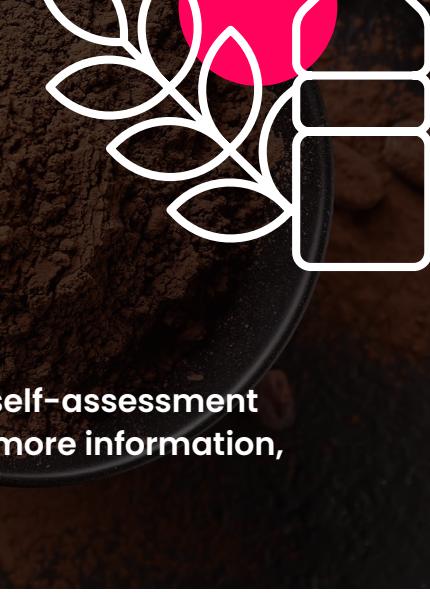


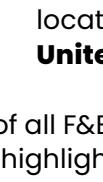
# Food & Beverage Supply Chain Risks

Insights from Sedex 2025 data



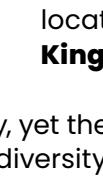
Aggregated data compiled from Sedex SMETA audits and self-assessment questionnaires across member supply chains in 2025. For more information, visit [www.sedex.com](http://www.sedex.com)

**Sedex has a foothold in the F&B industry, with 38% of all sites operating in the F&B supply chain**



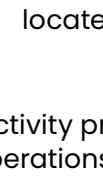
**9.5m**

Total workers at active F&B sites



**25k**

Active member organisations in the F&B industry



**45k**

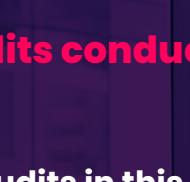
Active F&B sites

**Countries with the highest number of F&B sites**



**10%**

of F&B sites are located in the **United States**



**8%**

of F&B sites are located in **United Kingdom**

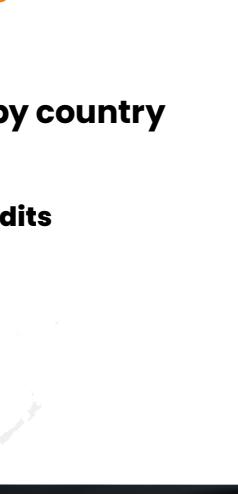
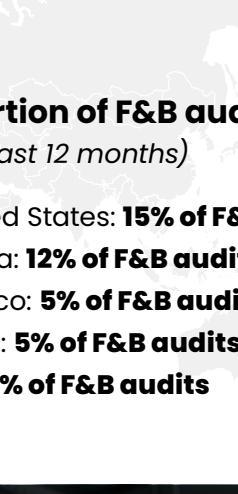


**7%**

of F&B sites are located in **Chile**

Together, these countries represent 25% of all F&B sites globally, yet their underlying activity profiles reveal distinctly different operational focuses – highlighting how the diversity of site-level operations introduces nuances that geography alone can't explain.

■ Manufacture of food products  
■ Crop and animal production, hunting and related service activities  
■ Manufacture of beverages  
■ Fishing and aquaculture  
■ Food and beverage service activities



**Over the past 12 months, the number of audits conducted across F&B sites has increased by 20%**

**Year-on-year growth of SMETA audits in this sector by activity type (2024 vs 2025)**



**14k+**

SMETA 7.0 audits conducted in the Food & Beverage sector across 2025



**+26%**

Manufacture of food products



**+39%**

Fishing and aquaculture



**+21%**

Manufacture of beverages



**+8%**

Crop and animal production

**F&B manufacturing dominated audits in 2025, with coverage across key global markets**

**Proportion of F&B audits by sector (in the last 12 months)**

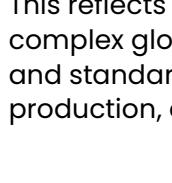
- Food and beverage manufacturing: **68% of F&B audits**
- Crop and animal production, including fishing: **31% of F&B audits**
- Food and beverage service activities: **1% F&B audits**

**Proportion of F&B audits by country (in the last 12 months)**

- United States: **15% of F&B audits**
- China: **12% of F&B audits**
- Mexico: **5% of F&B audits**
- India: **5% of F&B audits**
- UK: **4% of F&B audits**

**From raw ingredients to finished products, every stage of the F&B supply chain comes with its own set of risks.**

Exposure isn't evenly spread – it shifts depending on a business's position in the chain. Across these sectors, each has its own set of high-risk areas (inherent risk).



**Crop and animal production (including fishing)**

Forced labour (fishing)

Freedom of association

Health & Safety

Children & young workers

Wages

Working hours

Gender

Discrimination

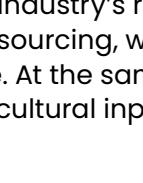
Regular employment

Biodiversity

Energy & emissions (crop & animal production)

Waste & pollution

Water (crop & animal production)



**Transportation**

Forced labour (air transport)

Health & Safety (land transport)

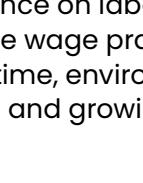
Wages (land transport)

Working hours (land and water transport)

Business ethics (land transport)

Energy & emissions (all)

Waste & pollution (air and water transport)



**Manufacturing of F&B products**

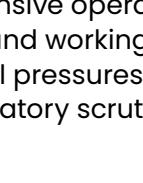
Health & Safety

Wages

Working hours

Waste & pollution

Water



**Warehousing & Storage**

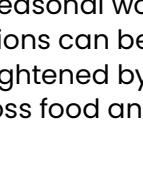
Forced labour

Freedom of association

Health & Safety

Working hours

Water & pollution



**Retail trade**

Forced labour

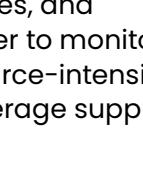
Freedom of association

Wages

Working hours

Gender

Regular employment



**F&B Service activities**

Forced labour

Freedom of association

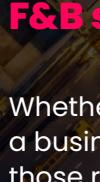
Wages

Working hours

Gender

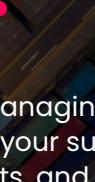
Regular employment

**Based on Self-Assessment Questionnaire responses for sites created in the last 12 months, significant gaps remain in foundational due diligence practices across F&B sites.**



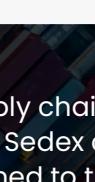
**55%**

have not carried out living wage reviews (Global average: 39%)



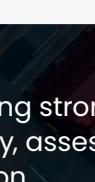
**46%**

have not assessed modern slavery risk in their own workforce or supply chain (Global average: 33%)



**40%**

lack a human rights due diligence commitment (Global average: 37%)



**26%**

do not have a written commitment to international human rights standards (same as global average)

**Ready to strengthen your F&B supply chain?**

Whether you're a buyer managing complex F&B supply chains, a supplier building stronger controls, or a business embarking on your sustainability journey, Sedex can help you turn insight into action.

**Get in touch with the Sedex team to discuss your F&B supply chain strategy**

**3 most common critical forced labour non-compliance areas**

• No or inadequate systems in place to prevent modern slavery or human trafficking within operations (56% of critical findings)

• Workers lack free access to original identification or travel documents (21% of critical findings)

• Workers are restricted from freely leaving or re-entering the workplace (21% of critical findings)

Assessing forced labour indicators provides a more nuanced view of potential risks than focusing solely on confirmed cases, helping companies identify these patterns early and target interventions effectively.

**In 2025, 86 definite forced labour indicator ('FLI') findings were identified across F&B sites through SMETA audits.**

Forced labour indicators are found in F&B audits at highlighting a significantly heightened risk profile for the sector.

Where forced labour risks are found in the F&B industry, over 70% occur at the manufacturing stage, while the remaining 30% are found at the Crop & Animal Production stage.

30% of definite findings – linked to retention of identity documents – indicating critical control gaps in worker protections

20% of definite findings – linked to retention of identity documents – indicating critical control gaps in worker protections

16% of definite findings – linked to retention of identity documents – indicating critical control gaps in worker protections

14% of definite findings – linked to retention of identity documents – indicating critical control gaps in worker protections

10% of definite findings – linked to retention of identity documents – indicating critical control gaps in worker protections

8% of definite findings – linked to retention of identity documents – indicating critical control gaps in worker protections

6% of definite findings – linked to retention of identity documents – indicating critical control gaps in worker protections

4% of definite findings – linked to retention of identity documents – indicating critical control gaps in worker protections

2% of definite findings – linked to retention of identity documents – indicating critical control gaps in worker protections

1% of definite findings – linked to retention of identity documents – indicating critical control gaps in worker protections

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