origin and digital trade. The agreement operates alongside the existing UK–Mexico continuity arrangement.

> **SO WHAT:** Market access only creates value when manufacturers convert it into customer contracts before competitors occupy the space. Mexico offers scale in meat, dairy and processed foods, but exporters still need local specifications, dependable cold chains and pricing that survives freight. CPTPP reduces the border penalty; it does not eliminate commercial execution. The second-order effect is a stronger case for processors to build regional distributor partnerships and configure products specifically for Mexican demand rather than treat the country as overflow for UK production. Trade agreements open the decision window. Operating readiness determines who captures it.

TL-27. Nutrient Density Supports Defensible Premium

Rabobank* | *Read Article

RaboResearch connects protein demand with GLP-1 adoption, affordability pressure and scrutiny of ultra-processed foods. It argues that nutrient density can help packaged products justify higher prices by delivering more nutrition per calorie and per dollar.

> **SO WHAT:** Premiumization is shifting from indulgence and branding toward demonstrable nutritional efficiency. Ingredient suppliers will need to provide protein systems that solve taste, texture, stability and cost-in-use challenges, rather than competing only on the number of protein grams added.

TL-28. FAO Warns Input Shocks Could Disrupt Otherwise Stable Food Markets

FAO | ***Read Report***

FAO's biannual Food Outlook reviewed cereals, oilseeds, vegetable oils, sugar, meat, dairy, fish, freight, fertilizers and biofuels. It described the overall supply outlook as relatively favorable, with cereal output expected to remain historically high despite easing from previous records. However, the assessment warned that energy, fertilizer, weather and geopolitical shocks could quickly alter availability and trade economics. The global food-import bill was estimated to have risen 7.9% in 2025.

> **SO WHAT:** Comfortable headline supply is not the same as stable delivered cost. Processors buy freight, energy, financing and policy risk alongside the commodity. A small disruption at any link can overwhelm a modest decline in crop prices. The correct response is not blanket hedging. It is input-by-input exposure mapping: origin concentration, substitution limits, inventory cover and energy intensity. The supply floor looks adequate. The conversion-cost floor does not.

TL-29. USDA Grain Balances Frame Milling and Feed-Cost Risk

USDA FAS | ***Read Report***

USDA's June Grain: World Markets and Trade report updated global production, consumption, trade and ending-stock estimates for wheat, rice and coarse grains. The monthly dataset tracks major exporters and importers and translates crop conditions, government policies and trade flows into commodity balances used across milling, starch, cereal, brewing and animal-protein supply chains.

> **SO WHAT:** Grain processors should watch exportable surplus, not global production headlines. A large crop trapped behind tariffs, logistics or domestic mandates does nothing for a mill in another market. Regional balance-sheet changes become flour, starch and feed-margin pressure with little warning. Procurement teams need to connect USDA revisions to formulation flexibility, customer pricing and plant utilization. Grain intelligence is not an economist's appendix. It is the starting point for conversion-margin control.

TL-30. Europe's Cost Base Will Reappear in Prices

Rabobank | ***Read Report***

RaboResearch assesses rising energy, packaging and other manufacturing costs that are likely to flow through to European food prices, despite manufacturers and retailers attempting to delay or limit increases.

> **SO WHAT:** Weak volumes and retailer resistance will prevent companies from recovering every cost increase through pricing. Manufacturers will need to combine selective pass-through with pack changes, reformulation, productivity programmes and contract resets. Suppliers offering measurable cost reduction without visibly weakening quality will gain importance.

TL-31. Tomato Buyers Have a Temporary Window

Rabobank **|** ***Read Report***

Rebuilding inventories, strong yields and adjustments in global processing-tomato supply are placing near-term pressure on prices. However, regional quality differences and potential future supply tightening remain important.

> **SO WHAT:** The opportunity is not simply to buy tomatoes more cheaply; it is to reset the supply base before the cycle turns. Softer prices give sauce and prepared-food manufacturers leverage to secure higher-quality volumes, diversify origins and lock in contracts while inventories remain comfortable. Buyers that treat today's abundance as structural will be exposed when acreage, weather or inventory corrections tighten supply again.

TL-32. USDA Oilseed Outlook Tracks Oils, Meals and Protein Inputs

USDA FAS **|** ***Read Report***

USDA's June oilseed report updated global production, crushing, trade and stock expectations across soybeans and other oilseeds, together with vegetable oils and protein meals. The balances provide direct visibility into inputs used in frying, bakery fats, emulsification, plant-protein systems and livestock feed. They also capture the growing interaction between food demand, crushing economics and biofuel policy.

> **SO WHAT:** The soybean is no longer one market. Oil, meal, protein ingredients and fuel credits pull the crush in different directions. A processor buying one output remains exposed to economics created by the others. That makes crush margins and policy mandates as important as harvest size. Food manufacturers need alternative-oil qualification, dual sourcing and recipe tolerances before volatility arrives. Reformulation under pressure is expensive. Approved substitution is cheap optionality.

TL-33. FAO Reports Continued Inflation in Oilseed and Meal Prices

FAO **|** ***Read Report***

FAO's June monthly update reported that its international oilseed and oil meal price indices increased by 2.6% and 2.2%, respectively, during May 2026. The report tracks international prices across oilseeds, vegetable oils and meals, connecting changes to crop prospects, trade flows and demand conditions. It provides a more precise read on processing inputs than broad food-price measures.

> **SO WHAT:** Oilseed inflation works through multiple operating lines at once: cooking oil, shortenings, lecithin, protein concentrates and feed. That makes it a multiplier, not a single procurement issue. Manufacturers should quantify total portfolio exposure rather than negotiate each ingredient in isolation. The leading indicator is broad-based movement across seed and meal indices. When both rise together, substitution becomes harder and suppliers gain leverage. Pricing decisions need to move before monthly averages become contracted costs.

TL-34. OECD – FAO Sees 13% Production Growth but Persistent Volatility

OECD and FAO* | *Read Report

The OECD–FAO outlook forecasts global agricultural and fish production to increase 13% by 2035, while direct agricultural greenhouse-gas emissions rise 6%. Gross agricultural income per worker is projected to grow 9%. The report expects broadly stable real commodity prices over the decade but warns that conflict, energy costs, fertilizer exposure and climate shocks will continue driving volatility. Southeast Asia is expected to contribute 39% of global consumption growth.

> **SO WHAT:** Long-term supply growth does not eliminate short-term disruption. It increases the premium on assets that can switch origins, ingredients and product mix when shocks hit. Capacity decisions based only on average commodity prices will look smart until the first corridor closes. The other read-through is geographic: more demand growth in Southeast Asia changes where processing, storage and ingredient capacity should sit. The next decade rewards flexible regional platforms, not giant plants built around one static trade flow.

TL-35. Vegetable Oils Rise 3.8% as Sugar Falls 5.7%

FAO* | *Read Report

FAO's Food Price Index averaged 130.3 points in June, down 0.3% from May but 1.7% above the prior year. Cereal prices fell 3.5%, sugar declined 5.7% and dairy prices decreased 1.5%. Vegetable-oil prices rose 3.8% month on month and 23.3% year on year, while the meat index increased 0.4% to a record level. The overall index remained 18.7% below its March 2022 peak.

> **SO WHAT:** A flat headline index hides violent divergence underneath. A bakery or prepared-food plant can face lower sugar costs and higher fats, oils and protein costs in the same month. Portfolio-level inflation averages therefore mislead pricing and sourcing decisions. Companies need recipe-weighted input indices by category and customer contract. The commercial advantage goes to manufacturers that translate commodity divergence into selective pricing and reformulation. Across-the-board increases are lazy. Across-the-board freezes are worse.

TL-36. EU Milk Growth Raises the Stakes on Product-Mix Discipline

USDA FAS* | *Read Report

USDA's EU dairy semi-annual report forecast an increase in 2026 milk production and assessed how volumes would be allocated across cheese, butter, skimmed-milk powder, whole-milk powder and other dairy products. It also examined herd trends, domestic use, processing economics and export prospects across the European Union.

> **SO WHAT:** More milk does not guarantee better processor margins. Value depends on where the solids go. Cheese, butter and powders compete for the same milk pool but carry different energy, storage and export economics. Processors need product-mix flexibility before supply rises, not after warehouses fill. Plants locked into low-return formats become price takers. The durable advantage belongs to networks that redirect components rapidly toward the strongest customer and margin signal.

TL-37. New Zealand Milk Output Heads for Record 22.1 Million Tonnes

USDA FAS* | *Read Report

USDA forecast New Zealand's 2026 fluid-milk production at a record 22.1 million tonnes. The report assesses how the country's export-oriented processing system is likely to allocate milk across powders, butter, cheese and higher-value ingredients. Because domestic consumption absorbs only a limited share, production and product-mix decisions remain heavily exposed to international demand and freight economics.

> **SO WHAT:** Record milk supply puts utilization pressure on the processing network. The question is not whether New Zealand can produce the milk; it is whether processors can convert it into the right products at the right margin. Commodity powder capacity provides a floor, but specialized ingredients capture the upside. When global demand softens, inflexible plants become inventory machines. Product-mix agility, energy efficiency and committed export channels will determine who converts the record into profit.

Thought Leadership Pieces, July 2026 Edition:

CLUSTER 4

Formulation, ingredients and innovation

TL-38. Big Food’s 1.5% R&D Spend Cedes Innovation to Challengers

Boston Consulting Group* | *Read Report

BCG found that large food and beverage companies invested only 1.5% of sales in R&D between 2015 and 2025, while spending 6%–15% of 2025 revenue on advertising and promotion. Global CPG R&D expenditure grew about 1.2% annually, compared with 2.6% for advertising. Many breakthrough platforms—including prebiotic beverages, plant-based dairy and clean-label products—were developed by challengers rather than incumbents.

> **SO WHAT:** Big Food did not lose innovation because consumers became impossible to understand. It lost because marketing budgets replaced technical capability. That bill has arrived. Reformulation, ingredient functionality, process design and equipment know-how now determine whether a company can answer nutrition, clean-label and cost demands simultaneously. Acquiring challengers can fill portfolio holes, but it does not rebuild the engine. Advertising can amplify a relevant product. It cannot rescue an obsolete formulation. That is not brand theory. It is productivity math.

TL-39. Europe Targets the Industrial “Valley of Death” in Food Innovation

FoodDrinkEurope* | *Read Report

FoodDrinkEurope urged the EU to fund food-manufacturing innovation through technology-readiness levels 5–8, covering pilot work, demonstration and industrial deployment. The position prioritizes reformulation, biotechnology, digital production, side-stream utilization, sustainable ingredients, food-safety tools and scalable processing technologies. It argues that fragmented programmes and complex applications prevent smaller manufacturers from moving promising science into commercial production.

> **SO WHAT:** Food innovation rarely dies in the laboratory. It dies when the pilot batch must run through a real factory at a real margin. Scale-up funding can unlock fermentation, functional ingredients and lower-impact processing, but only where companies own the manufacturing problem. The advantage will go to businesses that combine scientists, engineers and commercial teams early. A prototype is not a product. Until it can be produced consistently, sourced securely and sold profitably, it remains a research expense.

TL-40. Dairy Fractionation Opens Higher-Value Functional Platforms

Institute of Food Technologists* | *Read Report

IFT examined how filtration, fractionation, enzymatic processing and separation technologies are expanding dairy beyond conventional milk products. US fluid-milk sales fell from more than 55 billion pounds in 2009 to about 42.8 billion pounds in 2023, increasing pressure to capture value from individual components. Milk and whey proteins, milk-fat-globule membrane, bioactive peptides and specialized carbohydrates are moving into infant nutrition, sports products, immune support and gut- and cognitive-health applications.

> **SO WHAT:** Dairy's future is not more gallons. It is better component economics. Processors that separate milk into targeted proteins, lipids and bioactives can escape commodity pricing and serve faster-growing applications. But specialized ingredients demand tighter composition, microbiological control and customer-specific performance. Old plants built around bulk volume will struggle to compete without targeted upgrades. The structural divide is clear: processors that sell milk solids as engineered functionality gain margin and category control; those that sell undifferentiated volume remain exposed to the commodity cycle.

TL-41. Gluten-Free Testing Breaks Down After Processing

BRCGS* | *Read Report

BRCGS examined why gluten verification becomes unreliable after baking, extrusion and fermentation alter protein structures. Test results can vary by antibody, extraction chemistry, calibration material and food matrix, complicating verification against the 20 milligrams-per-kilogram gluten-free thresholds. The report calls for common method-performance criteria and better understanding of how different processing conditions affect analytical recovery.

> **SO WHAT:** A gluten-free claim can fail before the product is ever contaminated, if the test method cannot detect the protein after processing. Bread, beer, extruded snacks and fermented products alter gluten differently, so one standard assay cannot be treated as universally reliable. Method selection must therefore be product-specific and validated against the actual manufacturing process. Companies with robust analytical systems can defend claims, avoid false failures and protect category access. Those relying on supplier certificates or unvalidated test results are staking market access.

TL-42. Ice-Cream Reformulation Must Solve Freezing Physics, Not Just Sugar

Food Standards Agency Northern Ireland and CAFRE* | *Read Report

The Food Standards Agency in Northern Ireland and the College of Agriculture, Food and Rural Enterprise released a 12-page guide to help businesses produce healthier ice cream and gelato. The guidance supports reformulation around sugar, fat and calorie reduction while recognizing that ingredient changes affect sweetness, freezing behavior, body, texture and product stability. It is intended to help manufacturers structure development trials rather than simply remove nutrients from existing recipes.

> **SO WHAT:** Ice cream exposes the lie that reformulation is ingredient subtraction. Sugar controls freezing point. Fat controls body and flavour delivery. Remove either carelessly and the product becomes hard, icy or thin. Manufacturers need system solutions – sweetener blends, bulking agents, stabilizers and process changes, not heroic reductions on a spreadsheet. The opportunity

> is significant, but the technical floor is unforgiving. Brands that preserve indulgence while improving nutrition gain reformulation runway. Those that optimize the label and destroy the eating experience will train consumers not to repurchase.

TL-43. Cultivated Duck Assessment Sets the Manufacturing Evidence Floor

Food Standards Australia New Zealand | [*Read Report*]

FSANZ opened consultation on cell-cultured duck biomass produced by Gourmey from a Pekin-duck embryonic stem-cell line. The assessment covers cell-line identity, culture media, production controls, composition, microbiological and chemical specifications, intended uses and labelling. The ingredient would be supplied wholesale or incorporated into mixed foods; proposed labels must use "cell-cultured" or "cell-cultivated," while use of conventional poultry-meat terminology would be restricted.

> **SO WHAT:** Cultivated food is being regulated as a manufacturing platform, not a futuristic ingredient. Cell-line stability, media inputs, contamination controls and batch consistency will determine market access. That raises capital and documentation requirements long before scale economics are proven. The first approvals will set precedents that later entrants must match. Companies that design regulatory evidence into the process gain a durable lead. Those that optimize yield first and assemble the safety case later will discover that a productive bioreactor can still be a stranded asset.

TL-44. Sustainability Targets Are Rewriting Machinery Specifications

PMMI | [*Read Report*]

PMMI found that 82% of manufacturers and co-packers were pursuing packaging-sustainability initiatives, while 64% of machinery suppliers said those objectives were already changing equipment design. More than half of end users reported that existing machinery limits their ability to adopt new packaging. Companies are moving towards lightweight formats, post-consumer recycled content, smaller packs and reduced secondary packaging, but many current lines cannot handle these materials consistently.

> **SO WHAT:** The packaging transition will be won or lost on the factory floor. A recyclable film that tears, jams or slows throughput is not sustainable; it is margin compression with better branding. Equipment specifications now need wider material windows, faster changeovers and better tension, sealing and inspection control. That changes capital planning. Manufacturers that postpone machinery upgrades will face a growing gap between stated packaging commitments and what their lines can actually run.

Thought Leadership Pieces, July 2026 Edition:

CLUSTER 5

Packaging, circularity and producer regulation

TL-45. ECHA Moves TFA Towards Stricter Hazard Classification

European Chemicals Agency* | *Read Report

ECHA's Committee for Risk Assessment recommended classifying trifluoroacetic acid as persistent, mobile and toxic; very persistent and very mobile; and toxic to reproduction. TFA is a degradation product of several PFAS, including substances used in some food-contact materials. The opinion now moves into the EU regulatory process and could support tighter controls on chemicals that break down into TFA.

> **SO WHAT:** The regulatory target is expanding from individual PFAS compounds to what they become after use. That changes substitution strategy. Replacing one fluorinated chemistry with another that degrades into the same persistent endpoint is not risk reduction; it is delayed liability. Packaging manufacturers need to assess degradation pathways, not simply check whether a named substance appears on today's restricted list. TFA is a leading indicator. The chemical-control floor is moving towards lifecycle evidence, and suppliers unable to provide it will lose specification access.

TL-46. New York's Packaging Bill Stalls, but the Cost Signal Remains

Packaging Insights* | *Read Report

New York's Packaging Reduction and Recycling Infrastructure Act failed to reach a final Assembly vote for the third consecutive year, despite passing the Senate. The proposal retained targets including a 30% reduction in packaging over 12 years, restrictions on designated toxic substances and producer-funded recycling programmes. Lawmakers had introduced nearly 150 amendments to address concerns from plastics and packaging groups. Industry organizations warned of higher costs and disruption to established recycling systems, while environmental groups argued that producers must carry more responsibility for packaging waste.

> **SO WHAT:** The mistake would be reading the failed vote as regulatory relief. Extended producer responsibility is spreading across US states, and manufacturers must now design against a moving patchwork rather than a single national rule. New York may have delayed the bill, but the commercial signal is unchanged: packaging weight, material choice and recyclability will increasingly affect cost-to-serve. The second-order effect will be faster portfolio simplification as companies identify packs that become uneconomic under variable state fees. Waiting for complete legal certainty is not prudence; it simply leaves less time to redesign once the rules become unavoidable.

TL-47. EU Retailers Demand a 12-Month PPWR Grace Period

Just Food* | *Read Report

EuroCommerce, representing European retailers and wholesalers, called for a 12-month grace period as the EU Packaging and Packaging Waste Regulation begins applying from 12 August 2026.

The association argued that key technical details remained unclear only weeks before implementation, while businesses face measures phased in across different dates. PPWR introduces requirements covering packaging minimization, recyclability, reuse, labelling and producer responsibility, creating extensive changes for packaged-food suppliers and their customers.

> **SO WHAT:** The request exposes a familiar regulatory failure: legislation can be final while the operating instructions remain unfinished. Food companies must still make packaging investments, supplier commitments and artwork decisions before every technical question is resolved. That transfers interpretation risk from policymakers to the supply chain. The broader implication is that packaging governance must move upstream into product development rather than sitting with compliance teams after launch. Suppliers able to document materials, recyclability and reuse performance will gain preference, while those selling technically adequate but poorly evidenced packs will become the delay point in customers' transition plans.

TL-48. Recycled Plastic Ambition Outruns Chemical-Safety Evidence

Food Packaging Forum **|** *Read Report*

Food Packaging Forum challenged an FAO assessment of recycled-plastic food-contact materials, raising six concerns regarding scientific framing, evidence interpretation and risk assessment. The organization argued that contamination, chemical mixtures, migration and micro- and nano plastic exposure were understated. It also warned against treating recycled plastic as inherently safe merely because it supports circularity objectives.

> **SO WHAT:** Recycled content is becoming a regulatory and customer requirement but recycled does not automatically mean food-safe. That collision will define packaging investment. Manufacturers need material-specific migration evidence, input-stream controls and supplier transparency before committing entire portfolios. A circularity target without chemical assurance creates a future reformulation problem in the package itself. The decision cannot sit with procurement alone. Packaging engineering, toxicology, operations and commercial teams must sign the same risk.

TL-49. Packaging Audits Tighten Traceability and Recall Testing

BRCGS* | *Read Report

One year after Packaging Materials Issue 7 took effect, BRCGS highlighted recurring questions around traceability, traded products and supplier approval. Clause 3.14.5 requires at least one annual test of recall and withdrawal procedures. Manufacturers must verify suppliers' traceability systems, while materials sourced through brokers require risk assessment and documented approval. Primary and secondary food-contact packaging face more rigorous traceability expectations than lower-risk tertiary formats.

> **SO WHAT:** Packaging suppliers are no longer peripheral vendors. One undocumented resin, coating or converter can break the food manufacturer's traceability chain. Annual mock recalls must

> test actual material genealogy, not produce a comfortable slide deck. Food companies should know which finished lots used each film, ink and adhesive within hours. Packaging complexity has outrun many quality systems. The supplier that can prove control will gain share. The one that cannot becomes an unpriced recall liability.

TL-50. State EPR Fees Could Consume 1% of Sales

EY | ***Read Report***

Seven US states have enacted packaging extended-producer-responsibility laws, with additional bills progressing during 2026. EY estimates that EPR fees could reach as much as 1% of sales in each jurisdiction. Requirements differ across covered materials, reporting schedules, fee structures and producer definitions. Proposed penalties range from $5,000 per day for each violation in Missouri to $100,000 per day for each non-compliant product line in Wisconsin.

> **SO WHAT:** Packaging has moved from a sustainability line item into product economics. A 1% charge can erase the margin on a mature SKU before resin, labour or freight move one cent. The larger exposure is fragmented packaging data: manufacturers that cannot map materials to individual products will struggle to report accurately or redesign intelligently. One national packaging strategy will not satisfy seven different regimes. The winners will build SKU-level material intelligence, model fees before launch and remove expensive formats before regulators price the decision for them.

OUR TEAM

Meet our author and experts

As Group Chief Strategy Officer and Global Practice Lead for Food, Agriculture & Nutrition at FutureBridge, I have shaped my work over more than two decades of leadership across complex, regulated, and innovation-driven industries. The focus has consistently been on helping organizations navigate structural shifts in demand, regulation, and technology with greater clarity and confidence.

What defines this approach is a combination of strategic rigour, practical insight, and a strong focus on outcomes. Deep experience across food, agriculture, and nutrition continues to inform how clients assess change, unlock opportunities, and make critical decisions in evolving markets.

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ABOUT
FutureBridge

FutureBridge is a global innovation and strategy consulting firm that helps companies anticipate disruption, decode emerging markets and technologies, and convert future signals into growth decisions. The firm works with leadership teams across food and nutrition, life sciences, energy, chemicals, mobility and industrial sectors to support innovation strategy, market intelligence, technology scouting, portfolio prioritization and future ready growth planning.

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