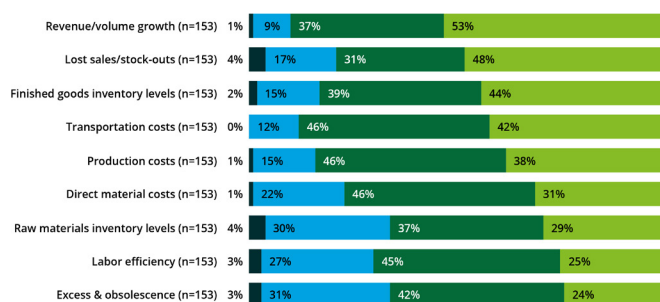




In early 2025, Deloitte conducted a survey of supply chain planning professionals within the Food & Beverage (F&B) sector to identify key trends and challenges in planning. The survey included more than 150 respondents representing nine subsectors of F&B (e.g., Dairy, Snack & Convenience foods, Frozen foods, Meat & Poultry), to provide valuable insights into **how organizations are navigating a challenging business environment by prioritizing revenue growth—through operational excellence—while simultaneously adopting strategic cost management approaches including targeted capital deployment for quick-win initiatives to enhance supply chain efficiency.**

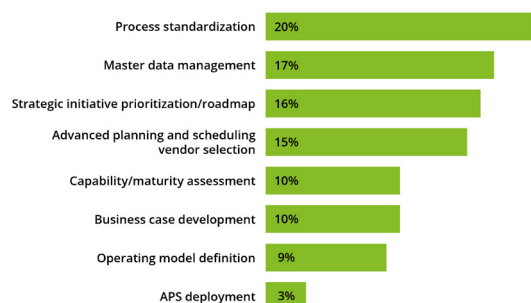
## Where would your company likely see the biggest benefits of a supply chain planning transformation?



**Unlocking potential benefits:** The survey data indicates companies are placing their highest strategic emphasis on prioritizing revenue growth, volume attainment, and the prevention of stock-outs across their supply chains. This demand-centric approach is complemented by a strong focus on cost minimization (e.g., transportation, production) and reduction of inventory days on hand. By balancing these value levers, companies are aiming to build resilient, agile supply chains that support top-line growth, margin improvement, and faster inventory turnover.

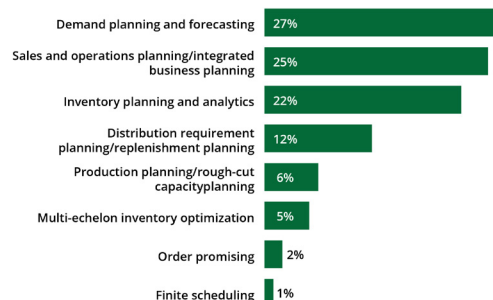
■ No impact ■ Minimal impact ■ Medium impact ■ High impact

## Have you undertaken initiatives in the past 12 months to help unlock value from supply chain planning?



**Planning value drivers:** 53% of F&B surveyed companies are prioritizing foundational initiatives—such as process standardization, master data management, and initiative prioritization—to lay a strong base for large-scale digital transformations. Meanwhile, 29% of organizations are focusing on rapid, value-driven activities including business case development, capability assessments, and operating model design to inform their long-term supply chain strategy. Notably, only 3% of respondents have progressed to full-scale execution, which indicates the challenges of successfully pursuing a supply chain planning transformation.

## Over the next 12 months, which supply chain planning capabilities will unlock your company's highest value proposition?



F&B companies are seeing the greatest value in improving forecasting and replenishment processes, with a clear emphasis on fulfilling customer needs at the core of their supply chain strategy. By accurately anticipating demand and aligning required inventory levels, organizations aim to maximize order fill rates and avoid stock-outs, continuously improving service levels. Alongside this focus, many stakeholders are investing in operational efficiency—leveraging technology, data, and streamlined processes—to reduce costs while maintaining reliable product availability.

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