

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

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**

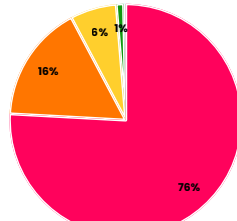


7%
of F&B sites are located in **Chile**

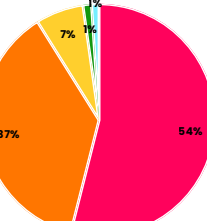
Together, these countries represent 25% of all F&B sites globally, yet their underlying activity profiles reveal distinctly different operational focuses – highlighting how the diversity of site-level operations introduces nuances that geography alone can't explain.

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

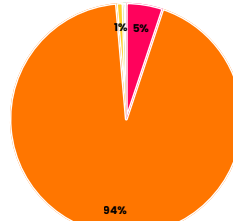
United States



United Kingdom



Chile



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



14k+
SMETA 7.0 audits conducted in the Food & Beverage sector across 2025

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

- Freedom of association



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%)



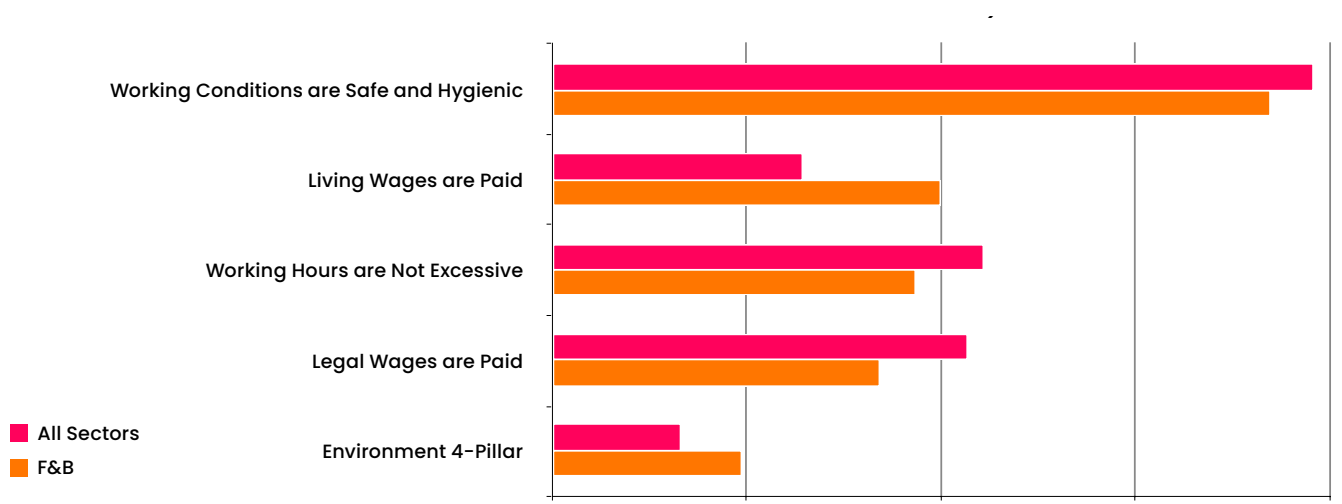
40%
lack a human rights due diligence commitment (Global average: 37%)



26%
do not have a written commitment to international human rights standards (same as global average)

The F&B industry shows a higher concentration of living wage and environmental non-compliances than the global cross-sector average

Top 5 non-compliance areas in F&B sector (last 12 months)



This reflects the industry's reliance on labour-intensive operations, seasonal workforces, and complex global sourcing, where wage practices and working conditions can be harder to monitor and standardise. At the same time, environmental pressures are heightened by resource-intensive production, agricultural inputs, and growing regulatory scrutiny across food and beverage supply chains.

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 **over double (2x) the frequency** of other industries, 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 were linked to retention of identity documents – indicating critical control gaps in worker protections

3 most common critical forced labour non-compliances

- 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.

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 identify, assess and mitigate those risks. Our data, audits, and networks are designed to turn insight into action.

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