

How Possible Happens

Filling the “value void” with technology-driven productivity in food and beverage



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Let us show you How Possible Happens

The food and beverage industry—like many others—is facing a “value void”. This is the gap between the promise of impactful productivity from the new technologies organizations have invested in and what is so often delivered.

For food and beverage manufacturers, the impetus to drive value is stronger than ever. Macroeconomics factors and evolving consumer preferences are creating complex challenges at every turn. Meanwhile, there’s a need to ensure digital transformation initiatives can effectively move the dial, simultaneously solving organizational pain points *and* unlocking value.

To fully understand what this disruptive landscape means—and how to navigate it—we’ve conducted our own global research survey. One of the largest of its kind, we interviewed over 3,600 respondents from 15 countries and seven industries, speaking to everyone from CEOs to enterprise software users.

This has uncovered exclusive insight from **500 global food and beverage organizations**, highlighting what the most productive organizations in the industry are doing to drive core business velocity and close the value void.

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Organizations getting it right today are the ones looking around corners, predicting and anticipating what comes next, and proactively tackling opportunities and risks. They’re building resilient strategies that deliver sustainable growth and use technologically optimized processes, cultural agility, and focused accountability for customers to differentiate and drive incremental transitions and sweeping transformations.”



Dr Chris Brauer
Director of Innovation,
Institute of Management Studies
at Goldsmiths, University of
London, UK

In this report, you’ll find detailed analysis of our research findings, including the attributes of highly productive food and beverage organizations, a breakdown of key focus areas for the food and beverage industry, and a detailed exploration into actions you can take to unlock value today.

Methodology

Our global research study was carried out in **May 2024** and featured **3,600 total respondents**—including Enterprise Solutions software users—across seven industries, with 500 respondents at food and beverage organizations.

Industries:



Food and beverage



Automotive



Distribution



Healthcare



Industrial manufacturing



Fashion

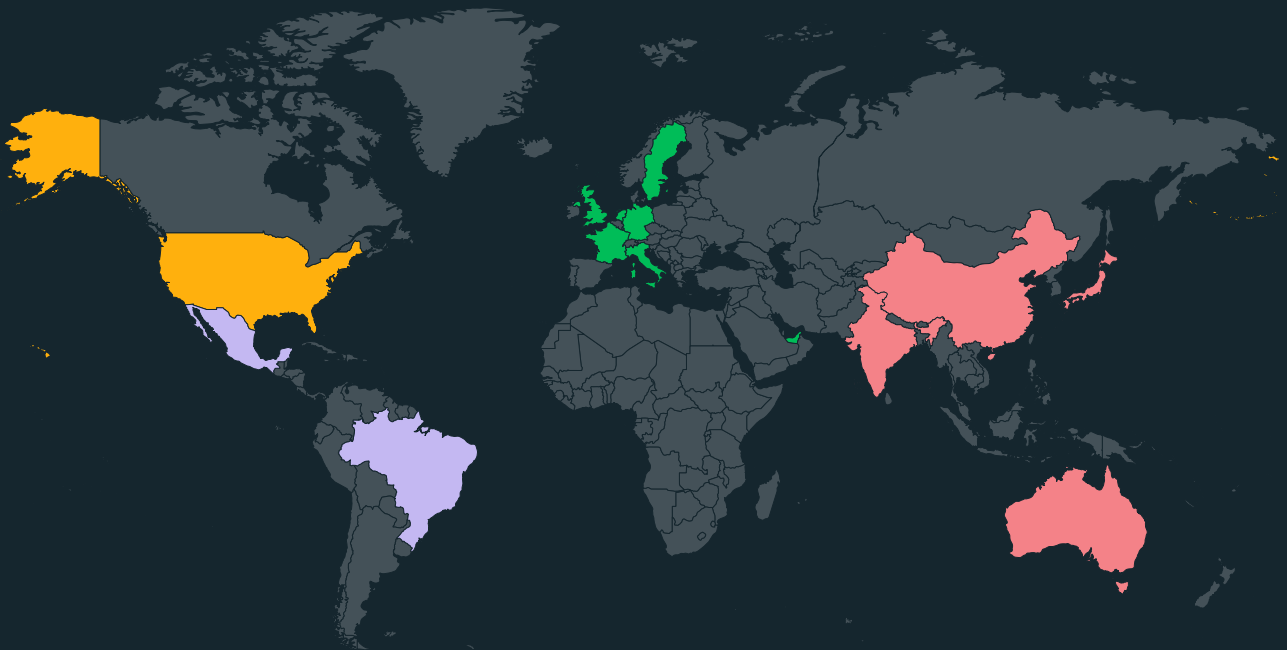


Hospitality

C-suite executives: CEOs, CIOs, CTOs, CFOs, COOs, CHROs, and other executive-level decision-makers for Enterprise Solution software

Users: Employees who work with Enterprise Solution software on a weekly basis

Regions:



■ **North America:**
USA

■ **Europe and Middle East:**
UK, Netherlands, Sweden
Germany, France, Italy, UAE

■ **Asia Pacific:**
India, Japan, China,
Singapore, Australia

■ **Latin America:**
Mexico, Brazil

Chapter 1

Understanding the complexities of today's food and beverage landscape



The food and beverage industry is vast. Its unique farm-to-fork supply chain features a wealth of different product categories, each with its own specific challenges. Digital transformation initiatives can therefore encompass everything from ensuring food supply and minimizing waste, to helping grow market share and margins. Yet for leaders, it can be challenging to assess the true value of these initiatives—especially with so many boxes to tick.

Global attitudes towards food and beverage are also shifting, holding the industry more accountable as a result. Meeting sustainability targets and producing healthier food requires significant investment, which can conflict with short-term profit goals. Plus, the pace of change means it is now imperative to become more agile—or risk getting left behind.

Considering the complexities of today's challenges, let's explore the key trends impacting the food and beverage industry.

Managing cost and pricing pressures

Ingredients, packaging, energy, transportation, and labor costs have risen, leading to higher consumer prices as a knock-on effect. Retailers are putting pressure on manufacturers in price negotiations to limit price increases, while private label products are growing, taking market share from fast-moving consumer goods (FMCG) organizations' brands.

Meanwhile, high interest rates have had a tangible impact on profits. Having visibility of costs and trade spend is more important than ever to protect margins, yet this is often incredibly challenging for food and beverage due to a lack of centralized data.

Meeting ESG regulations

There is increasing pressure—from both regulatory bodies and consumers—to reduce environmental impact through more sustainable practices, such as reducing non-recyclable packaging, cutting food waste, and adopting eco-friendly sourcing methods.

By 2025, larger organizations in the EU must report according to the [Corporate Sustainability Reporting Directive \(CSRD\)](#) (PwC, 2024). Europe is also introducing the [Digital Product Passport](#) from 2026 for transparency of the environmental footprint and circularity of products, while the [Securities and Exchange Commission \(SEC\) is introducing a sustainability disclosure in the US](#) (PwC, 2024) (CNBC, 2024). As these standards increase in complexity, so do the transparency requirements of any chosen technology solution—something the US is already seeing with the introduction of [increased traceability regulations](#) by the Food Safety Modernization Act (FSMA) (FDA, 2024).





Overcoming supply chain disruption and workforce shortages

Geopolitical instability and labor shortages continue to impact the availability and cost of ingredients. Plus, weather conditions such as heatwaves, droughts, and floods can devastate crop yields, resulting in crop loss and increasing pressure on productive farmland.

Agility is the key to dealing with unforeseen circumstances—yet this is impossible for many due to siloed data streams and a lack of supply chain visibility.

Our research found that only 61% of food and beverage organizations have *some* visibility into parts of their supply chain, but crucially not complete visibility and not in real time.

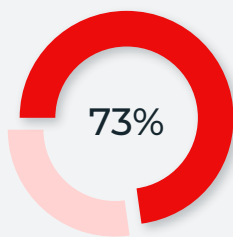
Food and beverage organizations are starting to move the dial—for example, investing in automation to offset the shortage of workers. But without the right insights into how this technology should be applied, organizations will struggle to derive true value.



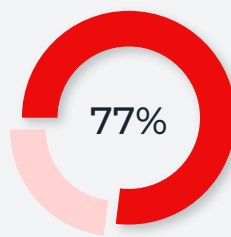
Food and beverage organizations globally are navigating complex climates with shifting circumstances at every turn. Yet they also share a similar ambition: They want to see **value creation**. And technology investment could be the way forward.

The power of technology

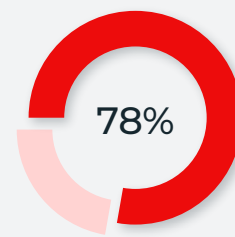
The food and beverage industry as a whole has yet to fully immerse themselves in a digital transformation, with a 2023 report suggesting [spending on innovation efforts had slowed](#). Despite this, our research found that **food and beverage organizations understand technology is a way to unlock productivity**—and therefore value—and are willing to invest in new solutions to reach their goals.



73% of food and beverage organizations expect productivity increases, with 24% of those expecting increases of 20% or more



77% of food and beverage organizations expect to see an increase in technology investments, with 19% of those expecting increases of 20% or more



78% of food and beverage organizations agree that success in their industry will depend on use and adoptability of new technologies

[This 2024 McKinsey survey](#) of consumer-packaged goods (CPG) leaders found that 71% had adopted artificial intelligence (AI) in at least one business function of their organization (up from 42% in 2023), while 56% said they were regularly using GenAI (McKinsey, 2024).

While this aligns with our research results—that food and beverage organizations are prioritizing technology investment—the same article suggests they have reported adopting GenAI at a lower rate than other industries, such as technology, media, and telecommunications.

This may be because leaders lack tangible guidance around where and how this technology can make a significant impact on closing the value void. Without a food and beverage industry-specific lens, it's difficult to imagine how it can work for your organizational use cases—or to feel confident in definite outcomes.

Although technology is critical for success, the right solution has to be deployed in the right way to achieve value creation. It's not a one-size-fits-all approach.

So, what does this technology look like? What do the most productive food and beverage organizations do with technology that sets them apart? And crucially, how do they unlock a productivity advantage that delivers both core business velocity and proof of value?

What does the most productive organization look like?

Productivity in the context of our research is defined as a strategic tool to drive profits, increase shareholder value, and accelerate product innovation.

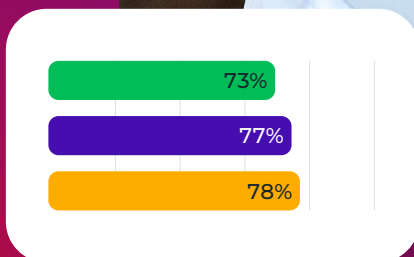
The *most productive* organizations are defined by certain characteristics. Not only do they self-report as being more productive than others in their sector, they have also experienced higher revenue growth over the last three years.



From our research, we've identified the attributes where the most productive organizations are doing well and titled them **Vectors to Value**. These vectors are our anchor points, enabling us to explore how food and beverage organizations can fill the value void through facilitating technology-driven productivity.

Chapter 2

Vectors to Value



Vectors to Value

The following **four vectors** describe our most productive organizations.

1 Processes and systems

They make bullet-proof processes a competitive advantage.

Processes are highly tuned and intelligent. Technology provides the visibility to identify and unlock optimization potential, while creating process resilience.

2 Agility and future-readiness

They're agile, adaptable, and future-ready.

Advanced technologies like GenAI, Robotic Process Automation (RPA), and Process Intelligence are used to de-risk and respond faster to the turbulent and unpredictable nature of the modern world—continually being able to pinpoint what's working and what isn't, optimizing existing investments, and always being ahead of the pack.

3 Culture of data

They're pushing boundaries through the power of data.

They've drawn on input from intelligence and automation to establish a comprehensive data foundation. This empowers their workforce with access to the right insights, at the right time, allowing them to innovate and unlock more value at every turn.

4 Customer focus

They're customer outcome obsessed.

Their success is defined by their customers' success; their revenue growth by their customers' revenue growth. They build customer feedback into every part of their organization, striving to anticipate their customers' needs and being accountable for their value realization.

Chapter 3

Putting productivity into practice



In our research analysis, we found clear similarities across the most productive food and beverage organizations. We aligned a number of the top attributes to each vector, building a list of the most influential value drivers of each organization’s productivity advantage.

Each attribute is defined by a data point. This percentage is the difference between the most and least productive organizations who are performing these individual attributes well—spotlighting where less productive companies should focus their efforts to emulate the highest performers in their industry.

Comparing industry data splits across each vector’s relevant attributes has enabled us to build a picture of how organizations can harness their core business operations as a competitive differentiator.



1

Processes and systems

Organizations make bullet-proof processes a competitive advantage.

Process is at the center of everything your organization does. So, it makes sense that the most productive organizations have processes that are highly tuned and intelligent, leaning on technology to ensure seamless operations and to identify areas of improvement.



Research analysis

Comparing the most productive and least productive food and beverage organizations, we've established the gap between them, with the global average gap represented in the below percentages.

The following **two** attributes from our survey are aligned to this vector:

Processes and systems

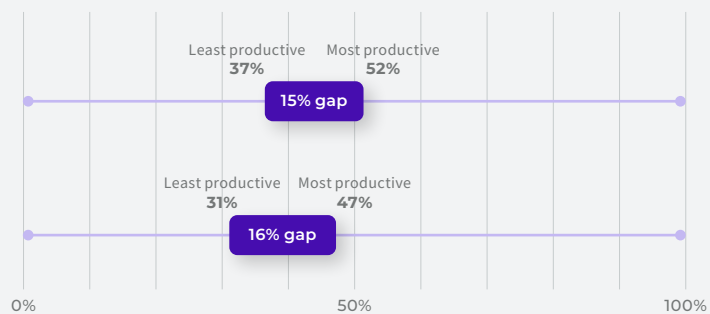
This diagram takes the percentages of the most and least productive organizations who are performing these individual attributes well, and spotlights the difference between them. The bigger the gap, the greater the opportunity to drive performance and unlock value.

1. Processes for productivity

Our organizational processes enable us to be as productive as possible

2. Tools for performance visibility

Digital tools and systems have improved visibility into our process performance



The two stand-out attributes aligned to this vector—where the gap is biggest between the most and least productive organizations—are around processes for productivity and tools for performance visibility.

The research revealed regional nuances across both attributes. In attribute one, **Processes for productivity**, the EMEA region hovers around the food and beverage global average (14.6%) with a gap in performance of 15%, while North America's gap is slightly smaller (9.1%), highlighting a possible disparity in approaches towards building bullet-proof processes. Meanwhile, both EMEA and APAC regions exceed the food and beverage global average (15.8%) on our second attribute **Tools for performance visibility** with 20% and 27.8% respectively, demonstrating a greater opportunity for the less productive organizations in these regions to channel their attention into improving visibility.

And they might be onto something. For food and beverage organizations, efficiency of operations can be make or break. Visibility into real-time sales and inventory data helps accurately forecast demand, reducing both shortages and overstock and helping optimize inventory levels. Not only does this boost process performance, but it lays the foundation for greater responsiveness, helping them better cope with demand changes and supply disruptions. Plus, having a complete view of the supply chain means more comprehensive traceability, helping organizations adhere to stringent regulations and meet sustainability goals.

But the benefits of greater visibility go beyond this. In fact, a centralized software platform can provide visibility into data from all areas of an organization, informing highly tuned, intelligent processes as a result. For example, cost visibility enables more effective business budgeting and forecasting accuracy; real-time food management data—such as expiry or shelf life—reduces waste; and production efficiency insights can be used to improve overall equipment effectiveness.

Powering process protection



Fast-growing global food manufacturer, **Frontier Co-op**, needed a platform that would secure its processes and sustain its different responsibilities (Infor, 2024).

With Infor GRC, Frontier were able to simplify and streamline its operations through process automation. In addition, the system identified and analyzed risks for the organization.

The impact of this was two-fold: Frontier's IT team was able to save an expected 10% of time typically spent evaluating potential violations, and the organization had peace of mind that risks were mitigated.

By partnering with Infor, Frontier's processes were secured, costs savings were improved, and productivity was enhanced—something that would have required a dedicated, skilled team if Frontier hadn't taken a high-level approach.

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A leading frozen food manufacturer in North America determined the value drivers in the business and more accurately allocated costs to their products. This cost visibility helped rationalize the product portfolio to respond to the emerging and ongoing economic challenges in the food industry. Supply chain visibility helped to respond swiftly to the demand changes at the beginning of the pandemic.”



Marcel Koks
Senior Director of Industry
Solution Strategy for
the food and beverage
industry at Infor

infor

2 Agility and future-readiness

They're agile, adaptable, and future-ready.

A key component to value creation is the ability to weather all storms. As the turbulent and unpredictable modern world delivers disruption at every turn, the most productive organizations are relying on advanced technology—such as GenAI, RPA, and Augmented Intelligence—to keep them steady.



Research analysis

Comparing the most productive and least productive food and beverage organizations, we've established the gap between them and identified a global average represented in the below percentages.

The following **two** attributes from our survey are aligned to this vector:

Agility and future-readiness

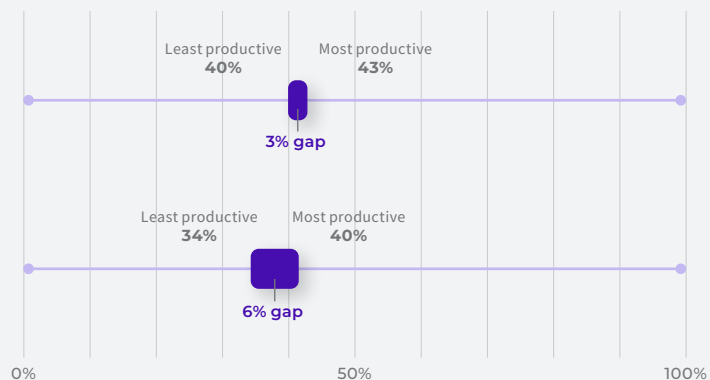
This diagram takes the percentages of the most and least productive organizations who are performing these individual attributes well, and spotlights the difference between them. The bigger the gap, the greater the opportunity to drive performance and unlock value.

1. Technology for predictive intelligence

Our use of advanced technologies helps us predict events so that we can take early action

2. Technology for innovation

We leverage digital technologies for faster product innovation



Again, our research indicates differences between how regions are approaching each attribute. For attribute one, **Technology for predictive intelligence**, the EMEA and APAC regions were both notably higher than the global average (2.7%) with gaps in performance of 15% and 9% respectively. This shows there is greater opportunity for the less productive organizations in these regions to embrace advanced technologies to predict and act on events such as supply chain disruption and changing regulations. A potential cause for these findings could be that more companies in these regions are using advanced forecasting tools in response to the diversified, less consolidated sales channels.

With a gap in performance of almost three times the global average (6.2%) for attribute two, **Technology for innovation**, the North American region's gap of 18.2% demonstrates a greater opportunity for less productive organizations to catch up by innovating products through the use of digital technologies. This difference is potentially fueled by the sheer scale of the food and beverage industry in this region, which leads to larger product portfolios, increased economic capabilities to implement the necessary technologies, and a highly competitive market.

Technologies such as digital automation can improve nearly every stage of the production and distribution process, from sourcing ingredients to delivering finished products to customers. Having the ability to tailor digital automation capabilities to solve complex needs can help food and beverage organizations gain a significant advantage over their competition, increasing value creation as a result.

The truth is, the availability of novel solutions is plentiful—and the sooner the food and beverage industry embraces these possibilities, the better. For example, product innovation is a key differentiator for food and beverage organizations. The need to develop new product lines to meet new and evolving consumer tastes is omnipresent. Cross-functional product lifecycle management software can help achieve this through streamlining every step of the process and addressing potential risks, driving faster introduction of new recipes that meet consumer desires at specific price points.



Digital transformation in food and beverage: Connecting shop floor to strategy



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The food and beverage industry is experiencing unprecedented transformation driven by changing consumer preferences, regulatory pressures, and supply chain complexities. Leaders in the industry are focused on three critical areas: operational resilience, data-driven decision making, and sustainable practices.

Success requires moving beyond traditional manufacturing approaches to embrace intelligent operations. By leveraging cloud technology, AI/ML, and advanced analytics, companies can gain real-time visibility across their supply chains, optimize production processes, and better predict demand patterns. This digital foundation also enables faster response to food safety issues through improved traceability.

The most successful organizations are those taking a holistic view—connecting their shop floor to top floor through integrated systems that provide actionable insights. While technology is crucial, it must be paired with industry expertise and careful change management. Companies that strategically combine these elements are better positioned to drive innovation, maintain quality, and deliver value in today’s dynamic market environment.”

Justin Honaman
Head, Worldwide Retail, Restaurants & Consumer Goods
Business Development / Growth, AWS



3 Culture of data

They're pushing boundaries through the power of data.

Best data practices are arguably the foundation of all successful decision-making. The highest performing organizations activate their data in more insightful ways in their core business operations, enabling them to innovate and unlock value at every turn.



Research analysis

Comparing the most productive and least productive food and beverage organizations, we've established the gap between them and identified a global average represented in the below percentages.

The following **four** attributes from our survey are aligned to this vector:

Culture of data

This diagram takes the percentages of the most and least productive organizations who are performing these individual attributes well, and spotlights the difference between them. The bigger the gap, the greater the opportunity to drive performance and unlock value.

1. Cultural appetite for innovation

Our organizational culture embraces technological advancements

2. Data visibility for smarter decisions

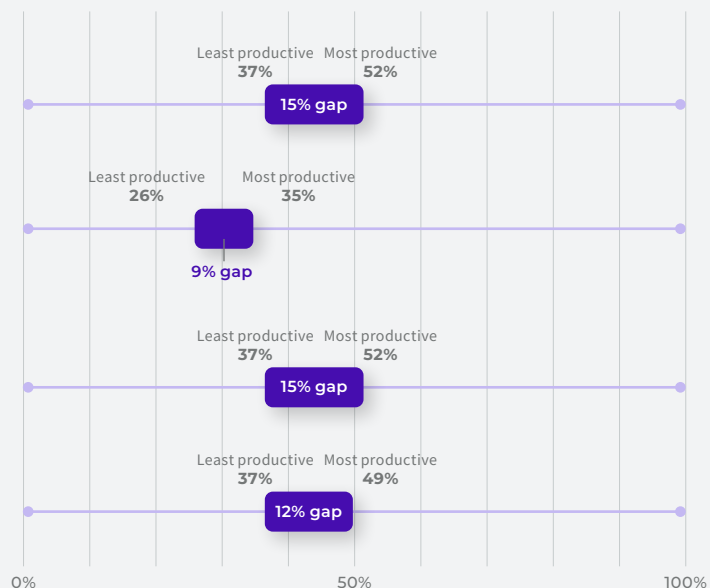
Our employees are equipped to make data-driven decisions

3. Data analysis for increased productivity

We leverage data and analysis to improve the way we work and product(s) we offer

4. Data insights for better-informed decisions

We have access to relevant data to help inform better decision-making



The regional nuances continue across attribute one, **Cultural appetite for innovation**, and attribute two, **Data visibility for smarter decisions**, with North America possessing the largest gap in performance at 18.2% for both. This demonstrates a greater opportunity for the less productive organizations in this region to create a culture that embraces technological advancements, while equipping their employees with the data visibility necessary to make smarter decisions. In comparison, the EMEA region's gap of 10% is lower than the global average of 14.6% for attribute one, **Cultural appetite for innovation**. Here, the most productive organizations are embracing and deriving value from data—and as an extension, the power of maximizing technology to put that data to best use.

In attribute three, **Data analysis for increased productivity**, and attribute four, **Data insights for better-informed decisions**, the average global differences are of a similar size to one another (14.5% and 12.3% respectively).

For these attributes, the most productive organizations are leveraging their data insights to improve processes, products, and decision-making.

Using a centralized platform, food and beverage organizations can analyze and review their data from a single source of truth. This approach also leads to improved data governance to ensure the highest data quality: The more accurate the data, the more actionable the insights. For example, AI (Machine Learning) uses real-time data to inform more effective product and price recommendations, driving value creation through increased sales and margins.

On top of this, integrated analytics—without the need for a separate system—enhances decision making based on data-driven insights. A manufacturing execution system can be used to control the execution and collection of real-time data from a food and beverage organization's manufacturing operation, equipping teams with the know-how to improve equipment uptime and increase output.

4 Customer focus

They're customer outcome obsessed.

Thinking beyond their own success to their customers' is second nature to our high-performing organizations.

Customer feedback informs every decision, and they use it to shape their services to ensure customer needs are met.



Research analysis

Comparing the most productive and least productive food and beverage organizations, we've established the gap between them and identified a global average represented in the below percentages.

The following **two** attributes from our survey are aligned to this vector:

Customer focus

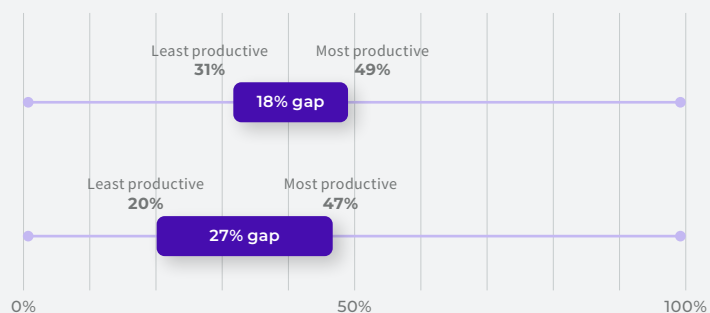
This diagram takes the percentages of the most and least productive organizations who are performing these individual attributes well, and spotlights the difference between them. The bigger the gap, the greater the opportunity to drive performance and unlock value.

1. Feedback integration

We integrate customer feedback and insights into our product innovation processes

2. Customer-usage insight

Smart technologies are embedded in our products and services to better understand how they are used



In attribute one, **Feedback integration**, North America demonstrates the biggest gap in performance for integrating customer feedback into product innovation (27.3%) in comparison to EMEA (10%) which is smaller than the global average of 18%. The reason for this regional difference could be due to North America's larger average company sizes which has resulted in them implementing more mature product management operations.

On the other hand, for our second attribute **Customer-usage insight**, EMEA and APAC take the lead, with 30% and a huge 42.7% gap respectively—both of which are significantly larger than the global average (27.2%). Here, organizations wanting to keep up with their most productive competitors should look to embed smart technologies into their products and services to better understand how they're used.

It's clear that customer input is critical for product innovation. This is where agility becomes imperative—without that, food and beverage organizations are unable to keep pace with rapidly changing consumer preferences. On the flip side, taste consistency also shapes product lifecycle management. Formula optimization—finding ways to lower recipe cost and resources—may be an evergreen goal for most food and beverage organizations, but if that process ends up altering the taste of a much-loved product, it could result in a devastating impact on sales.

Ultimately, there is very little margin for error. Food and beverage organizations need an industry-specific ERP to cater to their unique and highly specialized needs—and by extension, their customers'. Combining a mix of prebuilt functionality with configurable capabilities enables food and beverage organizations adapt, innovate and differentiate to whatever comes next.

Chapter 4

Partnering to close the “value void”



True value lies at the heart of an organization—directly at the intersection of industry-specific operational *processes*, *people*, and the *products* made. And to really maximize unique potential, organizations need a technology partner that fully understands all three. This is where Infor’s capabilities can position food and beverage organizations for success.

Offering micro-vertical industry functionality, Infor CloudSuite for food and beverage organizations enables them to leverage robust industry solutions with the highest performance and resiliency. All within a cloud computing environment delivering the highest-quality global network performance with strong sustainability and security credentials.

Infor CloudSuite™ for food and beverage organizations is an industry cloud platform that connects every business process to drive operational efficiency, ensure future business agility, and unlock value creation.



Food and beverage expertise baked in

Our purpose-built solutions are designed by food and beverage people, for food and beverage people.



Future-proof innovation

Cloud-native platform allows for limitless innovation, with always-on cloud service providing automatic access to the latest upgrades with no agonizing wait times.



Higher value, lower risk

Preconfigured, proven industry processes enable lightning-fast adoption focused on agility, profitability, and velocity, helping drive more value at a quicker pace.

Act now to avoid getting left behind

Food and beverage organizations are on the cusp of a shift that can deliver huge business productivity and efficiency gains, allowing them to unlock value streams and tangibly impact revenue growth.

Yet while it's true that digital transformation needs to be measurable and aligned with business goals, the shape of this may look drastically different to other sectors. Therefore, the power lies in implementing technology aligned to specific food and beverage use cases, with demonstrable proof-of-value.

As discussed, there are four essential areas in which food and beverage organizations should invest their efforts: building bullet-proof

processes, becoming more agile and future-ready, embracing the power of data, and creating a customer-obsessed culture.

Through collaboration with the right partner, organizations can access tailored digital strategy underpinned by a wealth of industry-specific experience. With the backing of a technology partner such as Infor™, food and beverage organizations can put themselves on the path to progress—and position themselves for competitive advantage.

This is how food and beverage organizations can drive value.

This is how possible happens.





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About Infor

Infor is a global leader in business cloud software products for companies in industry-specific markets. Infor builds complete industry suites in the cloud and efficiently deploys technology that puts the user experience first, leverages data science, and integrates easily into existing systems. Over 67,000 organizations worldwide rely on Infor to help overcome market disruptions and achieve business-wide digital transformation.

Ready to make possible happen?

Get in touch:

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