

WELCOME!

**ECR
FOOD
WASTE
WORKING
GROUP**

IN PERSON MEETING
NOV 12TH & 13TH



REVIEW

RETAILERS ATTENDING INNOVATIONS IN FOOD WASTE SUMMIT

Dublin: Nov 12th & 13th 2025

Hosted by with support from:



ACADEMICS - UNIVERSITIES REPRESENTED





PARTICIPANTS: FIVE SEGMENTS

1. Sustainability & ESG

- Head of Sustainability
- CSO – Head of Sustainability & CSR
- Sustainability PM
- Sustainability Specialist (Food Waste)
- Sustainability Delivery Manager
- International Sustainability Manager
- Environment & Sustainability Manager
- Safety & Environment Manager
- Circularity Expert Manager
- Sustainability Executive

2. Food Waste & Operational Efficiency

- Food Waste Consultant
- Retail Availability & Waste Manager
- Food Waste Lead
- Food & In-Store Bakery Operations Manager
- Food Waste & Store Environmental Project Manager
- Operations Analyst
- A&L Operations Manager

3. Data, Analytics & Supply Chain

- Senior Data Scientist
- Data Scientist
- Senior Analyst – Supply Chain
- Operations Analytics Manager
- Lead Analytics Manager – Stock Accuracy
- Profitability Analyst
- Manager – Operations Analytics

4. Retail Operations, Process & Change

- Retail Process Project Coordinator
- Retail Change Manager
- Operations Manager
- Process Manager / Process Manager
- Product Director – Replenishment
- COO
- Manager (general retail ops)
- Expert F&V (Fresh & Produce, Sales Department)

5. Project Management & Consulting

- Project Manager
- CSR Project Manager
- Consultant
- Food Waste Consultant
- Sustainability Project Manager

AGENDA...

Day 1

- Introductions / Expectations / Agenda
- Post It Note Exercise
- Waste Reporting (Anthesis)
- AI and Food Waste (Microsoft)
- Store Visits & Debrief
- Fresh Case Cover (Rob)
- Dragons Den
- Informal Evening @ JR Mahon

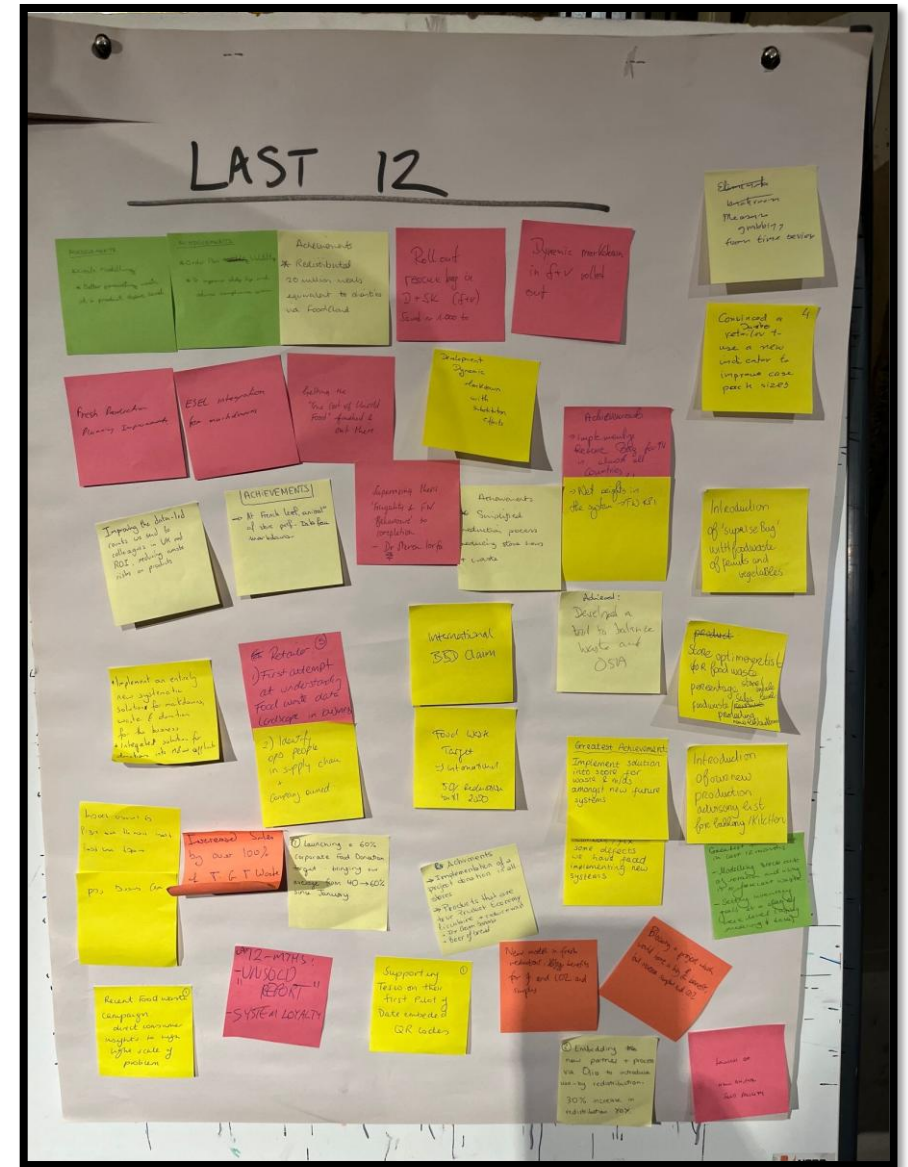
Day 2

- Dragons Den Review
- Maths & Food Waste - (Marilou & Noortje (AH))
- True Cost of Food Waste (Lisa)
- Markdowns - Finding the Sweet Spot (Rene)
- Round Table: Store Waste Routines
- What if Every Item had a Clock: (Sara)
- Round Table: QR Codes
- Improve Promotions Reduce Waste by 9% (Fabian)
- Close at 1pm

RETAILERS KEY ACHIEVEMENTS - LAST 12 MONTHS

1) Smarter Pricing & Markdown Innovation

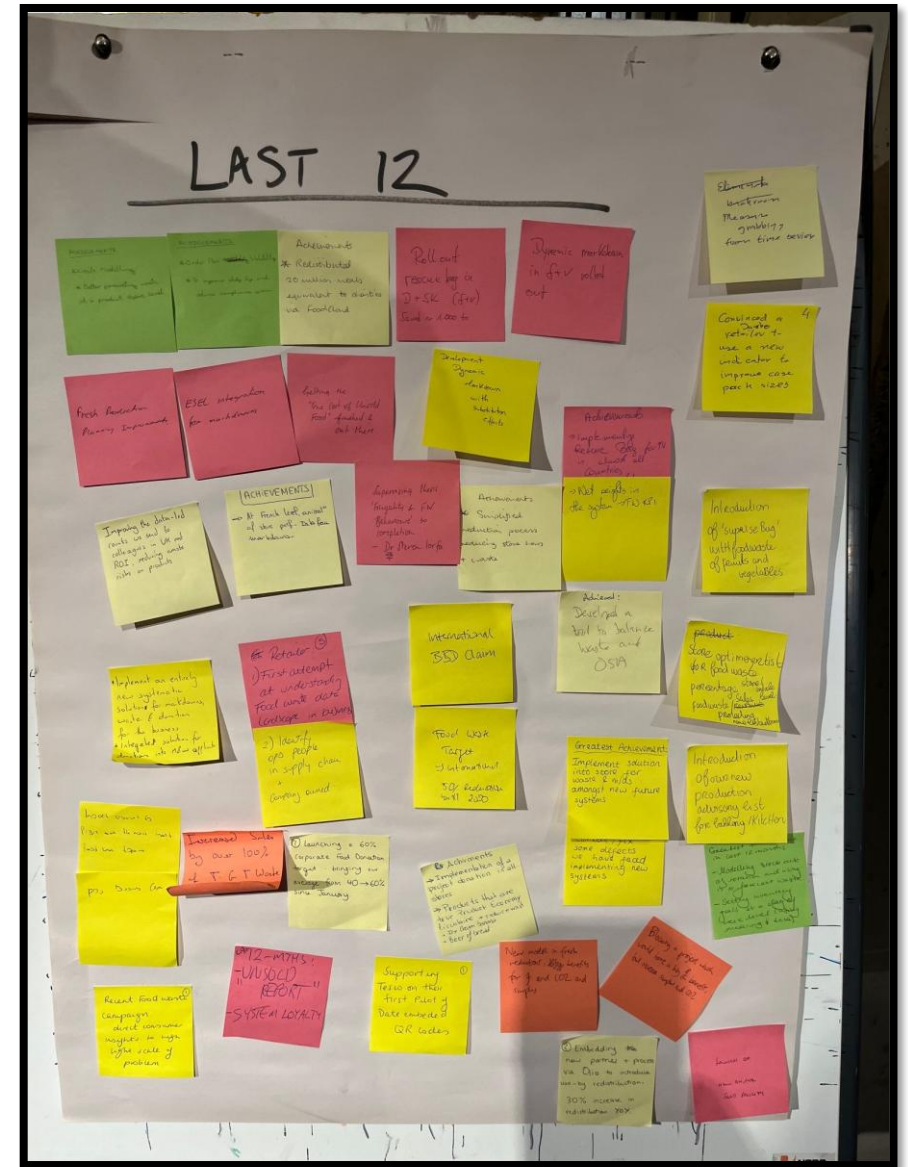
- Rollout of dynamic markdown systems for fresh food.
- Markdown algorithms that reduce waste by optimising timing and depth of reductions.
- ESL (Electronic Shelf Label) integration for markdowns, making reactive price changes easier and faster.
- Increases in salvage by over 100%.
- Better “oversell” management to keep products selling rather than expiring.



RETAILERS KEY ACHIEVEMENTS - LAST 12 MONTHS

2) Better Production, Planning & Forecasting

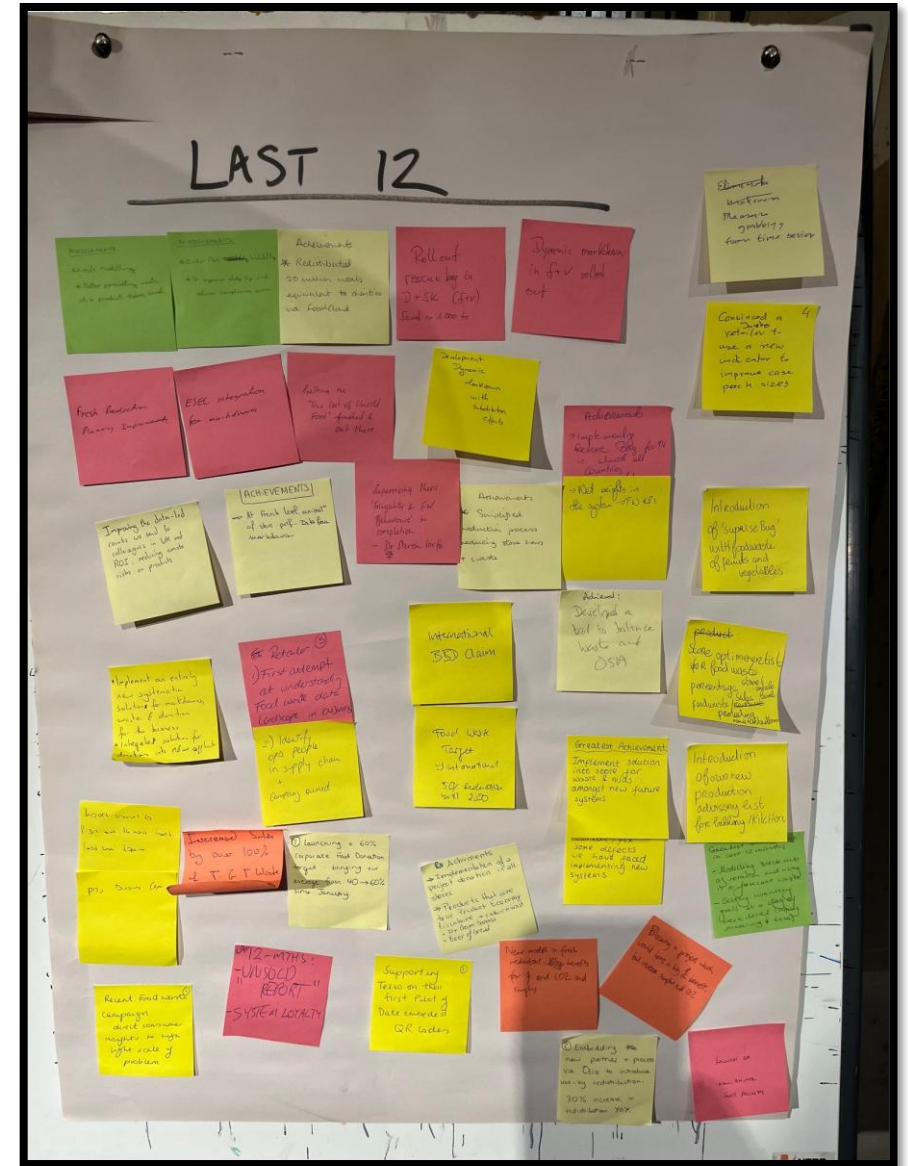
- Fresh production planning improvements.
- Reducing the volume of binned mixed goods or bakery outputs.
- Improved backroom measurement and process simplification.
- Waste reduction via improved pack sizes with a new labelling technology across multiple retailers.



RETAILERS KEY ACHIEVEMENTS - LAST 12 MONTHS

3) Packaging Innovations

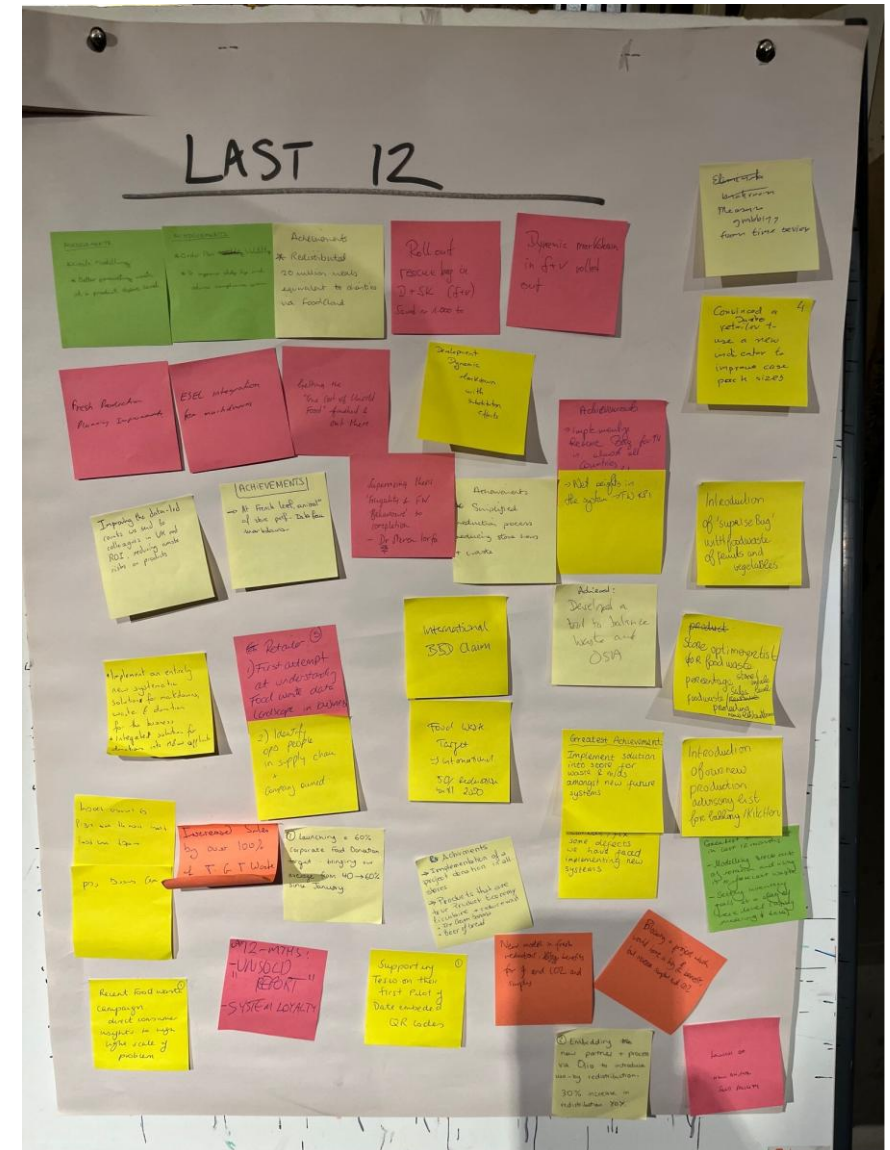
- Introduction of “sugarsnap bags” for fruits/vegetables to extend freshness.
- New reclose bags for produce.
- New processing lines that reduce waste by improving product handling and repurposing off-cuts.
- New packaging for improved case pack sizes to match demand more accurately.



RETAILERS KEY ACHIEVEMENTS - LAST 12 MONTHS

4) Redistribution & Donation at Scale

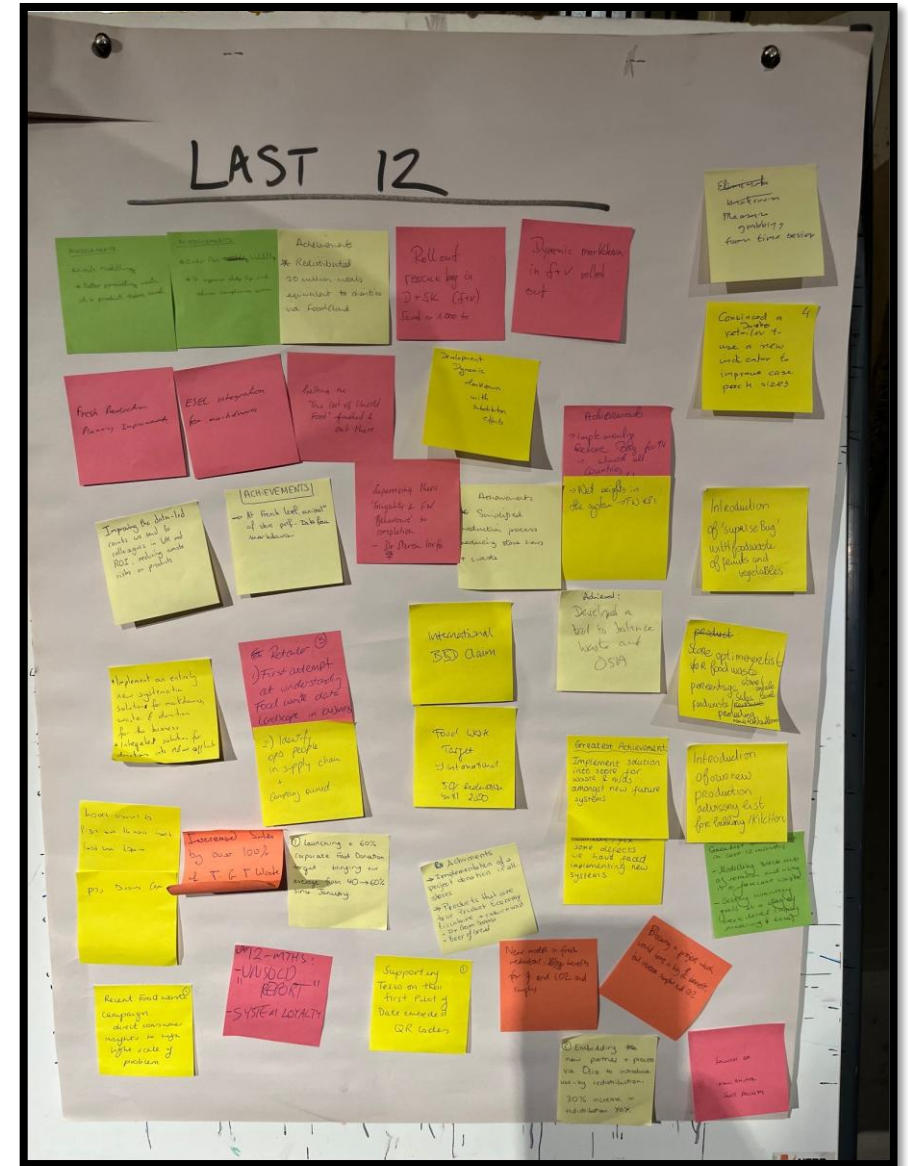
- Redistribution of 20 million meals via food-waste charities.
- Improved internal processes that enable faster pickup and redistribution.
- Store-level food waste "click and collect"-style initiatives and early attempts to understand consumer behaviour around donated food.



RETAILERS KEY ACHIEVEMENTS - LAST 12 MONTHS

5) Data, Reporting & Transparency Tools

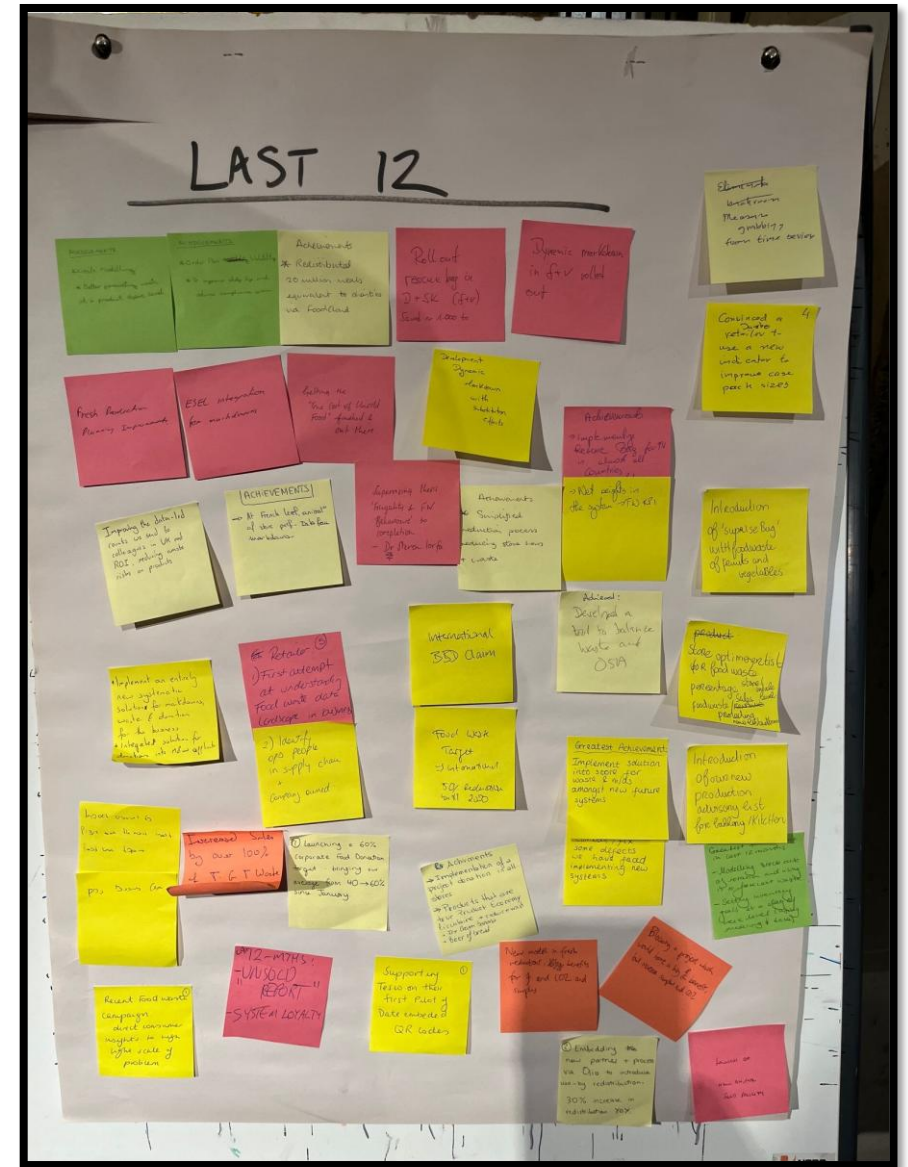
- Creation of “unsold report” tools.
- Testing of QR-code-enabled dynamic data codes.
- Improved CO₂ reporting linked to waste.
- Systematic tracking to identify waste hot spots.
- International [best practice] waste claims processing improvements.



RETAILERS KEY ACHIEVEMENTS - LAST 12 MONTHS

6. Operational Process Improvements

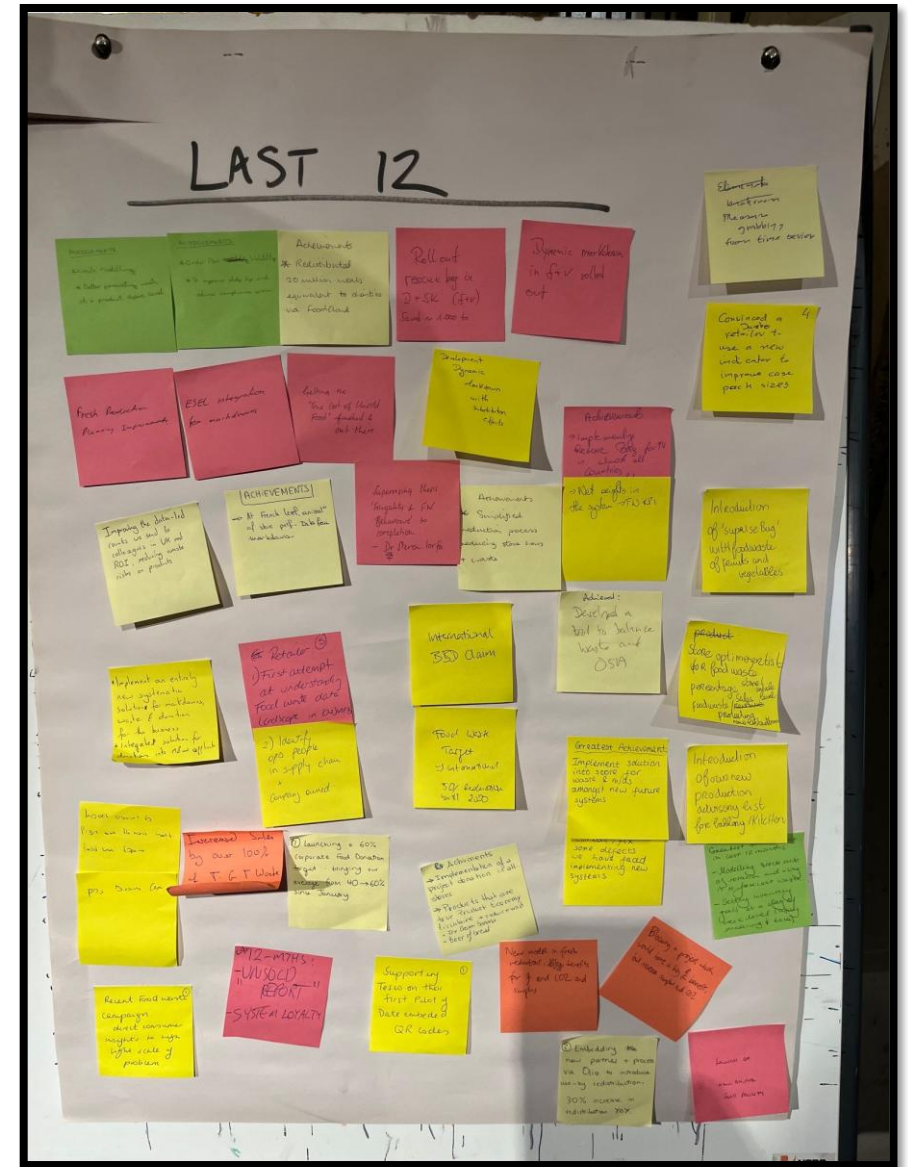
- Better staff training around shelf life.
- Improved supply chain visibility.
- Simplified processes saving "4 minutes per tray" in backroom operations (likely enabling faster product movement).
- Boosted "oversales" and improved picking/rotation processes.



RETAILERS' KEY ACHIEVEMENTS - LAST 12 MONTHS

7) Product Development to Reduce Waste

- Launch of new product ranges made from what would otherwise be wasted (e.g., repurposed produce).
- Use of trim or near-waste ingredients in new kitchen/bakery products.
- Introduction of new technology in production to reduce rejected items.



AMBITIONS -

1) Smarter Ordering, Forecasting & Inventory Management

- Improve auto-ordering accuracy
- Investigate minimum order quantities
- Reduce overproduction and unnecessary replenishment
- Upgrade logistics and supply chain visibility
- Introduce new KPIs to define “what good looks like”
- Implement forecasting tools that better model waste and demand



AMBITIONS -

2) Scaling Dynamic Pricing & Real-Time Markdown Tools

- Expanding or piloting dynamic pricing
- Accelerating rollout of dynamic markdowns
- Using data from “zero-waste indexes” or waste metrics to automate pricing
- Linking markdown logic with ESLs or backend systems



AMBITIONS -

3) Packaging & Format Innovation

- Develop new pack sizes
- Improve packaging to extend freshness
- Explore 2D barcodes / QR codes for date control and traceability
- Run pilots for QR-enabled date codes
- Reduce plastic where possible while still protecting shelf life



RETAILERS' KEY AMBITIONS - NEXT 12 MONTHS

4) Data, Reporting & Measurement Improvements

- Improve internal reporting, including CO₂-linked waste metrics
- Build clearer dashboards and more granular waste data
- Enable multi-source data consolidation
- Measure impact of new innovations through better analytics



RETAILERS' KEY AMBITIONS - NEXT 12 MONTHS

5) Redistribution Expansion

- Expanding partner coverage
- Increasing volumes donated
- Improving logistics for rescue partners
- Reducing barriers to redistribution at store level
- Linking systems so surplus can be allocated earlier



RETAILERS' KEY AMBITIONS - NEXT 12 MONTHS

6) Product & Proposition Development

- Create new products that use by-products or surplus
- Innovate fresh food propositions to reduce trim waste
- Run proof-of-concept trials for "zero waste" product lines



AMBITIONS -

7) Operational Simplification & Capability Building

- Reduce “noise” in processes and simplify back-of-store routines
- Improve colleague training and clarity
- Reduce friction for staff dealing with waste or markdown tasks
- Shift towards embedded workflows (e.g., QR-coded processes)



AMBITIONS -

8) Cross-Retailer Collaboration

- Working together on “industry-wide standards”
- Sharing learning around waste initiatives
- Creating shared waste indexes or common definitions
- Joint innovation projects

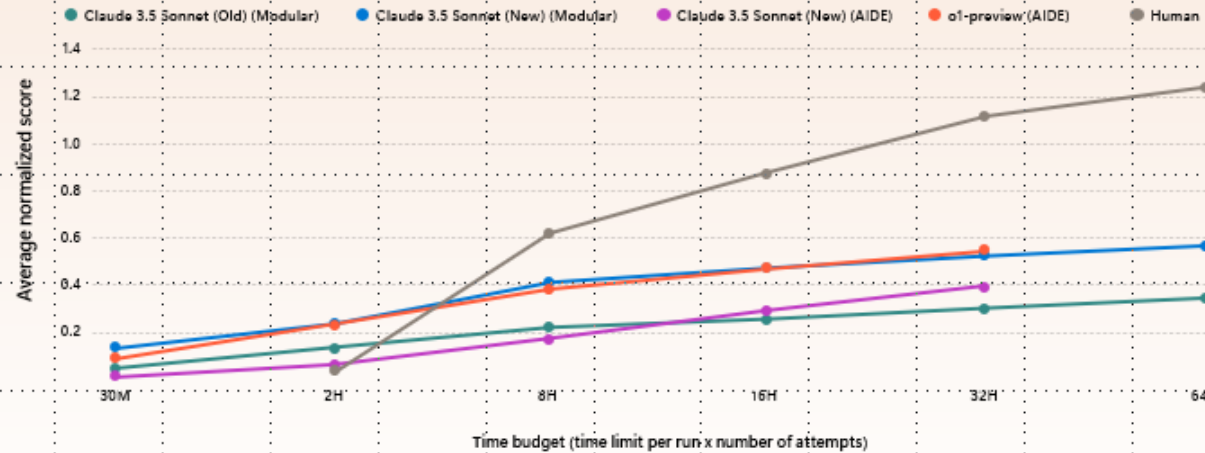


AI AND FOOD WASTE (JOHN O'DOHERTY)

Recent Benchmarks

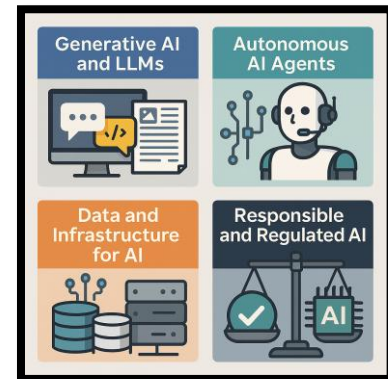
The Rise of More Useful Agents- and what does it mean for business

RE-Bench:
average
normalized
score



Source: Wijk et al., 2024 | Chart: Stanford 2025 AI Index report

- Both a threat and opportunity
- In organisations, the more senior the leader, the greater the use of AI...
- Get started.....

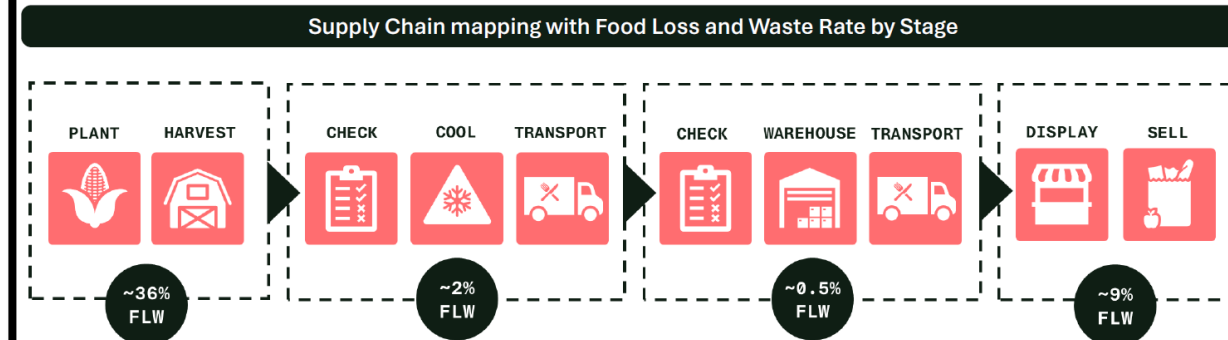


ANTHESIS (ALI CURRY)



- Retailers have it in their gift to unlock food waste
- Understand the flow and sources of FLW
- Leverage new technology, one third, etc
- Break down barriers
- Reframe barriers as opportunities

➔ Cross-value-chain collaboration to unlock waste reduction potential



Voluntary value-chain engagement and collaboration unlocks waste hotspot reduction potential

Notes:

This is a rare example of the power of cross-chain stakeholder engagement from the US. Voluntary stakeholders from growers, processors, retailers, NGOs and consultants came together to unlock causes of FLW (food loss and waste) across the value chain and understand the true hotspot waste areas with data. This in turn highlighted the true potential for reduction. Published by NGO ReFED in the USA.



➔ Our upcoming *In a Pickle* report examines the state of food waste globally



For exclusive early access email
Ali.curry@anthesisgroup.com

STORE VISITS

Food Waste Routines & Store Visit



Things that you liked, got excited about, that were new, different, etc

Things that looked like possible opportunities for growth, improvement, possible ideas to consider.

Food Waste Routines & Store Visit



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Food Waste Routines & Store Visit



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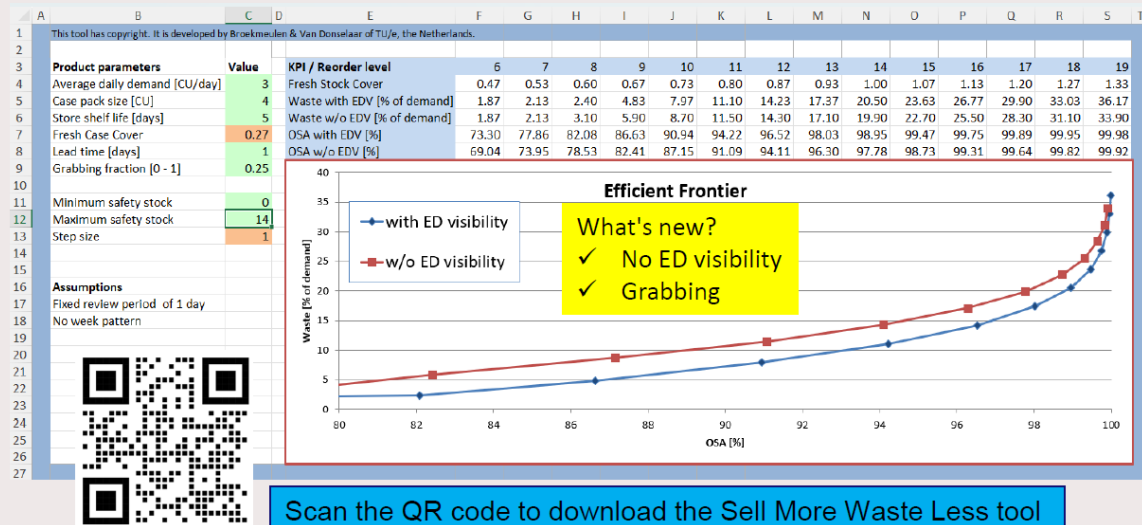


- Three stores – Lidl, Tesco and Supervalu (Musgraves)



FRESH CASE COVER (ROB)

New version of the Sell More Waste Less Tool



- Updated Model to include grabbing and Expiry Date visibility
- Free for retailers to use....
- Feedback to Rob encouraged.



Questions

- Are the estimators and/or tool applicable and useful at your company?
- By which functional departments?
- For what purposes?
- What is missing to make it applicable in your company?



For questions, pls feel free to contact: We strive for IMPACT!

DRAGONS DEN



DRAGONS DEN



**THANK
YOU TO
THE
DRAGONS**

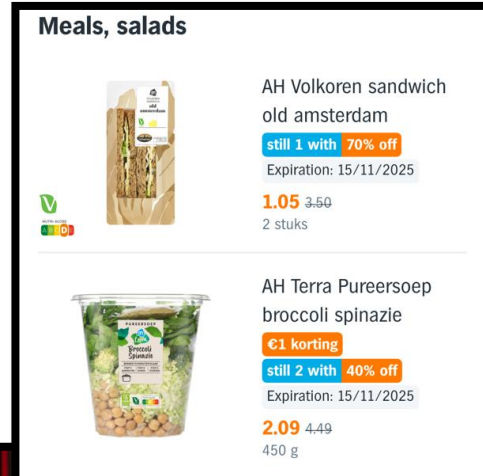
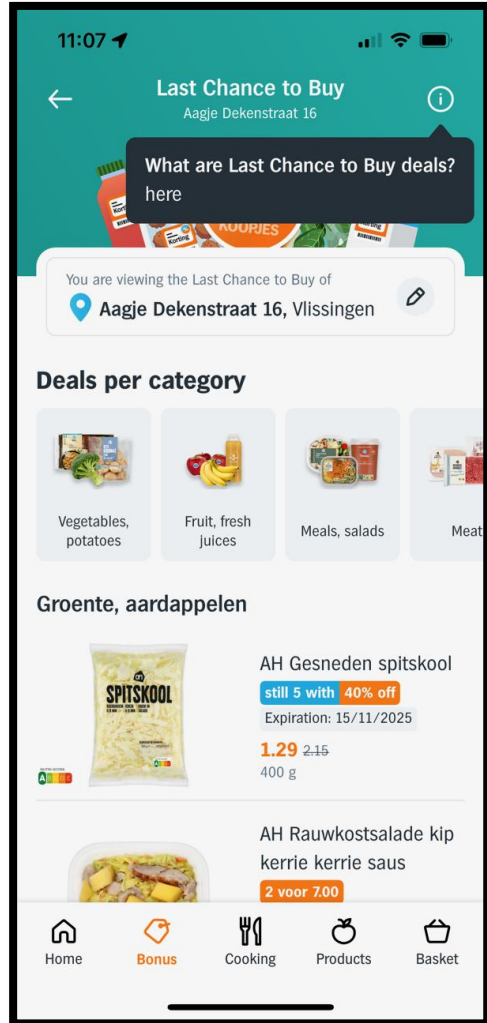




**A GREAT NIGHT IN JR
MAHON'S**



MATHS AND FOOD WASTE (MARILOU AND NOORTJE)



- Dynamic Markdowns & ESLs
- Bread of Yesterday
- Last Chance "branding" for near out of code
- App with discounted products
- Store Associate recognition in app (thank you for your part in saving the planet)

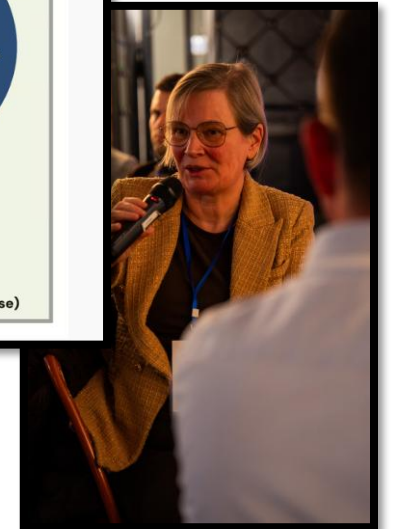
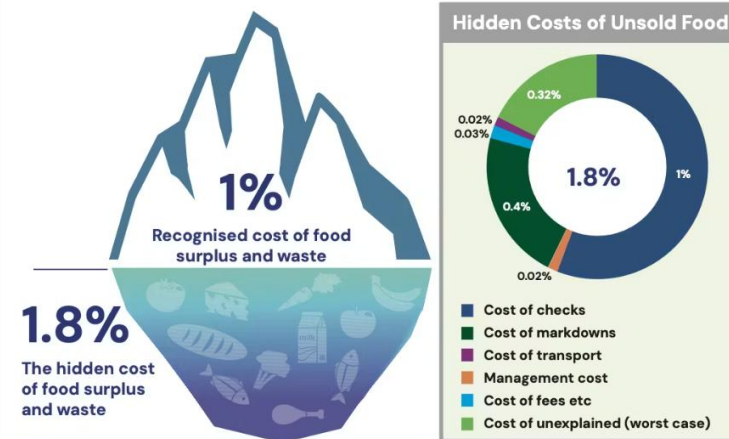


TRUE COST OF FOOD WASTE (LISA)

- First time true cost revealed (1.8% of sales)
- Opportunity for food waste experts to educate
- Identifies the lowest cost (store colleague donations) and most expensive exit routes (magic bags)



Figure 3: flowchart showing logic of model.



WHAT IF EVERY PACK OF CHICKEN FILLETS HAD A CLOCK? (SARA)

What if every item had a clock?



- New Study to explore the existing and future methods retailers do and could use to acquire visibility to the age of items in the store / DC



What you gain

- A clear **map of current visibility practices and pain points**;
- Independent view of technology readiness and process fixes;
- Better execution where it matters: rotation, availability and recalls;
- An actionable, **phased roadmap aligned to your maturity and priorities**;

FINDING THE SWEET SPOT WITH MARKDOWNS (RENE)

Numerical study

- Compare against no discounting (0%)

- D2: highest profit & lowest waste

	NO	FO	D1	D2
Profit	2.50	2.54	2.56	2.58
# sold	3.88	3.94	3.95	3.97
% fillrate	97.27%	97.25%	97.25%	97.15%
% waste	5.61%	4.23%	3.98%	3.60%

3.8% more profit

- Stickers cost: if 0.05 per item

- Profit FO is 0.03 lower
- D1, D2 is about 0.02 lower

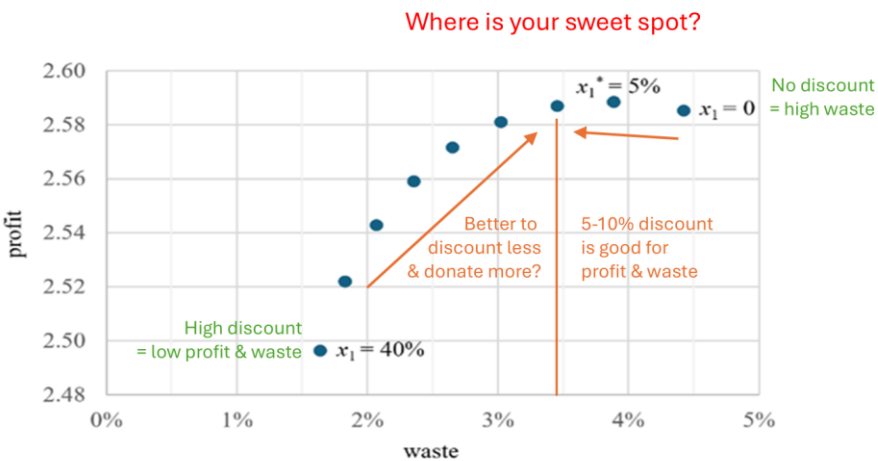
36% less waste

- To do: Cannibalization between

- Discount on A, lowers demand on B
- Holistic view → lower profit?

- New research and models on price discounting (markdowns) optimisation.
- Opportunity for retailers to partner with Rene on new modelling work.

Fixed discount of x % to all old items (at last day)



PROMOTIONS AND FOOD WASTE (FABIAN)

- Promotions **double food waste** on average
- Waste impact is **strongest for short shelf-life products**
- **Cannibalization** increases the waste of unpromoted items

- Research challenges retailers to think again about promotions, especially the promotions without any sales lift

Magnitude of the effect analysis

Based on our findings, food waste reduction opportunities of more than 9% exist for retailers

Counterfactual analysis: Food waste reduction

	Differentiation	Reduction opportunity
Promotion reduction	Avoiding overstock from sales lift promotions by 10-50%	~1-3%
	Avoiding overstock from no sales lift promotions by 100%	~3%
	Reducing promotion frequency	~1-3%
Shelf life	Shift promotions from ultra-fresh products towards products with a higher shelf life by one standard deviation (3.5 days)	~2%
	Agile adaption of order volumes for promoted short-life products	<1%
Cannibalization reduction	Reduce promotions with a high cannibalization effect by 10-20%	~1%
	Reduce overstock of unpromoted substitution products by 75-100%	~1-2%

5.2% of all product-store-week data points are promotion weeks, for which the food waste reduction potential would be relatively higher

Fabian Schäfer

TUM

At least **9%** food waste reduction potential is feasible, while retailers need to carefully assess, which promotions can strategically and tactically be avoided or overstock actively reduced

Chair of Supply and Value Chain Management | TUM 15



FEEDBACK [SOME]

- Hearing a variety of perspectives from large to small retailers, across countries with different customer behaviours. Getting re-energised by being in the same room as lots of retailers and academics who are passionate about the topics of food waste and food surplus redistribution.
- Really useful to network with so many other retailers from the UK and Europe. Fabulous to hear presentations from them and to have time and space to network in person. Enjoyed the store visits. Good to hear about relevant academic research. Great that you enable further networking post event with the email circulation list. Good venue and preparatory work to make the most out of the days.
- This was my first time attending the Summit, and as someone who's new to the area, I found it extremely valuable. It offered a great opportunity to network across the industry with like-minded individuals. One of the most beneficial aspects for me was the store visits, which allowed for direct comparison of systems and processes in action. I also really enjoyed the AH case study—it provided an excellent chance to reflect on our own roadmap against that of a more advanced retailer.
- It was our first time attending one the of summits and came away full of energy and ideas. It's was brilliant to have a collective of people all working towards the same goal and at different stages of getting there.

**WATCH
THIS
SPACE**

NEXT YEARS SUMMIT

- Timing: Mid November 2026
- Location: TBC
- Retailer Host: TBC