



OPTIMISE

The Club

Data&Insight
SERVICES

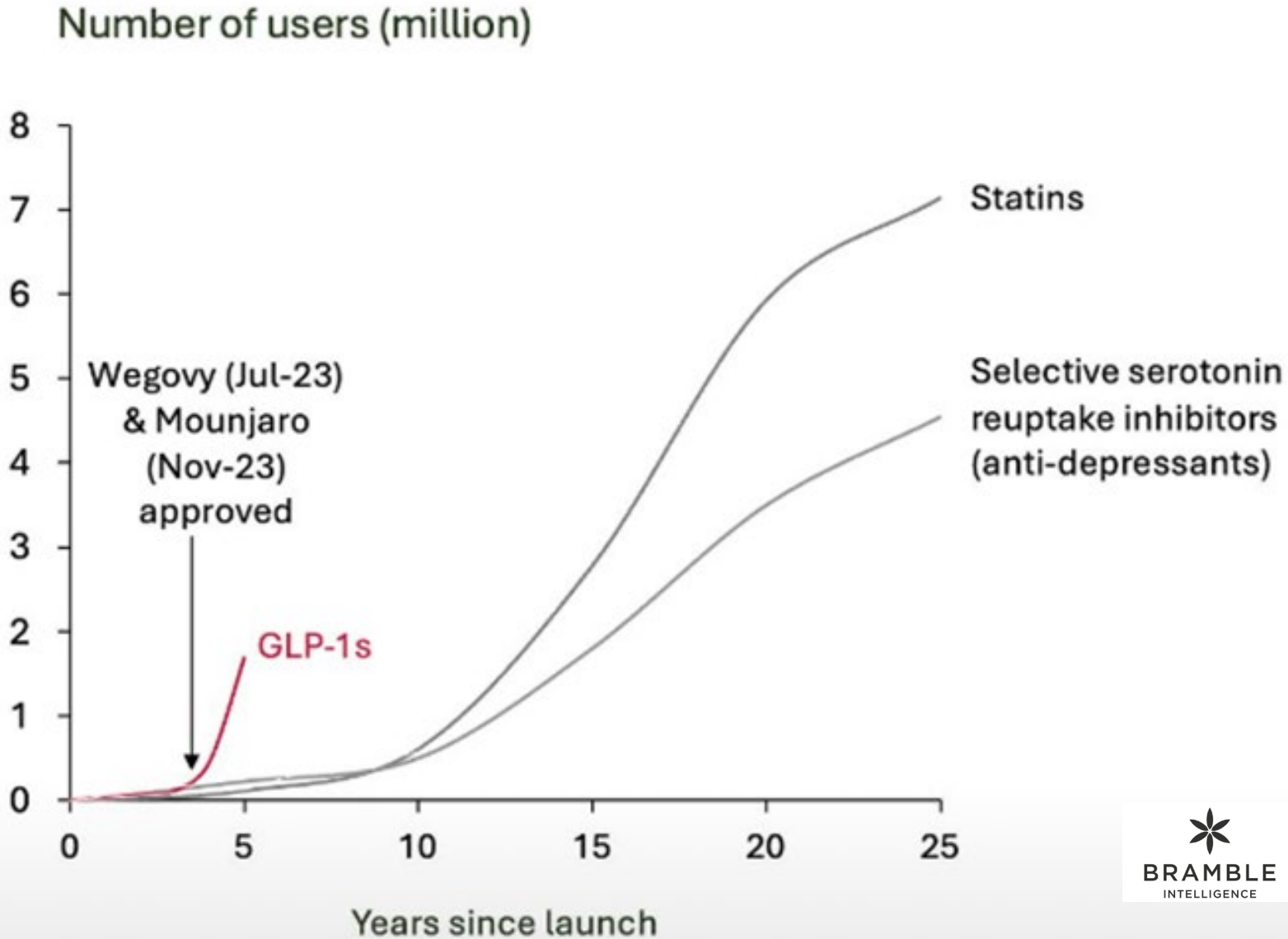
David Read

PRESTIGE

Optimising Hospitality Procurement



HUNGER



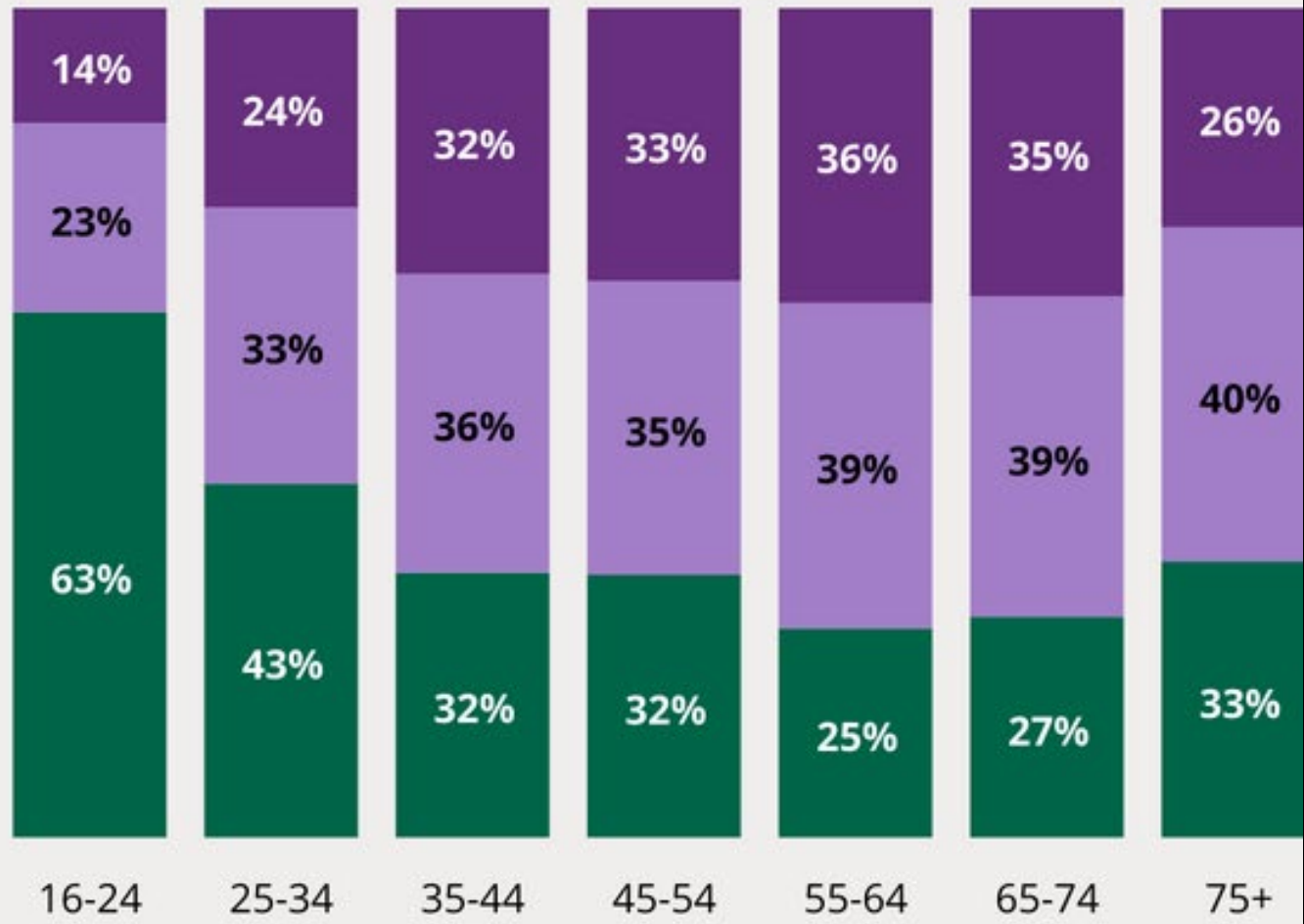
**Weight-loss drugs
in the UK have
experienced a very
fast start
compared to
STATINS and ANTI-
DEPRESSANTS**





Two thirds of those aged 35 and over were overweight or obese in England in 2022

- Obese
- Overweight
- Not overweight or obese



Data: NHS Digital
Chart: House of Commons Library

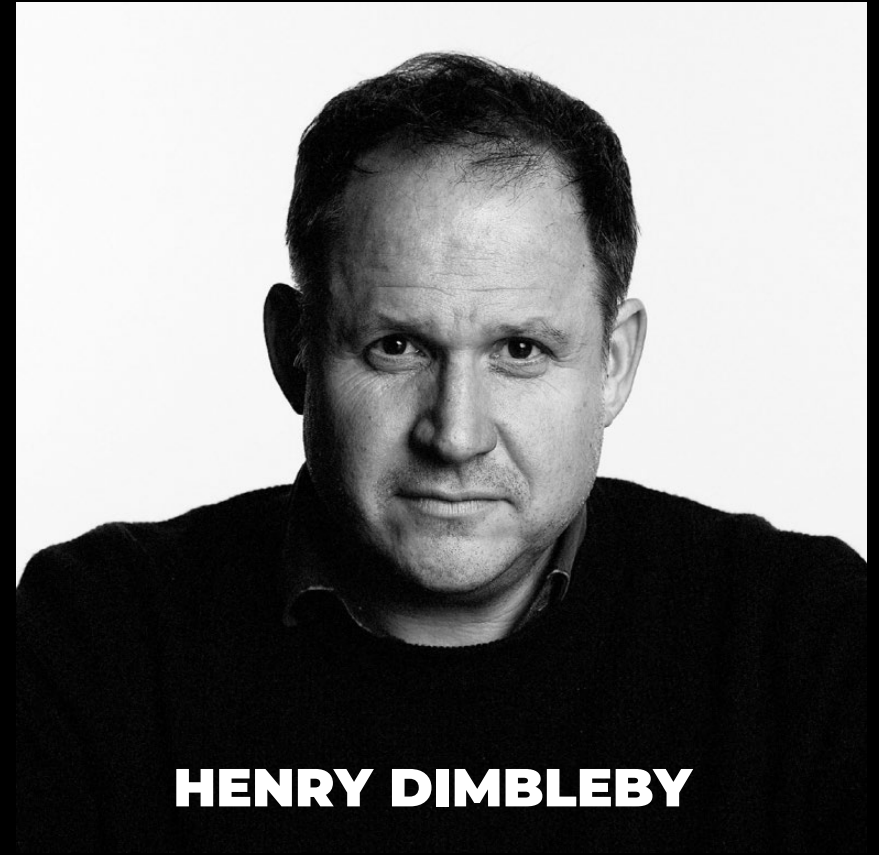
ESTIMATING THE FULL COSTS OF OBESITY

A report for Novo Nordisk

26 JANUARY 2022



“If governments won’t intervene to improve our food system, pharmaceuticals may be our best option. It seems to me that we face a choice between two types of intervention: public or private. We can try to improve our food environment for everyone, through legislation and financial incentives. Or we can leave it to individuals to hack their own biology, with the help of modern medicine.”



HENRY DIMBLEBY

**Author of National Food
Strategy and “Ravenous”
Founder of Leon Restaurants
and Bramble Partners**

“That’s what has struck me about these drugs becoming readily available and then, almost instantly, widely used: how casual it all is”

“The next day at lunch I bite into a char siu bagel and suddenly it feels different in my mouth: like functional food, fuel. At the cinema I eat a hotdog and it tastes like texture. I still make food purchases based on my old appetite – a bag of those good supermarket cookies stays on the kitchen counter for days, and when has that ever happened? – and I sit in front of a basket of chicken tenders and just look at them, for minutes, before bothering to eat.”

“The complete absence of appetite is what’s so strange, though: after a couple of days it just evaporates, walks out of the room, and now it just isn’t there any more. I keep losing track of my mood in the middle of the afternoon. I keep becoming hangry without the “h”, because I haven’t noticed my own hunger. I have to learn to eat with my brain, instead of my body; to force myself to start my day with a bowl of porridge and a banana, so I have enough fuel to think beyond coffee.”



JOEL GOLBY

Guardian Journalist

Smaller portions



UP

Cravings for fat/sugar



DOWN

Meal frequency



DOWN

Alcohol tolerance



DOWN

Nutrient density



UP

Supplements



UP

1.7m users now (2.5%) – as many as 13m users (19%) by early 2030s

GLP-1 USERS ARE...

Doing more

- **Healthy options**
- **Nutrient dense options**
- **Proteins, Fruit Vegetables**
- **Sharing others food**
- **Selecting fewer courses**
- **LESS visits & LESS Food/Alcohol**

Doing less

- **Snacks**
- **Alcohol**
- **Carbonated Soft Drinks**
- **High Carb foods**
- **Sugar/Fat treats**
- **All you can eat/pile it high**

**Restaurant choice influenced by recognition of different needs
LESS single diners, MORE starters and sharing plates, LESS sugary desserts**

THE DEATH OF INDULGENCE??

**As much as 1 in
5 of the
population may
be on GLP-1 by
early 2030's**

Swimming with the GLP-1 wave

MENU



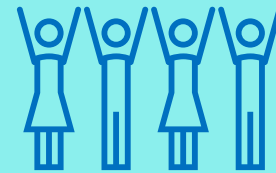
Flexible portions
Balanced content
Ingredient emphasis

BEVERAGE



Low-No drinks
Smaller alcohol pours

EXPERIENCE



Experience emphasis
Sociability focus
Experience not volume

OPERATIONS



No stigma
Inclusivity
Third place focus



SIGNIFICANT WAVES OF CHANGE

HEALTH



Weight Loss Drugs

UPF

SIGNIFICANT WAVES OF CHANGE

HEALTH



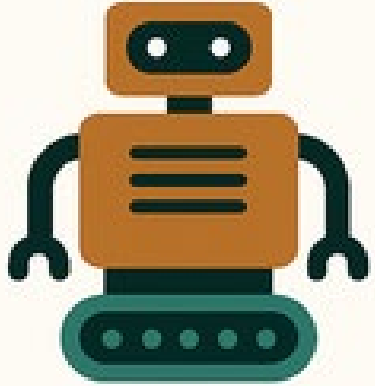
Weight Loss Drugs
UPF Foods

AI



Gut science
Farming techniques

TECHNOLOGY IN FARMING



AI ROBOTICS



SOIL & WEATHER
DATA



DRONE USE FOR
DISEASE CONTROL



SOIL EMISSIONS
& BIODIVERSITY

UK Farming is starting to use AI/Robotics

Data driven innovation is now proven to impact yield, and enable environmental improvements

Robotics enabling efficiency in planting and picking

Enhanced disease management

SIGNIFICANT WAVES OF CHANGE

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Good Food Cycle
Food strategy

DEFRA'S GOOD FOOD CYCLE



BALANCE
DIETS



TACKLE FOOD
WASTE



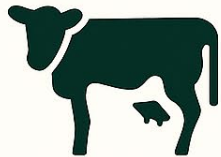
HEALTHY
SOILS



EMPLOYER
BETTER



STABLE (=)
PRICES



GOOD ANIMAL
WELFARE



REDUCE
EMISSIONS



PROTECT
BIODIVERSITY

PLUS +

Accessible for all

Security of UK supply

Vibrant Food cultures

Cooking skills for all

Better trade policy

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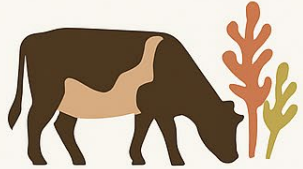
Good Food Cycle
Food strategy

CLIMATE



Supply Risks/Costs
Net Zero

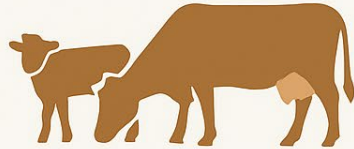
UK FARMING REDUCING ITS CARBON FOOTPRINT



Feed

Improving feed & nutrition

Feed additives, high-quality forage, reducing soya imports



Breeding

Breeding & genetics

Selective breeding, beef from dairy herds



Manure

Manure & slurry management

Anaerobic digestion, covered slurry stores, precision application



Land

Land & grassland management

Rotational grazing, multi-species swards, agro-forestry



Technology

Carbon audits, smbg

Carbon audits, smart collars



Policy

Sustainable Farming Incentives

Sustainable Farming Incentive, retailer and processor-led schemes

UK Farming is going for Net Zero by 2040

Farming businesses with scale are leading the way with changes to practices and the use of technology

Zero Carbon animal protein is definitely doable – excluding impacts of historic deforestation

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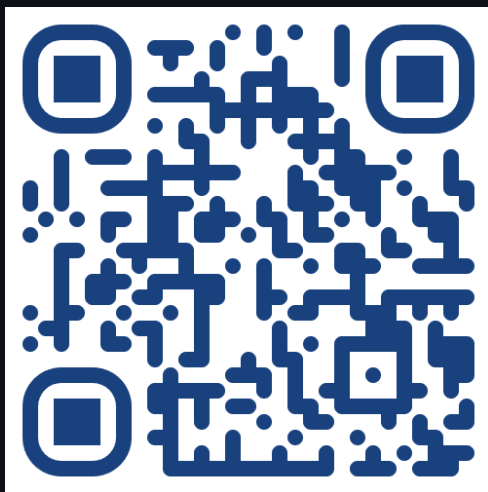


Supply Risks/Costs
Net Zero

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PRESTIGE-PURCHASING.COM

David Read

PRESTIGE

Optimising Hospitality Procurement

The Good Food Cycle's ten stated outcomes are:

HEALTHIER AND MORE AFFORDABLE FOOD

**An improved food environment that supports healthier and more environmentally sustainable food sales;
Access for all to safe, affordable, healthy, convenient and appealing food options.**

GOOD GROWTH

**Conditions for the food sector to thrive and grow sustainably, investment in innovation and productivity, and fair, transparent supply chains;
Food sector attracts talent and develops a skilled workforce in every region.**

SUSTAINABLE & RESILIENT SUPPLY

**Food supply is environmentally sustainable with high animal welfare standards, and waste is reduced;
Trade supports environmentally sustainable growth, upholds British standards and expands export opportunities;
Resilient domestic production for a secure supply of healthier food;
Greater preparedness for supply chain shocks, disruption, and impacts of chronic risks.**

VIBRANT FOOD CULTURES

**Celebrated and valued UK, regional and local food cultures;
People are more connected to their local food systems, and have the confidence, knowledge and skills to cook and eat healthily.**