

Collaborating For Action — 2022 Review

The Consumer Goods Forum



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Executive Summary — Testing Our Resilience

The Consumer Goods Forum (CGF) is unique in that we bring together consumer goods retailers and manufacturers from all over the world to drive positive change. When the CGF released its first annual report in 2021, the world was dealing with COVID-19, and the CGF and the industry swiftly went to work on some of the immediate issues that needed to be addressed. In 2022, the challenge has now shifted to juggle the multiple crises of inflation, conflict, and supply chain while also staying attuned to the longer-term sustainability goals.

Meeting Industry Priorities Through Our Coalitions

2022 turned out to be another year of unanticipated economic, environmental, social and geopolitical disruption. It is testament to the agility and resilience of the leaders who represent their companies on the CGF Board — and as members of the Coalitions of Action — that they collectively and individually stepped up to these challenges and ultimately the greatest priorities, with undeterred resolve.

The goal of each of the 8 Coalitions is to help drive change and accelerate impact on critical industry-wide issues through collaborative efforts across companies and geographies. All have made progress against their stated goals this year.

Our 8 Coalitions of Action



Food Waste — A global commitment to reducing food waste.



Forest Positive — Taking collective action for a forest positive future.



Food Safety — Safe food for people everywhere.



Collaboration for Healthier Lives — Empowered healthier people globally.



Human Rights — Working to End Forced Labour — Working together to eradicate forced labour from consumer goods supply chains.



Plastic Waste — Playing a leading role in eliminating plastic waste on land and in sea.



Product Data — Tackling today's biggest data exchange challenges.



Sustainable Supply Chain Initiative — Building trust in sustainability standards worldwide.



Making Progress Through the Coalitions of Action

Amongst other examples, the disruptive events of 2022 highlighted the immediate economic and social impact of issues such as [food waste](#), longer-term sustainability concerns regarding [plastic waste](#), and making progress in ensuring that [product data](#) is accurate, consistent and easily exchanged.

Built on its commitment to transparency, the [Forest Positive Coalition](#) released its [second annual report](#) at New York Climate Week in September, which illustrates how the Coalition members are now collectively reporting on their total deforestation metrics.

The disruptions of the past year made access to food, health, personal care and hygiene products an increasingly critical issue. In this context, the scope of the [Collaboration for Healthier Lives](#) was broadened to address some of the issues that were interfering with consumers' access to products.

The [Human Rights Coalition — Working to End Forced Labour](#) launched its [People Positive Palm Project](#) in October to drive collaboration between consumer goods companies and palm oil suppliers in Malaysia to address the issue of forced labour in the Malaysian palm oil sector.

Building food safety capability is a strategic priority for the [Global Food Safety Initiative](#) and the pace of change was stepped up in maturing markets across the world. GFSI also convened the first CGF post-pandemic in-person gathering, with 600 delegates in attendance at the [GFSI Conference 2022](#).

2022 was a pivotal year for the [Sustainable Supply Chain Initiative](#) as well, with six schemes undergoing the benchmarking process for third-party sustainability certification and SSCI recognition.

The full report details the actions of each Coalition. The past two years have been a test of resilience for the CGF and its members. The progress that has been made is a tangible example of their commitment to continue to work together in the best interests of the consumer goods manufacturers, retailers and consumers, as well as society more broadly.

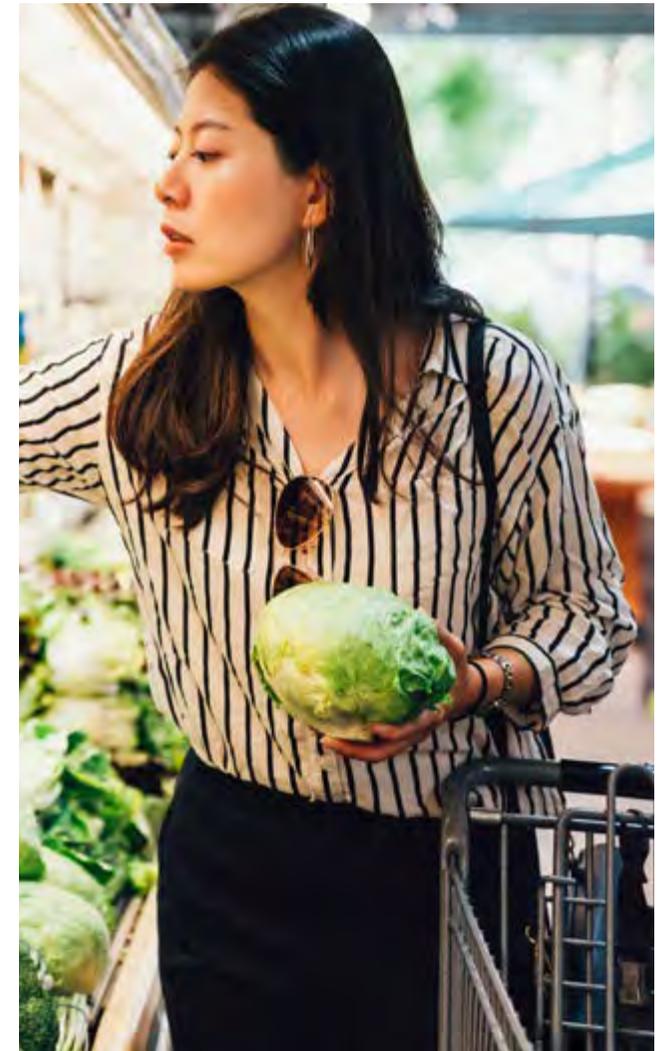
Reconvening the Industry

One of the unique characteristics of the CGF is the ability to convene CEOs and other senior leaders from the world's most influential manufacturers and retailers, to share information and learn from each other on a pre-competitive basis. The leaders from CGF member companies actively participate in working groups and steering committees throughout the year, and collaborate with NGOs and other external stakeholders on special projects. They also play a critical role in the Coalitions of Action by working together to develop concrete solutions on major issues that are affecting the industry now and in the future.

In order to drive positive change as broadly as possible, members in various regions tailor the global strategies of the CGF Coalitions of Action to ensure they are relevant and actionable at a local level. The regional offices in China, EMEA, Japan, Latin America and North America were very active this year in engaging directly with their local members. CGF's regional outreach is critically important for bringing key regional players together to share their knowledge, adapt global actions to the requirements of the region and evaluate their impact and progress at the local level.

The combination of global events such as the Global Summit, GFSI Conference, Sustainable Retail Summit, Supply Chain Conference and Future Leaders Programme, combined with regional events and

outreach, reflects CGF's strategy to address industry issues on a global scale, while implementing actions at the local level to ensure they have a tangible impact in individual regions.





Leadership in Disruptive Times

The disruptive environment of the past two years has amplified the importance of The Consumer Goods Forum's mission to influence responsible business practices around the world, and to ensure its vision of "Better Lives Through Better Business." It has solidified member companies' commitment to work together and take action on longer-term industry issues.

The need to act on the most pressing sustainability issues has never been stronger. Price volatility in fossil-based energy supplies has intensified the focus on renewables. Disrupted supply chains have highlighted the need to create sustainable and local sources for raw materials. The global cost-of-living crisis has put additional strains on household budgets, and there is a need to scale efforts quickly to reduce food waste and make healthy and sustainable products accessible *and* affordable.

Rarely has there been a greater test of the industry's adaptability in continuing to advance these ideals.

All of the current issues fall within the remit of the CGF's 8 Coalitions of Action. This has reconfirmed that CGF members have identified the right priorities and that no company can tackle these far-reaching

global issues alone. These focused priorities are the North Star that guides the actions of industry leaders and encourages them to work in solidarity to drive positive change within the industry and for the benefit of consumers and society.



The Coalitions are the vehicles that are driving us toward achieving our ultimate goals. Each one has a clear agenda, well-developed plans and targets, and very clear governance practices. The members of each Coalition of Action have been resilient and made real progress in most areas this year. They didn't crumble under the weight of unpredictability, and they continued to stay focused to maintain their momentum on many important projects. ”

Daniel Zhang

CGF Board Co-Chair and Chairman & CEO
Alibaba Group, China





Maintaining Momentum

The strength of the CGF members' commitment has been built over the course of several years, and it is anchored by an environment of collaboration and trust amongst retailers and manufacturers. With attention to the critically important issues that consumers, manufacturers and retailers are confronting today — while not losing sight of their longer-term priorities — the Coalitions have been able to maintain momentum this year. In some cases, it was necessary to re-prioritise the actions in some areas, adapt some plans, and slow the pace in others.



Despite challenges in the operating environment, we continue to drive forward and make progress. We are measuring metrics against milestones and are beginning to see progress. Now, we're ready to build momentum and achieve substantive progress. It's time to take it higher. ”

James Quincey

CGF Board Co-Chair and Chairman & CEO
The Coca-Cola Company

Nevertheless, the long-term ambitions of the Coalitions and the commitment of their members remains strong.

New Opportunities for Further Cross-Coalition Collaboration

As the Coalitions continued their progress through 2022, the opportunity for stronger cross-Coalition collaboration became more visible. The interdependencies are inherent and have always been there, and the Coalitions are finding new areas to contribute to each other's objectives. For example, the issue of food waste is closely linked with environmental targets: by reducing food waste, the carbon footprint can also be reduced, in the same way as food waste reduction can also contribute to food safety.

Similarly, with regard to plastic waste, the focus is not exclusively on recycling and eliminating plastic waste, but also on reducing the carbon footprint by eliminating the use of virgin plastic. The Sustainable Supply Chain Initiative's collaboration on social sustainability issues with the Human Rights Coalition — Working to End Forced Labour potentially brings the issues of deforestation and forced labour to the same table, with SSCI developing the tools and resources for businesses to address their environmental and social risks together.

The Coalitions will continue to focus on their individual targeted priorities for action, while also sharing their learnings and expertise and aligning their actions throughout the entire value chain to achieve the industry's collective objectives.

Reigniting the Power of Human Connections

Collaboration and collective action are central to achieving CGF's mission and making progress in member companies. Person-to-person connectivity and opportunities for open dialogue are essential for successful collaborative efforts. Whilst CGF virtual events over the past two years kept people informed, the opportunities for open dialogue and building personal connections were clearly constrained.

After more than two years of virtual gatherings, over 600 of these leaders enthusiastically reconvened in person for the first time at the CGF's GFSI Conference in Barcelona in March. Working across boundaries to ensure safe and sustainable food everywhere has never been more critical, and the conference theme, "Delivering Impact for Safe Sustainable Food", affirmed the Global Food Safety Initiative's role in addressing this challenge.

A few months later, in June, a sold-out delegation of over 700 delegates arrived in Dublin for the Global Summit, the CGF's flagship annual event. The Summit theme, "From Resilience to Reinvention: Responsible Growth in the New Era," reflected members' readiness to move beyond 'reacting and adapting' to world events to 'working together to implement urgent and lasting solutions' in several critical areas.

The greatest takeaways from this year's Summit reinforced the power of human connections; the need for the CGF and the industry overall to balance both the short-term and long-term challenges; and the critical role of collaboration and collective action. This in-person event also gave us a firsthand view of the growing diversity of the industry, and the importance of diversity and inclusion as a wellspring of creative ideas and innovations.



The Future Leaders Programme is designed to prepare the next generation of the industry's leaders for future roles in the C-suite. A new format was introduced this year, and 50 carefully selected rising stars from CGF member companies participated in a series of eight virtual sessions from January to June, and met at an in-person module at the Global Summit.

Two additional, targeted global events included the Supply Chain Conference and Sustainable Retail Summit, which were held back-to-back for the first time in Amsterdam in October. The Supply Chain Conference gave the delegates an opportunity to contribute to potential actions for balancing the collective need to address retailers' short-term challenges, while not losing sight of the longer-term sustainability and supply chain goals.

The new era of health and sustainability is set to shape the industry. The Sustainable Retail Summit gave the delegates an opportunity to learn about how to reinvent their business models and take positive action today.

The importance of diversity, equity and inclusion has long been an important value of the CGF. Within our own organisation, 75 percent of the employees are female, as are 50 percent of the CGF Management Committee members and 37 percent of the Coalition Co-Chairs. We have improved the gender balance of delegates and presenters at our events with an average of 44 percent female speakers at our Global Summit, GFSI Conference and Sustainable Retail Summit.

Diversity, equity and inclusion is key to achieving greater inclusivity and renewal throughout the industry as well. It's important for industry members to be able to tap into the unique experiences and expertise of as many people as possible, by ensuring that everyone has a seat at the table. The CGF has a role to play in achieving this objective. This year, for example, we made some operational changes that provide opportunities for a variety of executives to represent their company CEOs at the board room table. We have appointed a diversity champion for the CGF and are currently developing a series of management programmes to progress these diversity goals even further.



We have a diversity, equity and inclusion mandate, and to further it, we are ensuring as many operational areas as possible reflect our aspirations.

Wai-Chan Chan
Managing Director
The Consumer Goods Forum



Daniel Zhang
CGF Board Co-Chair and
Chairman & CEO
Alibaba Group, China



James Quincey,
CGF Board Co-Chair and
Chairman & CEO
The Coca-Cola Company



A Perspective on 2022 — Expanding Regional Outreach and Increasing Impact

The combination of the pandemic and the war in Ukraine triggered previously unimagined crises over the past three years, and it required companies to react quickly and look for solutions for these pressing matters. In the aftermath of this uncertainty, new emergencies have risen — such as an increase in energy and living costs, market turbulence, and a new imbalance between short-term constraints and long-term challenges.

When the governance model for the Coalitions of Action was first introduced, the majority of our energy and attention was directed at the development of detailed action plans and in recruiting active Coalition members from both the manufacturing and retail sectors.

Then, despite the unpredictable circumstances of 2022, our attention turned to actively implementing these action plans amongst the member companies of the Coalitions.

As we look forward, it is difficult to have a clear view of 2023, but we do know that the long-term needs of the industry — and its critical role in society — are unwavering. It is why the Coalitions exist, and the disruptions of the past two years have reinforced our resolve to expand our regional outreach and implement actions that have meaningful local impact.

We have the right priorities and the right way of working; we are gathered around the same North Star that guides the industry's goals. We know that not all of the Coalitions will move at the same speed. There are different opportunities and challenges that each is addressing; and it requires agility to cope with changes in circumstances. The task at hand is to follow through and implement what we said we were going to do throughout the CGF membership, and for each Coalition to continue to measure and report on their KPIs.

It is now more a question of pace. The challenge in 2023 will be in closely monitoring global circumstances while also maintaining as many opportunities as possible for people to come together, share best practices and work on concrete actions and solutions.

As I said at this year's Global Summit, we have done a great deal of planning, and it is time to "do, do, do." This is why collaboration is so central to the actions that need to be taken for leaders of the consumer goods industry to achieve impact at scale.

We are making progress, but the time has come to accelerate our collective effort. I encourage you to follow through on our commitment to set targets, and to begin measuring and reporting on the impact we are having on the industry and on consumers. Together, this is how we will achieve our goals.



Wai-Chan Chan
Managing Director
The Consumer Goods Forum



The Power of Connections — Networking and Knowledge Sharing on a Global Regional Scale

The CGF convenes groups of industry CEOs and other C-suite executives in global events to:

- Share information and learn from each other on a pre-competitive basis;
- Network with their peers;
- Exchange knowledge and experiences; and
- Develop concrete solutions to industry-wide issues.

Regional events bring together the key players who are adapting and implementing global actions at the local level to share their progress and evaluate the impact.

Our Global Events

Global Summit — Dublin, 20th–23rd June 2022

The Global Summit is CGF's flagship event, uniting CEOs from some of the world's most successful retailers, manufacturers, and service providers.

This year's sold-out event was the first Global Summit since 2019 that CGF members were able to convene in person. The Summit theme, "From Resilience to Reinvention: Responsible Growth in the New Era," reflected members' readiness to move beyond reacting and adapting to world events to implementing urgent and lasting solutions in several critical areas.



It's our job as a Board to make sure that we are debating and discussing the challenges and opportunities we all face and transferring our knowledge broadly among member companies of all sizes. The Summit is an excellent opportunity to see and hear from company executives who are leading by example and motivating the industry to take action. ”

Frans Muller

President & CEO, Ahold Delhaize

Global Summit 2022



700

CEOs and C-level executives, of which **31%** were women



59

speakers, of which **35%** were women



244

companies



40

countries



I see the Summit as the pivotal moment when we are able to address and influence the entire consumer goods ecosystem. A lot of great work is being done in local countries and in the Coalitions throughout the year. The Summit is the moment where we are able to take the awareness level of all these initiatives to the next highest point throughout the industry. ”

Ramon Laguarta
Chairman and CEO, PepsiCo



We look forward to seeing you at the next Global Summit in Kyoto, Japan on 6th- 8th of June, 2023.



The CGF Global Summit is an important opportunity to bring together industry members who have a wholehearted desire to create a more sustainable world by sharing and learning from their best practices.

“In Japanese culture, having these face-to-face conversations on such important issues is valued above all else in order to achieve “wa” or “harmony”. This is why the theme of the 2023 Global Summit in Kyoto — “The Pursuit of Harmony in Turmoil: Working Together to Make a Difference” — is so relevant and meaningful. Hosting the Summit in Kyoto, which has long been the center of Japan, will make it even more significant. ”

Taro Fujie
President and CEO, Ajinomoto



GFSI Conference — Barcelona, 29–31 March 2022

Working across boundaries to ensure safe and sustainable food everywhere has never been more critical, and this year's GFSI Conference theme, "Delivering Impact for Safe Sustainable Food," affirmed GFSI's role in addressing this challenge. After two years apart, Conference delegates reconfirmed the power of cross-sector collaboration for working on solutions and catalysing collective action.

GFSI Conference 2022



+600

members of the global food safety community, of which **45%** were women



52

plenary speakers, of which **42%** were women



50

countries



85

speakers, of which **42%** women



There is no better policy in society than pursuing the health and safety of its people. This year's GFSI Conference reinforced that policy commitment with leading industry executives coming together to talk about ways to ensure that the safety of the food supply is aligned with their actions on climate change. ”

Dirk Van de Put

Chairman & CEO, Mondelez International

Join us in shaping the future of food safety at the 24th–27th April 2023 GFSI Conference in Atlanta, USA — **“Delivering Safe Food in Turbulent Times: The Need for Agility & Resilience”**.





Supply Chain Conference — Amsterdam, 24–26 October 2022

The first edition of the Supply Chain Conference gathered together over 70 delegates representing a diverse, global network with a shared mission to unlock the potential of global supply chains and be the foundation for building consumer trust.

The SCC was scheduled back-to-back with the Sustainable Retail Summit, giving delegates an opportunity to contribute to potential actions for balancing the collective need to address retailers' short-term supply chain challenges and longer-term sustainability goals.

Highlights over the three-day event included a Technical Tour, a plenary on how to navigate the VUCA supply chain in the post-pandemic era and numerous dynamic breakout sessions. The SCC participants were left feeling engaged to minimise costs, maximise efficiency and customer satisfaction, and build more sustainable supply chain operations.



Globalisation, rising costs, changing consumer demand and labour shortages — all are megatrends facing our industry today. Supply chain leaders and experts from all over the world attended the GGF's first Supply Chain Conference, and it was encouraging to see how easily we were able to come together, not only to learn from each other, but to begin working on solutions to the many challenges facing our industry and our customers.

The SCC happened at exactly the right the time to remind us how much we can achieve by working collectively to ensure that our supply chains continue to be both resilient and thriving in times ahead. ”

Ruediger Hagedorn

Director, End-to-End Value Chain,
The Consumer Goods Forum



Sustainable Retail Summit — Amsterdam, 26–28 October 2022

The Sustainable Retail Summit was held directly after the Supply Chain Conference, giving delegates the option to attend both events and learn more about concrete actions for addressing their collective challenges.

Amsterdam proved to be an inspiring setting for the SRS. The three days saw many conversations around the CGF's ambition of *"a little less conversation, a little more action."* Sessions including thought-provoking

topics on interacting with Gen Z, addressing the cost-of-living crisis impacting consumers and discussion around a hugely important element of sustainable strategies — plastics and packaging.

To end a hugely action-oriented SRS, the delegates heard how space exploration can enable us to think further in the future. For our industry, its science gave us an understanding around climate change and reminded us that seeing something from a broader angle helps us to put problems into perspective and prioritise the issues we need to tackle.



With delegates from around the world, the Sustainable Retail Summit was the perfect opportunity to open up discussions about the sustainable solutions that the entire industry needs to tackle in order to remain sustainable throughout the value chain. For me, one of the highlights was the session led by two young activists from 'Bite Back 2030.' They were also on centre stage at this year's Global Summit to share their personal experiences regarding the affordability and accessibility of healthy products.

This is the next-generation of our customers, and it's vital for us to understand what they will need and expect from us in the future. ”

Frans Muller
President & CEO, Ahold Delhaize



Future Leaders Programme — 28 January–23 June 2022

As health, economic and social challenges impact the priorities and skills of those at the helm of today's consumer goods businesses, CGF has joined forces with Boston Consulting Group (BCG) and Egon Zehnder to launch the next generation of the Future Leaders Programme.

This year's 52 participants from 21 countries were personally selected by the CEOs of CGF member companies to participate in an eight-module, six-month program of learning and collaboration. It also included an in-person module during the Global Summit and an opportunity to engage with the CEOs in attendance.



We're focused on building the next generation of leaders and supporting the development of diverse, dynamic talent. As the world gets even more complex, we need great people to continue to lead this industry.

This programme is helping them develop the leadership skills they need. Their experience with CGF will help them understand the industry with the perspectives of retailers and manufacturers. ”

James Quincey

Chairman and CEO, The Coca-Cola Company



Future Leaders (Virtual)
Programme 2022

52

participants, of which
39% were women



Our Regional Events

To drive positive change as broadly as possible, CGF members tailor the global strategies to their regions to ensure they are relevant and actionable. Regional events help to ensure that best practices are shared, that progress and impact are tracked, and members have opportunities to engage directly with key local stakeholders.



Latin Supply Chain Meeting 21 April 2022, Bogota, Colombia

- 20 participants

Latin Board Meeting 22 April 2022, Bogota, Colombia

- 40 participants

Latin Board Call 1 November 2022

- 35 participants

Foro Latino 3-6 May 2022, Sao Paulo, Brazil

- 32 participants

CEO Roundtable — “The Security and Robustness of Supply Chains” (Virtual Format) — 26 January 2022

CEO Roundtable — “Leveraging AI and Digitalisation to Optimise Supply Chains and Business” (Virtual Format) — 16 March 2022

CEO Roundtable — “Dealing with Food Inflation” (Virtual Format) — 25 May 2022

CEO Roundtable — “Managing Sustainability through the Cost-of-living Crisis” (Virtual Format) — 8 November 2022

The 4th CGF China Day (2021 postponed to 2022)

- 17&18 February 2022, Shanghai
- 396 participants (including Parallel activities)
- 69 speakers (including Parallel activities)

The 2nd CGF China Health & Sustainability Collaboration Conference (2021 postponed to 2022)

- 18 February 2022, Shanghai
- 110+ participants
- 30 speakers

The 1st CGF China Digital Supply Chain conference (2021 postponed to 2022)

- 18 February 2022, Shanghai
- 90+ participants
- 20 speakers

CGF China Board meeting — closed door (2021 postponed to 2022)

- 17 February 2022, Shanghai
- 34 participants, including observers

CGF China CEO roundtable meeting — closed door (2021 postponed to 2022)

- 17 February 2022, Shanghai
- 46 participants, including observers



“ LATAM

The Consumer Goods Forum in Latin America has gained momentum, speeding its work through the CGF Coalitions of Action. The Plastic Waste Coalition is working with multiple stakeholders in the region, including national and regional governments, recyclers, NGOs, and academia to implement the Golden Design Rules, EPR systems, among other initiatives.

Also, the Collaboration for Healthier Lives Coalition keeps leading the agenda throughout the region, involving over 24 companies, and reaching more than 10 million consumers. This year we have also launched the Race to Zero and E2E Value Chain Coalition to raise the awareness in LatAm, share case examples and establish commitments.

In addition, Forest Positive and Food Waste Coalitions are led in the global sphere with the commitment of regional companies that are allowing local implementation in countries that have a strong role to play.

After the pandemic, the LatAm Board met in person again, allowing us to keep motivating our teams and spreading our commitments. ”

Carlos Mario Giraldo, CEO, Grupo Éxito

“ China

We want to be more inclusive and attract more participants from different markets and geographies in each Coalition of Action. China has become so important, but we need more new-economy companies to share their experiences from different markets as well. This is what makes the CGF a truly global and representative organisation. ”

Daniel Zhang

Chairman & CEO, Alibaba Group CGF Board Co-Chair

“ EMEA

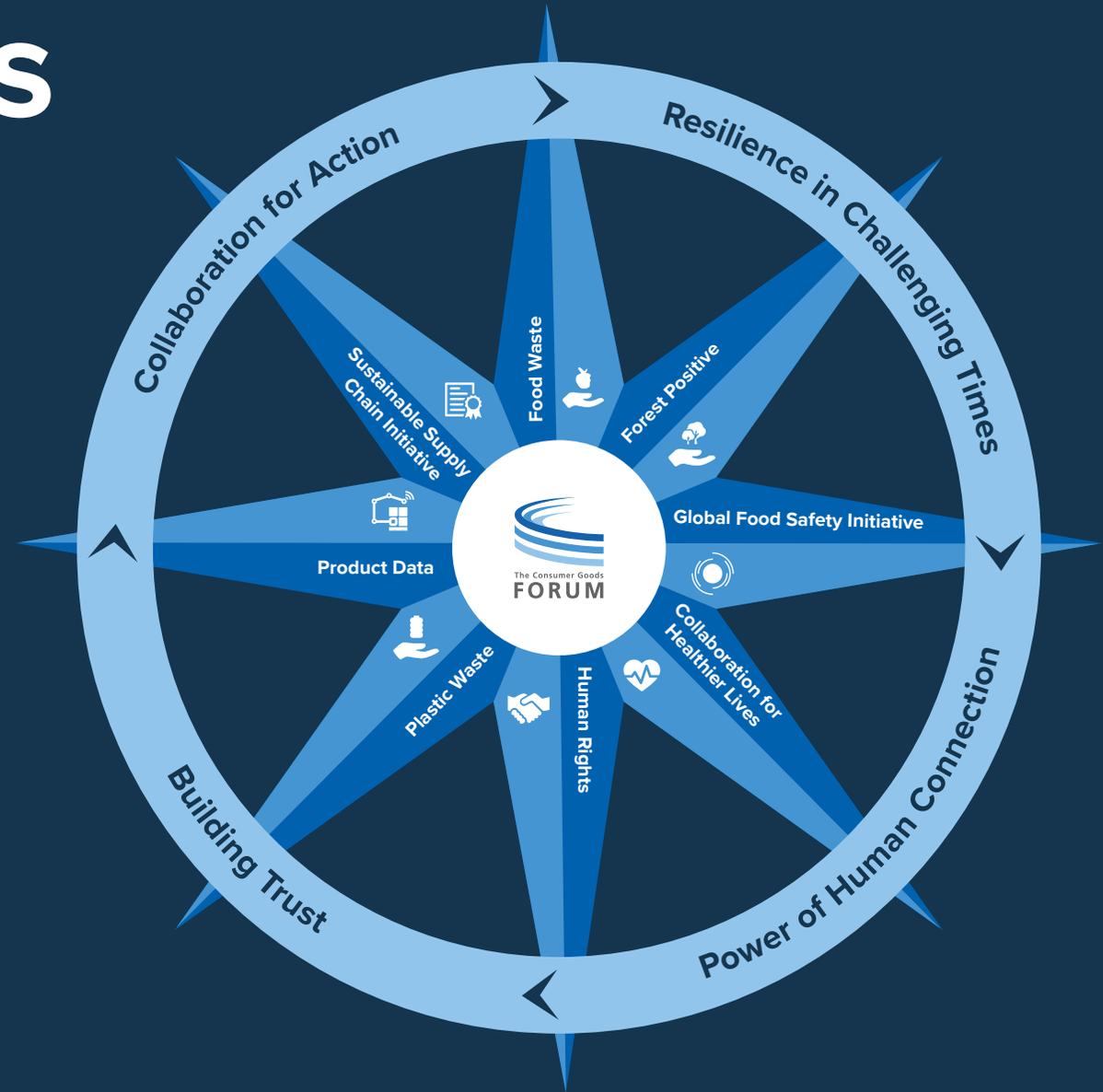
There is no question that inflation and the cost of living is putting a lot of pressure on households. One of the unintended consequences is that we're increasingly seeing changing consumer behaviour in terms of food waste in the home, which in some markets accounts for up to 70 percent of all food waste. We see this as a 'moment in time' and a window of opportunity for CGF EMEA members to really highlight food waste from both an economic and sustainability perspective across the entire region. ”

Ken Murphy

Group Chief Executive, Tesco



8 Coalitions of Action



Food Waste

A global commitment to reducing food waste.

Forest Positive

Taking collective action for a forest positive future.

Global Food Safety Initiative

Safe food for people everywhere.

Collaboration for Healthier Lives

Empowered healthier people globally.

Human Rights

Working to End Forced Labour — Working together to eradicate forced labour from consumer goods supply chains.

Plastic Waste

Playing a leading role in eliminating plastic waste on land and on sea.

Product Data

Tackling today's biggest data exchange challenges.

Sustainable Supply Chain Initiative

Building trust in sustainability standards worldwide.



Collective Influence and Impact — 8 Coalitions of Action



Food Waste

Board Co-Sponsors

Ken Murphy, Group Chief Executive, Tesco

Max Koeune, President & CEO, McCain Foods

Coalition Co-Chairs

Brittini Furrow, Vice President of Health and Sustainability, Ahold Delhaize USA

Janelle Meyers, Chief Sustainability Officer, The Kellogg Company

Coalition Director

Ignacio Gavilan, Director, Sustainability, The Consumer Goods Forum

The Global Fight Against Food Waste

As a critical social and environmental problem, food waste can only be effectively addressed through committed, collective action. The critical first steps that the Coalition took in 2021 became the building blocks of a transparent and proactive strategy to prevent and reduce global food waste and loss.

Each Coalition member has made a commitment to the Sustainable Development Goal (SDG) 12.3 target to cut food waste in half by 2030 within their own operations, and to contribute to addressing the issue of food waste beyond their own operations — up and down their supply chains.



If you think about all the things that companies are trying to deal with — improving the efficiency of our operations, reducing the carbon footprint and meeting our responsibilities to society — dealing with food waste addresses all three of these issues as well as many new imperatives ahead.

We are doing what is right in a time of escalating concerns over food insecurity in many parts of the world — a trend that is now going in reverse after a few years of progress. The case for action is very clear. ”

Max Koeune
President & CEO, McCain Foods





Value to the Industry, People and the Planet

The health, economic and geo-political events of the past year have made the reduction of food waste an even more urgent global issue. Addressing it successfully can generate a triple win by alleviating the unnecessary pressure on water, land and climate; reducing food insecurity by helping to feed more people; and saving money for businesses, farmers and households.

The Food Waste Coalition's actions in 2021 were focused on the development of a harmonised reporting template, aligned with WRAP, the World Resources Institute and the 10x20x30 initiative, to help companies evaluate their progress under one common approach.

In 2022, Coalition members' reporting using the harmonised template onto the Food Waste Atlas platform helped to demonstrate a good reporting standard and promote greater transparency to the wider CGF member companies.

The Coalition continued to be action-oriented in bringing workable solutions and practical tools such as this to the rest of the industry — to facilitate not only 'what' needs to be done, but also 'how' to do it. In the same spirit, the Coalition continued to serve as a platform for its members to share learnings and best practices for taking effective actions to reduce food waste in their own operations, as well as with their suppliers and consumers.

In another step forward, the Coalition assessed its progress towards Sustainable Development Goal (SDG) 12.3 by setting interim milestones for members' food waste reduction and the plans to aggregate their reported data to establish a Coalition baseline. A baseline report of this data will provide a yearly snapshot of the collective progress that has been made against the members' commitments to reduce

food waste, with the goal of successfully achieving a 50 percent reduction by 2030.

A Response to Supply Chain Disruption

One of the biggest issues for the industry and for consumers in 2022 was disruption in the supply chains, which had an impact on companies' operations and peoples' day-to-day lives. As a result, new priorities were added to the workloads of companies' manufacturing, supply chain and procurement teams, all of which are key departments in charge of addressing food waste concerns. Given the challenge of multiple priorities, the pace of the Coalition's activities slowed modestly this year, but the members have continued to stay the course.

The fundamentals of the Food Waste Coalition remain steadfast, with the Champions 12.3 initiative providing an overarching framework for priorities and actions. The fundamental commitment is to enable transparency on food waste in becoming an industry norm. Coalition members have continued to measure food waste against their set targets, and nearly all are set to report their progress publicly in 2022.

On upstream losses, the Coalition continued to make good progress as well, with the completion of a study on major farm-stage food loss hotspots — in tomatoes as a chosen case product — and the development of key recommendations for a food loss reduction strategy that retailers and manufacturers can incorporate with their suppliers. The results of this work will be used to inform the Coalition's wider strategy for supporting on-farm growers in decreasing food loss and increasing their savings.

A Window of Opportunity

Disruptive events in 2022 highlighted the immediate economic impact of food waste and longer-term sustainability concerns.

The most recent data shows that close to 40 percent of all food produced in the world is going to waste. This is an unwelcome increase over the previous one-third point of reference and a concerning revelation that makes food waste reduction an even more critical social, economic and environmental issue.



I believe that people haven't talked about food security enough until now. If you look at the droughts in China and the poor rice yield this year, the poor winter wheat yield, one-third of Pakistan being under water, and the crop failures in Canada and the US last year — you have to believe that we're going to see an even greater increase in food insecurity.

So we need to be thinking about the urgency of reducing food waste. After energy, the food system is the greatest destructor of the environment, either through greenhouse gas emissions or deforestation or biodiversity losses. I challenged the delegates at this year's CGF Global Summit to address this issue. And I'm hopeful that geopolitics, economics and basic survival will help to amplify why reducing food waste is so critically important to everyone. ”

Ken Murphy
Group Chief Executive, Tesco



The Road Ahead

For 2023, the Coalition's goal is to show a reduction against the original baseline, to maintain its focus on measuring food waste and, ultimately, for companies to publicly report their food waste data.

The Coalition's priorities for 2023 are divided into two core initiatives that will drive an increase in both **food waste measurement and public reporting** along with more attention to the **reduction of upstream losses** and **household food waste with consumers**.



I believe the Coalition's focus on upstream food loss is really important. Each of the members is taking responsibility to reduce food waste in their own operations. However, as much as half of the world's food is lost at or near the farm during harvesting or processing. Our companies are at the centre of the food value chain, so we are uniquely positioned to lead the global effort to reduce food loss by working together with our suppliers and growers to reduce food waste throughout the entire supply chain that comes into our facilities. ”

Janelle Meyers
Chief Sustainability Officer
The Kellogg Company



In 2023, we will know we have succeeded if more data on supply chain food waste has been measured and reported publicly, and if we have unblocked the resistance to change in procurement requirements. ”

Ignacio Gavilan
Director, Sustainability
The Consumer Goods Forum

The Power of CEO-to-CEO influence

One of the unique features of the CGF is the strength and influence of CEO-to-CEO connections. Company leaders are not only able to champion the Coalitions' initiatives in their own companies, but they can also have a strong influence on their peers in other companies to contribute to the collective objectives of:

- Encouraging more (if not all) Coalition members to measure and publicly report their food waste;
- Increasing the number of companies signing up for Champions 12.3, as a demonstration that scale is building;
- Achieving overall food waste reduction on an aggregated basis; and
- Increasing best practice sharing, thereby increasing the pool of knowledge of all Coalition members.



Forest Positive

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Christine Montenegro McGrath, SVP and Chief Impact & Sustainability Officer,
Mondelēz International

Coalition Director

Didier Bergeret, Director, Sustainability, The Consumer Goods Forum

A Global Response to Commodity-driven Deforestation

Forests cover almost 30 percent of the world's land area, but they are disappearing at an alarming rate. Stopping commodity-driven deforestation is critical to addressing global climate change, preserving biodiversity, improving livelihoods, and ensuring the reliability and sustainability of raw materials and supply chains.

The Forest Positive Coalition's vision is to drive collective action to achieve a forest positive future for people and planet by removing deforestation, forest conversion and degradation from the supply chains of four key commodities: palm oil, soy, paper, pulp and fiber-based packaging, and beef. It is underpinned by a new Theory of Change that is focused on two strategic pillars: supply chain management and production landscape engagement. The Coalition seeks to transform the limited number of businesses offering a forest positive supply of key commodities into an abundance of forest positive suppliers, as well as help transform the landscapes where commodities are produced to forest positive. Both areas of action are rooted in wide collaboration and greater transparency for accountability.

“Thank you Grant for all of your leadership. You have helped move the needle on this and I wish you well in your future endeavours. I hope that we can continue the great work you have started.”

Wai-Chan Chan
Managing Director
The Consumer Goods Forum



At COP26, world leaders promised to end deforestation by 2030. With the clock ticking towards this deadline, and the climate crisis showing no sign of slowing as we come out of COP27, it is clear we need a transformational, collective effort to achieve this aim.

Despite the dramatic economic and geopolitical issues of the day, we can't lose momentum on driving Forest Positive action. We all need to continue to step up with a sense of urgency and the Coalition members are committed to advancing our progress. ”

Grant F. Reid

Former President & CEO, Mars, Incorporated

The Path to Action

The key paths of action have been laid out over the last several years, disclosure rates against key performance indicators have been strengthened and company methodologies for reporting of each KPI have been shared. Each of these represents a critical step towards setting expectations and providing a sharper view of the Coalition members' collective performance. These are important starts, but there is still much more work to do.

In 2022, progress was made on the commitments to transform supply chains and production landscapes to forest positive. In particular, the objectives around transparency and accountability were advanced, and

the Coalition has now published Roadmaps for all four of its key commodities — palm oil, soy, paper, pulp, and fibre-based packaging, and beef — which include a set of ambitious Key Performance Indicators (KPIs) to measure action and progress. Members are following the actions in these Roadmaps to transform their own procurement policies, engage with their supply chain partners, invest in production landscapes and report publicly on their actions using an aligned set of KPIs.

The objective to create a stronger culture of transparency and accountability moved forward with an increase in members' disclosure rates for KPIs that were introduced in 2021, which was revealed in the Coalition's second Annual Report. This data included the percentage of supplies sourced from regions that are high-priority risks for deforestation, as well as the performance of upstream suppliers as it relates to the Coalition's Forest Positive Approach.

Achieving Impact Through Multi-stakeholder Engagement

A key area of action has been the engagement with supply chain partners as the Coalition seeks to transform the limited supply of forest positive commodities to an abundance of forest positive suppliers. The Coalition has been working to implement its Forest Positive Approach in members' own supply chains and in those of their upstream suppliers by individually and collectively engaging with these actors.

To aide this engagement, a key area of focus has been on building critically important relationships with traders who are essential partners in the forest positive journey. Each Commodity Roadmap includes action points and commitments for companies about how to engage with their supply chain partners, as well as publicly

reported KPIs that will help demonstrate suppliers' and traders' progress implementing the forest positive commitments. To support them in this work, the Coalition published Guidance for forest positive suppliers of palm oil (own brand manufacturers), soy, and cattle-derived products (meatpackers in Brazil), and will continue to develop this implementation guidance for other commodities in the future.

The Coalition also hosted a series of informational and capacity-building webinars for members' procurement teams around the world, and launched a deforestation monitoring and response framework on palm oil, which helps to coordinate multi-stakeholder actions to identify, remedy and prevent deforestation risks in the supply chain.

Through its Strategy for Collective Action in Production Landscapes, which was launched at COP26 in Glasgow, Coalition members are also collaborating with stakeholders on the ground in areas most impacted by commodity-driven deforestation. All Coalition members are now investing in landscape- and jurisdictional-level initiatives that are designed to drive climate, nature and people-positive outcomes while also combatting deforestation, forest conversion and degradation.

This year, the Coalition published a brief report sharing insights and case studies from these investments, demonstrating their impact in local communities and environments in key production landscapes.

Engaging with Stakeholders

The Coalition has continued to work with more than 200 stakeholder organisations from civil society, across the supply chain, production landscapes and multiple levels of government to build its strategies, evaluate performance and create the enabling environments that are necessary for forest protection, conservation and restoration.



To ensure a viable future for our industry, it must be sustainable, and our work together this year reinforced the power and necessity of collective action to drive the change needed to make this happen. We continued to strengthen our connection with all stakeholders along the value chain in two-way exchanges to listen and learn as well as to influence.

No matter how much work is done within the Forest Positive Coalition, success will only be achieved if the broader eco-system brings our Theory of Change to life.

Going forward, we will partner with others beyond our coalition to develop systemic approaches and drive greater scale. ”

Christine Montenegro McGrath

SVP and Chief Impact & Sustainability Officer,
Mondelēz International

Creating a Culture of Transparency and Transformation

Building on its commitment to transparency in 2021, the Coalition’s second annual report was launched at New York Climate Week in September 2022 to provide a progress update on the Coalition’s efforts to publicly report on an ambitious set of performance metrics.

The report illustrated the increase in disclosure rates on performance metrics that were introduced in 2021, with Coalition members now collectively reporting on 62 percent of the total deforestation metrics, and close to half reporting on at least 75 percent of the KPIs across all commodities.



The Climate Week event was important because it brought people together to exchange ideas and information and accelerate momentum. All the points of view represented at the event were important and sincere, including those that expressed a healthy dissatisfaction for the pace of change. We’re all aligned with the need to go further, faster. ”

Grant F. Reid

Former President & CEO, Mars, Incorporated

Looking Ahead to 2023 and the Power of Collective Action

The Theory of Change on forest positive is simple: it is an investment in business operations to ensure that everything is forest positive along the value chain. This includes investing in landscapes, which helps build resilience in supply chains through the protection of forests and natural ecosystems.

Having an exponential impact is more than the sum of the parts, and the power of the Coalition has helped companies that have not previously invested in landscapes to find easy ways to make sure they are allocating resources where it is most relevant for generating impact.

A transformative shift is required in how individual companies — and the industry as a whole — do business. It is not enough, for example, to purchase certified deforestation-free products from suppliers. Suppliers need to be offering only forest positive products, and that requires changes at many different levels: legislation, behaviours and companies’ procurement practices. The industry needs to build a value chain where every actor is committed to stop deforestation throughout their supply chains.



Since the launch of the coalition, we have focused on creating alignment among the membership — building a vision, roadmaps, KPIs, capacity building, landscape action and stakeholder engagement through which we have established a baseline of action. We are now focusing on rapidly accelerating our efforts individually and collaboratively to demonstrate the business case for forest positive action. ”

Bertrand Swiderski

Sustainability Director, Carrefour



Global Food Safety Initiative

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The Kroger Co.

Roy Kirby, FoodsafERM (for Mondelez International Inc.)

Coalition Director

Erica Sheward, Director, GFSI, The Consumer Goods Forum

The Main Highlights from 2022 Core Business Delivery

GFSI managed business continuity through the tail end of COVID-19 and successfully transitioned back to normal operations. GFSI presided over a third-party certification system which saw a return to in person audits; over 150,000 certificates were issued against GFSI-recognised programmes. GFSI led the way by also staging an in person conference with 600 participants.

- The conference cemented GFSI's position as the main global industry forum for promoting dialogue with regulators and NGOs with 30 regulators attending along with all the major NGOs including FAO, WFP and CODEX Alimentarius.
- The conference programme centred around the theme of “Delivering Impact for Safe Sustainable Food”, and it affirmed GFSI's commitment to sustainability in achieving the United Nations' Sustainable Development Goals: 1 (no poverty), 2 (zero hunger), 6 (clean water and sanitation), and 12 (responsible consumption and production). Given recent world events, a particular area of focus this year was the industry's responsibility to serve vulnerable communities.



Food safety capability is a pillar of our strategic priorities, and it is absolutely business-critical for us to take on the role of building capabilities that are bigger than those we have assumed thus far. Our vision has been embraced by the GFSI Steering Committee, and we believe it will be transformational.

It is clearly of interest in countries where food safety capabilities are maturing but where the pace of change needs to be stepped up, such as China, Mexico, Southern LatAm, Africa, and in some parts of the Middle East. ”

Erica Sheward

Director, GFSI, The Consumer Goods Forum



The GFSI regional outreach programme has been strengthened. All seven local groups covering all regions of the world are back up and running again after COVID-19 and each has its own work programme reflecting the diversity of needs around the world.

Making food safety a global capability is a key strategic priority for GFSI, a comprehensive review and new vision for how GFSI supports food safety capability globally was shaped and tested. A new vision for the Global Markets Programme was also proposed. GFSI designed and tested this new approach with target beneficiaries: SMEs who require capability-building support and those who are currently working with them. The goal is to better promote the Codex Alimentarius Commission standards in areas around the world and help companies remove unnecessary burdens. For those seeking to become certified, GFSI aims to increase the level of support to facilitate “once certified, accepted everywhere.”

Contributing to Thought leadership in the Area of Food Safety

2022 saw the publication of a scientific review of the big trends in food safety through the constitution of a Science and Technology Advisory Group. This review is part of a process to establish GFSI at the forefront of thought leadership on food safety, and it underscores the importance of the Coalition’s mission-critical partnerships with UN agencies such as the World Health Organisation, Food and Agriculture Organisation, Codex Alimentarius Commission and World Food Programme.



Looking back at 2022, GFSI successfully managed business continuity through the tail end of COVID and transitioned back to normal operations. Over 150,000 GFSI Certificates were issued and we returned to a physical presence conference with over 800 participants. The Conference cemented GFSI position as a global industry forum for promoting dialogue across all stakeholder groups with over 50 regulators and NGOs attending. ”

Roy Kirby

FoodsafERM (for Mondelez International)

In the Background

To maintain the trust in GFSI that has been earned over the past two decades, we have modernised our governance model and strengthened GFSI’s alignment with The Consumer Goods Forum overall.

As the CGF Coalition of Action on Food Safety, the GFSI Steering Committee, sub-committees, working groups and local groups are now operating under an updated code of conduct, ethics, and governance rules that will continue to ensure transparency to all our stakeholders and enable the delivery of our key objectives.





Collaboration for Healthier Lives

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Coalition Co-Chairs

Ayla Ziz, SVP Global Sales — Chief Customer Officer, Danone

Rebecca Marmot, Chief Sustainability Officer, Unilever

Staci Cochran, Senior Director II, Health & Wellness New Business Development, Walmart

Coalition Director

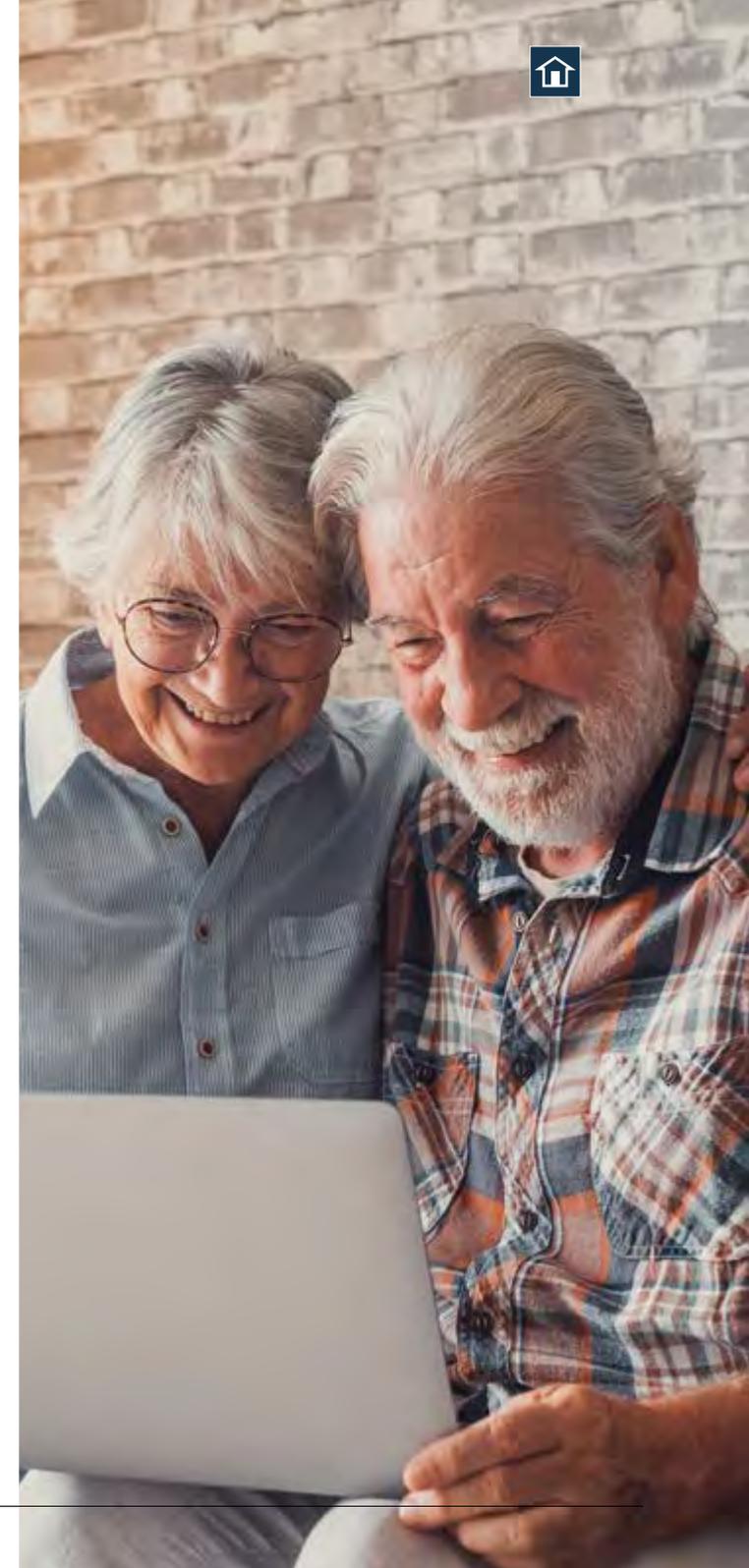
Sharon Bligh, Director, Healthier Lives, The Consumer Goods Forum

A Global Strategy Implemented Regionally

The objectives of the Collaboration for Healthier Lives (CHL) are to inspire healthier consumer behaviour in stores, online and throughout local communities; to drive collective action across sectors; and to make healthier and more sustainable choices easier for consumers.

The increasing health and wellbeing challenges often differ from region to region. As a result, CHL's global strategy relies on regional implementation to ensure that people have access to the food and hygiene and personal care products and services that are right for them. The goal is to help people make healthier decisions every day for themselves and their families in every community around the world.

To measure its progress, the Coalition has developed a robust KPI framework with set targets for consumer engagement and percentage thresholds for basket growth in food and personal care and hygiene.





Supporting the Empowerment of Healthier Consumers

The relatively recent consumer shift towards healthier and more sustainable lifestyles brought additional energy to CHL's actions in 2022. The key priorities were focused on new product development, innovation, encouraging healthier and more sustainable choices and the role of the Coalition in driving the consumer goods industry's contribution to health and wellbeing.

To encourage positive action within communities around the world, CHL members supported initiatives that could be replicated and scaled to move beyond 1:1 collaboration, with active initiatives in nine countries — USA, Mexico, Costa Rica, Colombia, UK, France, Turkey, China and Japan — with more in the pipeline heading into 2023.

A total of 70 initiatives were undertaken by Coalition members, with a KPI framework for each that examines what is working and what is not; how many people have been reached; and what tangible actions they have taken.

CHL reported notable progress in several key areas in 2022, such as the promotion of healthier and flexitarian diets with vegetarian recipes in France; improving the accessibility of healthier products in vulnerable communities in the US; and reducing the use of salt in Japan.

Collaborations with municipalities were renewed in Japan, and the first out-of-home testing took place in China. These highly successful actions on the ground are now reaching scale, and there are robust development plans for the Middle East in 2023.



There is a convergence between the work of the Coalition and how it is meeting new consumer needs, including innovations in plant-based products and alternative diets that are moving to scale in several local markets.

Local initiatives are the primary drivers behind CHL's focus on behavioural change. With the Coalition's new KPI framework, global targets and reporting mechanisms are now in place for each of these local actions. These will be important in helping us to understand the impact that the Coalition's actions are having on consumer behaviour and on the business outcomes of CGF member companies themselves. ”

Frans Muller
President & CEO, Ahold Delhaize

Responding to Dynamic Issues in Real Time

The disruptions of the past year made access to food, health, personal care and hygiene products an increasingly critical issue. In this environment, the scope of the Coalition's actions was broadened to address some of the challenging issues facing consumers and embedding sustainability in its core mission. Unfortunately, rising inflation deepened the level of consumer insecurity even further, with new concerns regarding *affordability* as well as *accessibility*.

Many consumers are facing difficult decisions: how to access healthier products without having to make important financial trade-offs. In the UK, this trade-off dilemma has been referred to as 'heat or eat', and CHL members are actively seeking ways to address this issue.



The Collaboration for Healthier Lives is the CGF's only consumer-facing Coalition of Action so we're focused on their challenges and needs. The global circumstances of the past two years have impacted consumers and so we have adapted the Coalition's priorities and programmes to optimise our offering. Improved Access and affordability are underpinning consumers' concerns and therefore reflected across our programmes in different local markets.

We also reinforced that healthier living includes good mental health which is a key part of our coalition. I also expect that many of our individual member companies will direct more of their attention to supporting healthy behaviours among their own employees and mental health will be part of this broader definition too. ”

Rebecca Marmot
Chief Sustainability Officer, Unilever



Another area of rising concern relates to inclusivity, especially for underserved and less affluent populations that have suffered more than others during the pandemic. A pilot project in Chicago, led by Walmart in the US, is focused on health equity, and it is designed to address some of these vulnerabilities in disadvantaged families in various communities.

Sharing Learnings and Best Practices

With growing consumer interest in more sustainable lifestyles, it was not surprising that CGF members across the world were eager to learn from experiences in some of the more mature markets in 2022. The success of Carrefour's in-store pilots in France, for example, engaged consumers in the "Le Lundi C'est Veggie" programme, which showed a 189 percent increase in sales as well as increased baskets amongst 70 percent of the consumers who participated in the programme.

This growing appetite to learn from their peers encouraged the CHL to conduct a year-long learning series in 2022 on relevant topics that included regenerative agriculture, transparency and environmental labelling, food waste and future foods. Some of the ideas presented in these sessions were also implemented on the ground, with France being one of the leading countries that is now developing inspiring diets that are healthier and more sustainable without compromising taste.

In partnership with Oxford University and Impact on Urban Health, the Coalition also published a new report that highlighted the results of CHL's latest supermarket trials, which were designed to make healthier products more affordable and accessible to consumers. The report reinforces the market opportunities for consumers who are seeking healthier options at an affordable price.



The most recent supermarket trials, for example, resulted in seasonal fruit sale increases of 22 percent; a 28 percent increase in plant-based milk sales, and a 29 percent increase in the sale of vegan products.

Reinforcing Employee Health and Wellbeing

The impact of COVID-19 generated greater awareness of the environments in which people live, their personal susceptibility and the importance of healthy behaviours. It encouraged companies throughout the industry to examine these issues through their own employees' lens and to increase the focus on employees' mental health and the promotion of healthier behaviour. The Coalition's Workforce Nutrition Alliance with the Global Alliance for Improved Nutrition (GAIN) continued to build traction and has over 150 HR professionals using its scorecard to track the progress of their nutrition programmes. The Alliance's goal is to impact 3 million employees by 2025.



It is important to demonstrate that promoting healthier lives also generates business. For me, the two are not disconnected, and it is so critical that everyone in the industry understands this. Taking action to nudge consumers toward healthier lives is not a CSR exercise; it is what consumers are demanding, and it is our responsibility to respond. ”

Ayla Ziz
SVP Global Sales — Chief Customer Officer
Danone



The Coalition is also working to create the 2023 Year of Employee Wellbeing with a focus on the mental health of the 10 million employees that work for CGF member companies.

Looking to the Future

Progress has been made, but limited access to healthier food and the escalating cost of living in many parts of the world will continue to be front and centre consumer concerns for the foreseeable future.

This will make the CHL's actions more relevant than ever, and have an impact on the Coalition's priorities in the coming year.



The CHL Coalition has stepped up its focus on tackling health inequalities during 2022 to respond to the cost of living crisis and growing disparities in health outcomes. The US pilot in Chicago is a great example of what CHL does best — leveraging the combined capabilities of a number of manufacturers together with a big retailer — in this case Walmart — to help improve health and wellbeing for communities in need.

Moving into 2023, we want to scale up our pilots to promote healthier habits and make healthier options more accessible for millions more people. ”

Brian McNamara
CEO, Haleon

The Coalition of Action conducted a strategy refresh for the next 3-years with clear consumer and Employee pathways on:

- Improving the accessibility of healthier & more sustainable products for consumers
- Influencing consumer behaviour to encourage and enable healthier, more sustainable habits
- Empowering our employees' health & well-being

We will work in 2023 to provoke the learnings from the CHL pilot mechanisms and share the recipe to replicate success with all CGF members.



Whilst CHL members continue to be aware of the context of the current environment, we also recognise the need for a longer-term strategy built on the pillars of transparency, responsible marketing and how we team up in the industry to bring retailers and manufacturers together to support consumers.

A renewed three-year strategy for the Collaboration for Healthier Lives has been co-developed with Coalition members, with input from external stakeholders, to make sure it is well grounded and has the strong support of the Board Co-sponsors.

The overall objective is to inspire and drive healthier consumer behaviour so that it remains their #1 priority. A global data insights project with Nielsen IQ will help to make sure that we are always quantifying our actions, and that we are using the best levers to support the most vulnerable. We will continue to work with all of the Coalition members towards greater transparency and accountability for the collective actions we take with multiple stakeholders. ”

Sharon Bligh
Director, Collaboration for Healthier Lives Coalition
The Consumer Goods Forum



Human Rights Coalition — Working to End Forced Labour

Board Sponsors

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Veronika Pountcheva, Former Global Director Corporate Responsibility and Senior Vice President, METRO AG

Coalition Director

Didier Bergeret, Director, Sustainability, The Consumer Goods Forum

A Mission to Achieve Fair and Decent Working Conditions Worldwide

Forced labour is an issue that appears with significant magnitude throughout the world's supply chains, and it includes forced child labour, forced migrant labour and human trafficking. Whilst the consumer goods industry has a number of human rights issues to address, forced labour is one of the most salient issues, and one where the industry can have the greatest impact.

The member companies of the Human Rights Coalition — Working to End Forced Labour have set out to work collectively to eradicate forced labour throughout their businesses and supply chains through enhanced due diligence combined with responsible recruitment and remuneration practices.





The Reality of Forced Labour

The pandemic has presented a conundrum regarding forced labour. Reported labour shortages that are affecting many industries have made headlines over the past two years. On the surface, that may appear to be a positive outcome for workers because of the urgency for many companies to attract and retain employees.

This is generally not the case for unskilled, entry-level jobs, however, where some companies extend their search for workers to the most vulnerable categories — to people who will accept a job under any conditions and circumstances. As a consequence, the impact of the pandemic has put many workers in vulnerable situations and even greater jeopardy.

Coalition members recognise that companies have multiple burning issues to attend to in the current environment. One of the learnings this year is the need for companies' to align their statements on responsible recruitment with the Coalition's actions on palm oil and government advocacy efforts to structure and modify recruitment markets.

Advocating for Responsible Recruitment

With these issues top of mind, the Human Rights Coalition focused on operationalising its strategic projects in 2022 by kickstarting two long-term projects to raise awareness and create resources for the responsible recruitment and employment of workers worldwide by implementing and improving human rights due diligence (HRDD).

Coalition members continued to focus their efforts in three action areas:

- Government advocacy, as a supporting mechanism, with a focus on responsible recruitment to ensure

that targets are aimed at the issues that generate cases of forced labour and bondage, and where governments themselves may not have regulations in place to protect migrant workers;

- Collaborations in making human rights due diligence a systemic norm for businesses; and
- Collaborating with Malaysian palm oil suppliers to combine efforts in addressing the systemic root causes of forced labour in a sustainable manner throughout the sector.



Whilst the impact of the year's external events elevated a number of issues such as climate change and food and economic insecurity in the public mind, this was not the case regarding forced labour. In fact, the latest statistics of the International Labour Organization show that forced labour is on the rise.

“There are more people working in forced labour today than six years ago, and this is having more impact on the consumer goods sector than we thought. Despite what people often think, this is not a poor peoples' problem. In fact, it is happening largely in high-income economies.”

Didier Bergeret

Director, Sustainability, The Consumer Goods Forum

Utilising the Power of a Collective Voice

The Coalition has been looking beyond members' own operations and supply chains to help create an enabling environment for human rights in legislative frameworks around the world. Coalition members are leveraging the power of their collective voice to influence the development of mandatory HRDD legislation and improve the policies and frameworks that are meant to incentivise responsible recruitment and discourage forced labour practices.

This year, the Coalition, in collaboration with AIM-Progress, released the “Guidance for the Payment of Worker-paid Recruitment Fees and Other Related Costs” during the CGF's Sustainable Retail Summit to offer support to businesses in navigating the issue of recruitment fees, debt bondage and remediation.

The focus of this work is reflective of the Coalition's belief that more than ever, businesses and governments must team up to ensure they are working on these issues together.

Human Rights Due Diligence Training

In early 2022, the Coalition launched a new educational and capacity-building virtual training series on the importance of deploying Human Rights Due Diligence (HRDD) systems in HRC members' own operations.

HRDD is a process that organisations can carry out to identify, prevent, mitigate and account for how they address actual and potential adverse human rights impacts in their own operations, their supply chains and other business relationships.

These training sessions are designed for procurement, management, operational and



human resource professionals working in member companies' operations. They are a crucial element of the Coalition's first project, which focuses on helping all Coalition members achieve 100 percent forced labour-focused HRDD coverage of their priority own operations by 2025.

Driving People Positive Transformation in Malaysia

The Coalition launched its **People Positive Palm Project** this year to drive collaboration between consumer goods companies and palm oil suppliers in Malaysia to address the issue of forced labour in the Malaysian palm oil sector. The project was launched during a series of meetings and workshops in Kuala Lumpur, where Coalition members, 13 participating Malaysian palm oil suppliers and other stakeholders met to kickstart the initiative.

The primary objective of the People Positive Project is to address the root causes of forced labour in a sustainable and structural manner. The intent is to help suppliers develop the management systems they need to ensure they have undertaken substantial efforts to address forced labour. As a result, the project offers two complementary tracks focused on learning and engagement in which all palm oil suppliers operating in Malaysia are invited to participate based on their individual needs.

Both areas of engagement will contribute towards collective advocacy in addressing forced labour in the sector — particularly within the Bangladesh, Indonesia and India migration corridors — and to support further learning to scale in other geographies and categories represented by the Coalition members.

2023 Priorities

Looking ahead, the Coalition will enter the first phase of engagement with Malaysian palm oil suppliers as part of the People Positive Palm Project. By leveraging the efforts of all actors, the members look forward to working together more closely with Malaysian stakeholders to address the systemic causes of forced labour.

The Coalition will also focus on accelerating its actions in the coming year around the implementation and improvement of HRDD systems in members' own operations to help their companies reach a 'Leadership' level of HRDD coverage, particularly in their high-priority operations.

There will continue to be opportunities to leverage additional areas of action by collaborating with other Coalitions, as well, most notably with the Forest Positive Coalition to ensure its strategy is both deforestation- and forced labour-free, and with the Sustainable Supply Chain Initiative to build trust in sustainability standards worldwide.





Plastic Waste

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Barry Parkin, Chief Procurement and Sustainability Officer, Mars, Incorporated

Rob Nicol, Vice President, Corporate Affairs, Walmart Canada

Coalition Director

Ignacio Gavilan, Director, Sustainability, The Consumer Goods Forum

Progressing Towards a Circular Economy

Moving from a linear to low-waste circular economy requires a different approach to the use of plastic — from production, consumption and reuse, to recycling and disposal. With a common vision of a world where no plastic waste ends up in nature, the members of the Plastic Waste Coalition have the collective ambition to eliminate the unnecessary use of plastic packaging, improve recyclability and support effective systems worldwide.

The Coalition strategy is guided by the vision of the Ellen MacArthur Foundation for a New Plastics Economy, which the CGF endorsed in October 2018.





Maintaining a Focus on Three Core Objectives

Members of the Plastic Waste Coalition made excellent progress in advancing their collective agenda in 2022, based on a comprehensive plan to tackle three pressing objectives:

1. The implementation of **Nine Golden Design Rules** as a practical guide for redesigning packaging and increasing recycling efficiency.
2. Developing guiding principles for the ecomodulation of **Extended Producer Responsibility (EPR)** fees.
3. Establishing the vision and principles for credible, safe and environmentally sound development of the chemical recycling industry.

Implementing the Nine Golden Design Rules

This set of voluntary, independent and time-bound packaging design commitments is creating significant value for the industry and the wider system. It is also building the necessary momentum for achieving the further design changes that will be required to achieve the targets laid out in the New Plastics Economy Global Commitment.



The Plastic Waste Coalition has made encouraging progress this year, with an impressive 97 percent of companies integrating the golden design rules into their decision-making. There is still more work to be done upstream however, with 25 percent of companies yet to communicate the design rules to their suppliers. ”

Alan Jope
CEO, Unilever

Gaining Traction for EPR

Coalition members released a paper entitled “Guiding Principles for the Ecomodulation of EPR Fees”, which is an addendum to the paper “Building a Circular Economy for Packaging: View from the Consumer Goods Industry on Optimal Extended Producer Responsibility”, which was first published by the Coalition in August 2020.

EPR schemes have been in use across Europe for some time, and they are now beginning to gain traction in the US. The final proposal that was adopted by the State of Colorado this year was very similar to the CGF framework — a very encouraging sign of the Coalition’s progress.

Several Coalition members representing 20 of the leading companies in the US have now formed a regional EPR working group. They are leveraging the common vision for optimal EPR frameworks that was published by the Coalition, and will present it to their state legislators.

New Jersey is currently developing legislation, with Washington State, Idaho, Maryland, and New Hampshire legislators beginning to instruct companies in their States to operate according to these principles, and the American Beverage Association has already adopted the CGF EPR scheme.



Just five years ago, EPR programmes were not open for discussion in the US. Now, there is an open dialogue among companies. They are not resisting it. In fact, they are actively promoting it and want to advocate for the right EPR programmes in their States. CGF’s role has been to convene the members, and each has made a decision about the position they are going to take forward for consideration by their respective legislators. ”

Ignacio Gavilan,
Director, Sustainability
The Consumer Goods Forum



A New UN Plastics Treaty on the Horizon

The UN Plastics Treaty is expected to be another major step forward in addressing the reduction of plastic waste throughout the world. The objective of the treaty is to develop an international legally binding instrument on plastic pollution, and the Coalition members believe that this treaty can help to level the playing field. Perhaps, most importantly, it provides an opportunity for the Coalition to contribute to the details of the treaty with well-developed, practical positions. A new Coalition workstream will be formed in 2023 to focus specifically on engagement with the treaty.

As an initial step, Ignacio Gavilan, Plastic Waste Coalition Director, and three Coalition members attended the first UN Intergovernmental Negotiating Committee meeting in November 2022, to present the Coalition's work on packaging redesign and EPR, and to reinforce their value as the implemented research and recommendations were based on extensive stakeholder consultations, including NGOs such as the Ellen MacArthur Foundation.

The treaty is likely to spark regional and local initiatives in select countries, and potential advocacy efforts of CGF member companies are expected to be constructive in their countries given the opportunity for these major industry leaders to approach their governments with a helping hand.

With the foundational work that the Coalition has already completed on EPR, it is hoped that a lengthy process of consultation will not be required.



This is an issue that's at the top of the global conscience when it comes to affecting systems change, and it is an opportunity for the Coalition to influence and support the UN's mission. From our perspective, we will work with the UN as effectively as a possible and encourage them to adopt the core drivers of change that the Coalition has already identified.

This would put additional weight behind our efforts, and ideally lead to more people working together on the same high-leverage opportunities. ”

Galen Weston
President and Chairman
Loblaw Companies Limited

Looking Ahead to 2023

The Coalition's **chemical recycling workstream** completed the vision and principles for credible, safe and environmentally sound development of the chemical recycling industry this year. An independent Life Cycle Assessment study was published. It demonstrates that system-level emissions would be approximately 40 percent lower in certain geographies and circumstances where at-scale chemical recycling was available to process hard-to-process plastic rather than sending this material to waste-energy incinerators.

Now that the vision and principles for chemical recycling have been established and publicly announced, the

advocacy for the safe development of this technology is being transferred outside the Coalition's scope in 2023 to members' individual strategies.

The Coalition members are, therefore, focused on 'keeping it simple' in 2023 in two primary areas where members can take tangible actions and make real progress:

1. Mobilising for optimal EPR in priority regions as seen by the successful experience in Canada and Colorado State in the US; and
2. Making real progress on implementation of the Golden Design Rules with full transparency and measurement disclosure around that progress.



I believe that there is one thing that every Coalition member can do right now. And that is, to advance their own commitment to the Golden Design Rules — to effectively measure where they stand today and how they plan to mobilise effectively.

The solutions are coming quickly. It may still feel like an uphill climb to some, but this is no longer a straight-up vertical ascent. The passage is markedly easier, and it's time for more people to realise the benefits. The cost of all this change will be lower for everyone as more companies come on board. ”

Galen Weston
President and Chairman
Loblaw Companies Limited



Product Data

Board Co-Sponsors

Daniel Zhang, Chairman & CEO, Alibaba Group

Jon Moeller, President & CEO, Procter & Gamble

Coalition Co-Chairs

Kristian Gatewood, Senior Vice President, Global Sales Strategy & Innovation, Procter & Gamble

Tom Rose, Head of International Operations, SPAR International

Coalition Director

Ruediger Hagedorn, Director, End-to-End Value Chain, The Consumer Goods Forum

The Building Blocks of Consumer Confidence

Trust is one of the building blocks of consumer confidence: trust that manufacturers and retailers are not only providing safe and dependable products, but also supplying the right information that helps consumers make well-informed choices.

However, the 'right information' is only as good as the data behind it — data that is accurate, consistent, and easily exchanged from the manufacturer to the retailer and ultimately to the end consumer.

The Coalition aims to ensure that all products have unique product identifiers that can be verified in real time, and that all brand owners, retailers and platforms follow the same foundational Global Data Model. What inspires the Coalition members is an understanding that accurate and reliable data exchange is going to elevate consumer experiences and build trust and confidence in the entire industry.



Our Product Data Coalition has set an ambitious goal to transform how we exchange product data between trading partners to be more complete, accurate and efficient. We have made progress and are committed to accelerating our impact in the year ahead to further build trust, loyalty, and create value for consumers and all stakeholders alike. ”

Jon Moeller
President & CEO, Procter & Gamble





In the past year, the Coalition's focus was on accelerating the adoption of its existing initiatives, such as the Data Leapfrog pilot projects, which address improvements in the exchange of product data between trading partners, manufacturers and retailers. To ensure the data is complete and accurate, the initiatives that enable that exchange — such as Verified by GS1, the Global Data Model and GTIN ubiquity — were priorities for action in 2022.

Tangible progress was made in three key areas:

Verified by GS1: The capability for brand owners to upload seven defining product attributes to a central registry to ensure that a product can be authenticated by trading partners has grown quickly, and it is now available in 80 countries. As well, the potential to retrieve product information and verify a product's identity is live in almost 54 markets.

Global Data Model: A consistent set of product attributes for addressing data quality issues and inefficiencies in the data exchange between trading partners is now in place in 16 countries — and in active use in nine of these. Larger volumes of data are now being uploaded. However, there are concerns regarding poor data quality, which will be a priority area to address in 2023.

Coalition members understand the value that can be driven from complete and accurate data, and they have recognised the urgency to address product data challenges in areas such as supply chains where incorrect supply chain data can create negative downstream problems that lead to ordering issues, under-utilisation of trucks and higher out-of-stock situations.

Two-Dimensional Barcodes: Raising awareness of the ambition to migrate towards a single code on pack by 2027 has been accelerated, with the development of several educational materials, including an interactive tool to explore the benefits and types of 2D barcodes, a “getting started” guide and several case studies.

Despite the progress in these three areas, the pace slowed modestly in the engagement of Coalition members in 2022, primarily as a result of new priorities and pressures that are facing CEOs and their companies as they deal with the here and now of world events. Some companies have also been more cautious about their investment new initiatives, given that the hurdle rate on investments and the period of return has tightened.



The Coalition's progress this year reflects my view that we need to start small and be focused — whether that is one country, one region or one continent — and bring together the business partners to do something together. That way, we can apply real-use cases to prove the value of our actions. And that is what will encourage more people to join, to support tangible commitments and make real efforts in taking action. ”

Daniel Zhang
Chairman & CEO, Alibaba Group

Levels of Engagement

One of the goals this year was to encourage widespread adoption of the Coalition's initiatives. Whilst implementation has not yet reached scale, there were definite signs of progress. The Verified by GS1 Registry, for example, is moving towards mass adoption with 300 million GTINs having been uploaded to the database. The next step will be to define the universe of existing GTINs, determine the scope of full-scale implementation and continue to drive adoption to create a critical mass of people who are utilising the database in a way that transforms the delivery of accurate product data.





There are different levels of engagement, and some companies are getting ready for the next steps. This is very much as a journey of discovery and implementation as opposed to having everyone on board with everything from day one.

One of the challenges, however, is that when the value is not fully understood, companies often wait for a solution to be found, which leads to fragmentation in the industry. By being directly involved, companies can make sure the answers that are developed actually meet the needs of their businesses and the industry as a whole.

The reality is that companies can either connect and collaborate — learning from each other, gaining experience, and supporting the implementation — or not be engaged, and then be in a position of having to catch up. It is better to be on the inside and contributing to the conversation rather than listening from the outside. ”

Tom Rose
Head of International Operations
SPAR International

Key Learnings for the Road Ahead

Many new opportunities are arising and enlarging the tent for Coalition members. With the increase in consumers' appetite for nutritional data, for example, the Product Data Coalition is beginning to work together with the Collaboration for Healthier Lives on a pilot project in China. This inter-connectivity and cross-Coalition collaboration is opening up discussions about the potential for further opportunities for Coalition members to connect with other CGF Coalition pillars where the issues and goals are closely intertwined.



In looking back at 2022, even with all the uncertainty in the world and its impact on the industry, data continued to be foundational. Consumers need complete, accurate and efficient product information. They want ingredient transparency and product provenance, and to understand the sustainability of products. This goes well beyond the standard information about a purchase, and consumers are demanding it. ”

Kristian Gatewood
Senior Vice President
Global Sales Strategy & Innovation
Procter & Gamble

In looking at the Coalition's numbers for 2022, it appears that everything has moved forward relatively well. The Coalition has progressed, but customer expectations are growing faster than anticipated. There is a growing understanding of what the consumer is beginning to demand and what is possible, which is creating new goals and stretching the distance to the finish line.



This past year has shone a spotlight on the issues that we are trying to fix as well as new opportunities that are arising. In the coming year, addressing the recurring issues related to poor data quality will continue to be a priority.

But there will also be an emphasis on achieving greater engagement in the implementation of the Coalition's initiatives, especially among companies and CEOs outside the Coalition who are advocates for the advances in product data that have made a difference in their businesses. This will be necessary to reach the critical tipping point that is needed for mass adoption. Overall, we believe we need to stay the course, but improve the way we articulate the value of product data and its benefit to all our stakeholders. ”

Ruediger Hagedorn
Director, End-to-End Value Chain
The Consumer Goods Forum



Sustainable Supply Chain Initiative

Board Co-Sponsors

Richard Smucker, Executive Chairman, The J.M. Smucker Company

Simon Roberts, CEO, Sainsbury's

Coalition Co-Chairs

Hugo Byrnes, Former Vice President of Product Integrity, Ahold Delhaize

Vineet Khanna, Vice President of Supply Chain, Nestlé

Coalition Director

Didier Bergeret, Director, Sustainability, The Consumer Goods Forum

Raising the Industry's Social Compliance Levels

The Sustainable Supply Chain Initiative (SSCI) provides clear guidance to buyers and suppliers in the consumer goods industry on third-party auditing, monitoring and certification schemes that cover key sustainability requirements and apply relevant governance and verification.

Supply chain audits have historically been the primary solutions that companies have used to monitor their supply chain. However, this is not enough in today's complex world, and the Coalition's goal is to make sure that all the standards are well designed and have adequate management systems to support them. Moreover, with hundreds of schemes on the market, and new ones emerging each year, it can be difficult for organisations to know which schemes to trust.

The initiative currently focuses on benchmarking social compliance programmes under three sectoral scopes: Manufacturing and Processing, Primary Production and At-Sea Operations. The SSCI has now launched the development of its Environmental Benchmark and will aim to deliver a final set of criteria by 2024.





SSCI Recognition

In 2022, the Sustainable Supply Chain Initiative continued to progress on its ambition to build trust in sustainability standards worldwide. The primary focus was on benchmarking third-party sustainability certification and audit schemes to recognise standards that cover key sustainability issues and operate in a trustworthy and credible manner.

As of November 2022, four schemes were undergoing benchmarking, and BRCGS and the Responsible Fishing Vessel Standard were the first two standards to successfully complete the benchmarking process and achieve SSCI Recognition.

There was very good progress in beginning to build a critical mass of SSCI-recognised schemes. As the CGF Board of Directors stated in May 2022, this is an essential tool that businesses need in order to ensure that they can trust the independent schemes and programmes that verify their supply chain sustainability. The Board's message was a powerful one, and with the CEOs of the world's largest consumer goods companies calling for greater involvement in the SSCI, the Board used its voice to emphasise the importance and impact of aligning and building trust in sustainability standards.

Importantly, with the 2030 deadline for reaching the Sustainable Development Goals approaching, the Board also stressed the critical need for businesses to act with urgency to ensure the sustainability of their operations and supply chains.



2022 was a pivotal year for the Sustainable Supply Chain Initiative. The endorsement by our members' CEOs at the beginning of the year gave us a welcome impulse. It highlighted our ambition to benefit the wider industry by ensuring that third-party schemes meet evolving global supply chain due diligence requirements, and how this goal was now becoming a reality with the SSCI.

We have had a surge of benchmarking applications from sustainability schemes and additional sign-ups to the Coalition, bringing the membership to 24 committed industry leaders. With significant progress on the development of environmental criteria to complement our existing social requirements, I am confident that SSCI will continue to drive a significant positive impact on the sustainability of global supply chains. ”

Vineet Khanna

Vice President of Supply Chain, Nestlé





SSCI Benchmarks

To be recognised by the CGF's Sustainable Supply Chain Initiative, social compliance schemes (and environmental schemes in the future) are required to undergo benchmarking according to the SSCI benchmark methodology and provide evidence that all SSCI Social and Scheme Management Benchmark Criteria are met. The SSCI currently benchmarks schemes covering activities in the Manufacturing and Processing, Primary Production and At-Sea Operations sectors.

The CGF as a Convening Platform

One of the strengths of the CGF is its ability to be a convening platform to make connections across sectors, borders and issues that cut across different stakeholder groups and the actions of other CGF Coalitions. This truly allows for our industry to be part of the global responsible sourcing conversation.

For example, the SSCI is now collaborating on social sustainability issues with the Human Rights Coalition — Working to End Forced Labour to understand what key sustainability issues organisations should cover in their human rights due diligence and certification schemes should cover in audits.

In 2022, the Coalition opened up exploratory work to create a set of environmental benchmark criteria so that the SSCI may be able to recognise environmental sustainability standards in the future. This is an exciting area of progress that will be supported by ongoing collaborations with the CGF's other sustainability-focused initiatives, including the Forest Positive Coalition and the Coalition of Action on Plastic Waste.

Coupled with the Board's statement about the need for increased benchmarking, the interconnectedness of several CGF Coalitions reflects the maturity of the consumer goods industry, and the opportunity

to apply the same practices that apply to supply chain sustainability to issues such as social and environmental compliance. It also reflects the industry's support for being a mature actor when it comes to the complexity of supply chain due diligence discussions.



Not only do we have tools, but we want to make sure they are at the right level to anticipate the regulations that may be expected, and to provide an additional layer of trust in the way we do things.

This is not to say that one approach is better than another, but with the vast array of tools that are available, the industry can equip itself with a mechanism to ensure it uses those that it can trust. Let's do the right thing, and also make sure that we are doing it right. ”

Didier Bergeret
Director, Sustainability
The Consumer Goods Forum

Looking Ahead to 2023

Increasing the uptake of the SSCI benchmark by more standards, and the further adoption of SSCI as a selection criterion by Coalition members, will be markers of success in 2023. To support this progress, the Coalition will focus on developing clear communications around the benefits to scheme owners and companies, and continue to simplify and align the benchmarks themselves.

Continuing to support other CGF Coalitions with tailored environmental benchmarks will also help to embed simple, sustainable choices in more areas of the CGF's work, and provide members with greater clarity and speed in making their sourcing decisions.



The rapidly changing climate and rising cost-of-living is presenting many companies with a range of unprecedented operational challenges. However, it is these challenges that highlight the importance of SSCI in aligning and simplifying sustainability standards to help make the sustainable choice a simple choice. Ensuring sustainability throughout our supply chains is simply the right thing to do.

The changing climate and rising cost-of-living deeply impacts those people that businesses across the consumer goods industry depend upon — including farmers, growers, and factory workers. We must view our supply chains as an extension of our organisations, and sustainability as the foundation for resilience. In that context the coming year presents SSCI with the biggest opportunity to prove the value of sustainable supply chains to businesses that may be faced with increasing shocks to their systems. ”

Simon Roberts
CEO, Sainsbury's



Accelerating the Power of Collaboration

From a global pandemic to the geopolitical shocks exposing the fragility of the global food system, the events of the past two years have been a testament to the agility of businesses and other organisations to act quickly and deliver rapid solutions. Nowhere is this more evident than in the work of The Consumer Goods Forum, which has brought together consumer goods manufacturers and retailers to work in solidarity.

Through their perseverance and commitment to the common good, CGF members are actively driving positive change across the industry. And in doing so, they are helping to create a more sustainable future for people and the planet.

The pandemic drew the world's attention to the need for collaboration and the power of collective action. The CGF had already embraced those principles, and the 8 Coalitions of Action demonstrate the impact that can be achieved when people and organisations come together and focus on a common goal.

Throughout this year's annual review, you will find tangible evidence of the bold actions that each of the

Coalitions is taking towards a more sustainable future, and KPMG is pleased to have been able to play a part in bringing their progress to light again this year.

No one has all the answers to address all of the economic, social and geopolitical issues that the world is currently facing, which is why cross-industry cooperation will unlock impactful approaches the fastest. Our belief at KPMG is that professional services providers can make an active contribution by providing an independent external perspective in the ongoing conversations amongst Coalition members. And by connecting the dots from their experience in sectors outside the consumer goods industry, KPMG professionals can help add further value by sharing leading practices and innovations that are relevant to the Coalitions' projects.

KPMG is proud and committed to its role in achieving that impact, and to contribute to accelerate the collective action of consumer goods manufacturers and retailers in achieving a sustainable future.

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About The Consumer Goods Forum

The Consumer Goods Forum (CGF) is the only CEO-led organisation that represents both manufacturers and retailers globally. It brings together senior leaders from more than 400 retailers, manufacturers and other stakeholders across 70 countries. The CGF accelerates change through eight Coalitions of Action: forests, human rights, plastics, healthier lives, food waste, food safety, supply chains and product data. Its member companies have combined sales of EUR4.6 trillion and directly employ nearly 10 million people, with a further 90 million related jobs estimated along the value chain. It is governed by its Board of Directors, which comprises more than 55 manufacturer and retailer CEOs.



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