Lumina Intelligence

2026

Climate-Smart Resilience Report

Brochure

About the Report

The Climate-Smart Resilience Report 2026 is Lumina Intelligence's definitive guide to how food and beverage manufacturers are responding to climate risk, environmental disruption and growing pressure to build resilience across their operations and supply chains.

Based on a global survey of 250 senior decision-makers across food, drink, ingredient and FMCG manufacturing businesses, the report provides an evidence-based assessment of how organisations are approaching climate resilience and where future investment is likely to be focused.

The research explores the growing disconnect between recognising climate resilience as a strategic priority and embedding it within corporate strategy. It uncovers how environmental risks are reshaping supply chains, investment decisions, technology adoption and long-term business planning, while highlighting the barriers preventing organisations from scaling climate-smart initiatives.

Main Themes

A priority without a strategy

Over half (54%) of respondents say that climate resilience is either 'very important' or 'extremely important' to their company, yet less than one in ten (6%) say it has been embedded in their corporate strategy. Instead, implementation is driven at the operational rather than the boardroom level.

Cost savings, not carbon reduction, drive investment

Cost reduction is the primary driver of climate resilience investment, according to 53% of respondents. Similarly, 56% measure investment success through financial saving. Just 14% measure success based on carbon reduction, reflecting how climate resilience is still treated as a cost centre, and not a core strategy.

Long-term resilience, short-term outlook

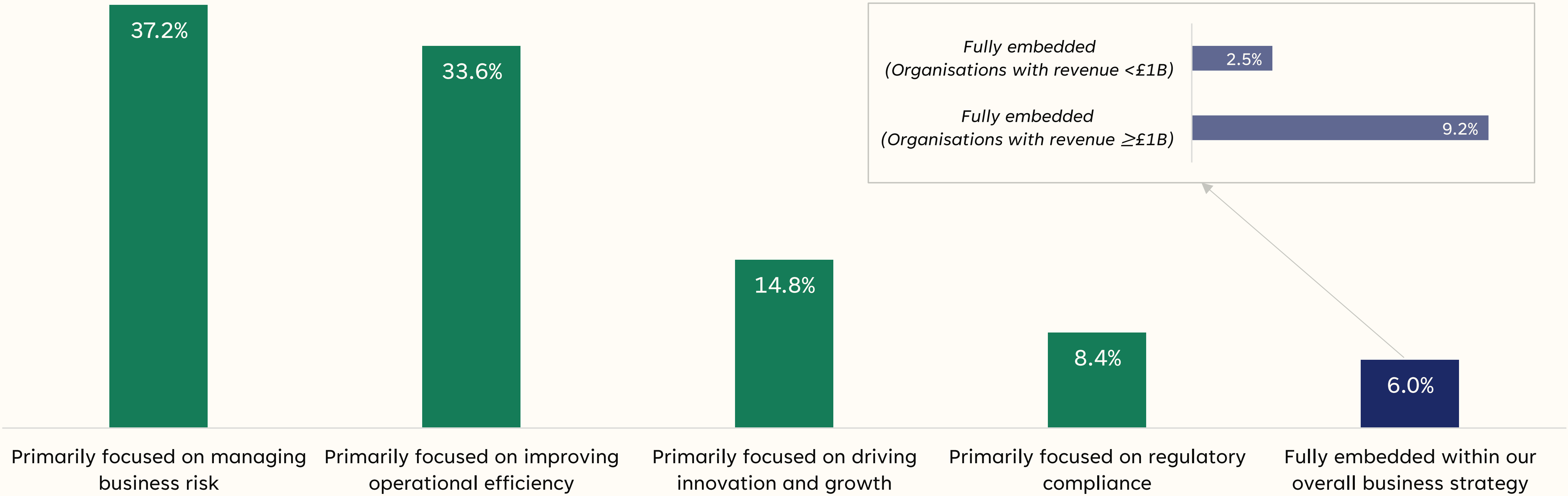
The vast majority (88%) report at least moderate commercial value in climate-smart initiatives but expect a return within one to five years. Climate resilience is being asked to prove its commercial value in a fraction of the time typical capital investments are evaluated - over 10-year horizons.

Sample Slides

Low priority means limited strategic integration

Only 6.0% have integrated climate resilience into core strategy, though organisations universally acknowledge climate risks. For the rest, climate resilience is a component of compliance, risk management, or operational efficiency. Revenue scale is also a meaningful factor: 9.2% of organisations above £1 billion in revenue report full integration, vs. 2.5% below that threshold — most of survey respondents. The pathway to full integration will be different for different sized organisations.

Corporations' current approach to climate resilience

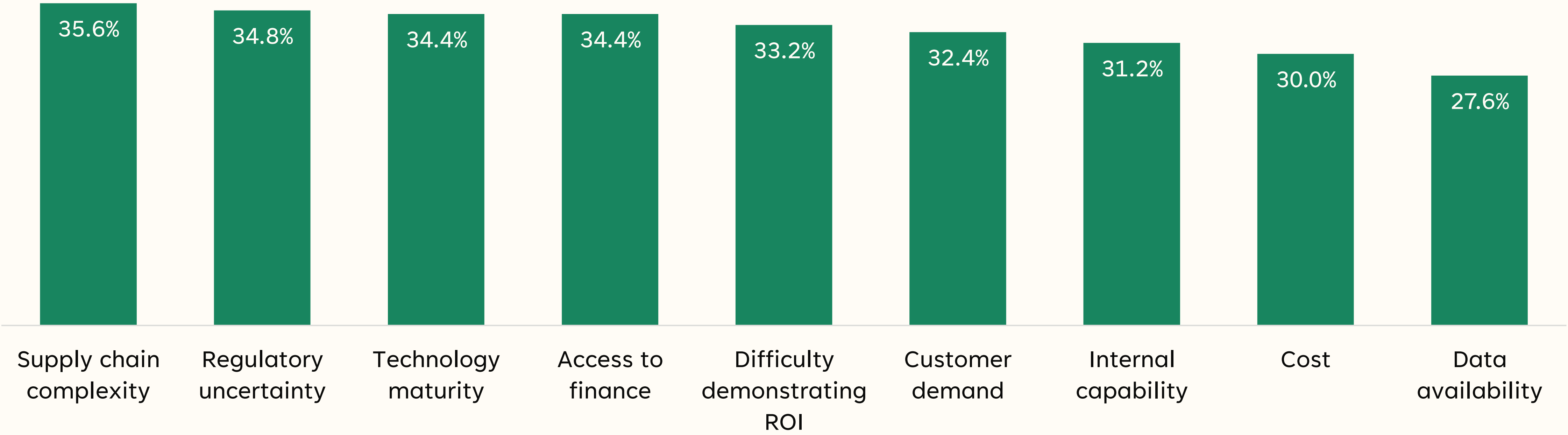


Source: Lumina Intelligence Climate Smart Resilience Questionnaire, July 2026

There is no silver bullet for climate-smart resilience

Barriers to climate-smart investment are evenly distributed across the entire business model, with no single obstacle explaining corporate inertia on its own. This feedback suggests that companies are paralysed and unsure of how and where to deploy capital for maximum impact. Regional context shapes which barriers feel most pressing. Regulatory uncertainty is cited as a top barrier by 41% of continental European respondents — compared with 28% in the UK and 27% in the US — consistent with the current weight of incoming EU sustainability legislation.

What are the biggest barriers to scaling climate-smart initiatives at your organisation?

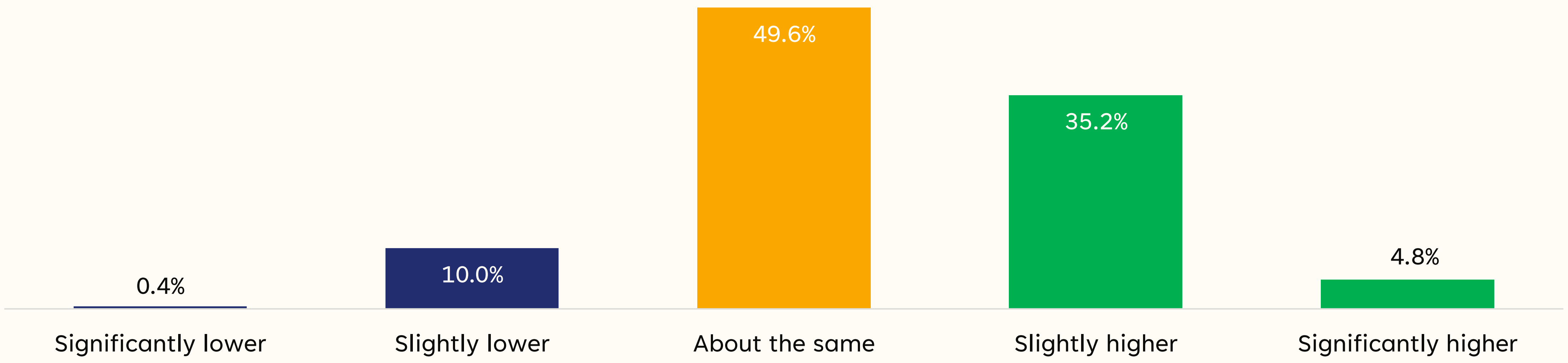


Source: Lumina Intelligence Climate Smart Resilience Questionnaire, July 2026

Investment is holding steady amidst increasing climate pressure — with clear pockets of momentum

Among those increasing their investments, momentum is concentrated. In China*, 53% of respondents report investing more — including 13% who are investing significantly more. Within Europe, Germany (52%) and Spain (48%) are the most active movers. Among organisation sizes, large firms with 5,000–9,999 employees are the most static: 62% report no change, and 26% are investing more. Amidst increasing physical risks, the question the data raises is what conditions would help more decision-makers move from holding steady to actively investing.

Compared to three years ago, your organisation's investment in climate-smart initiatives is...

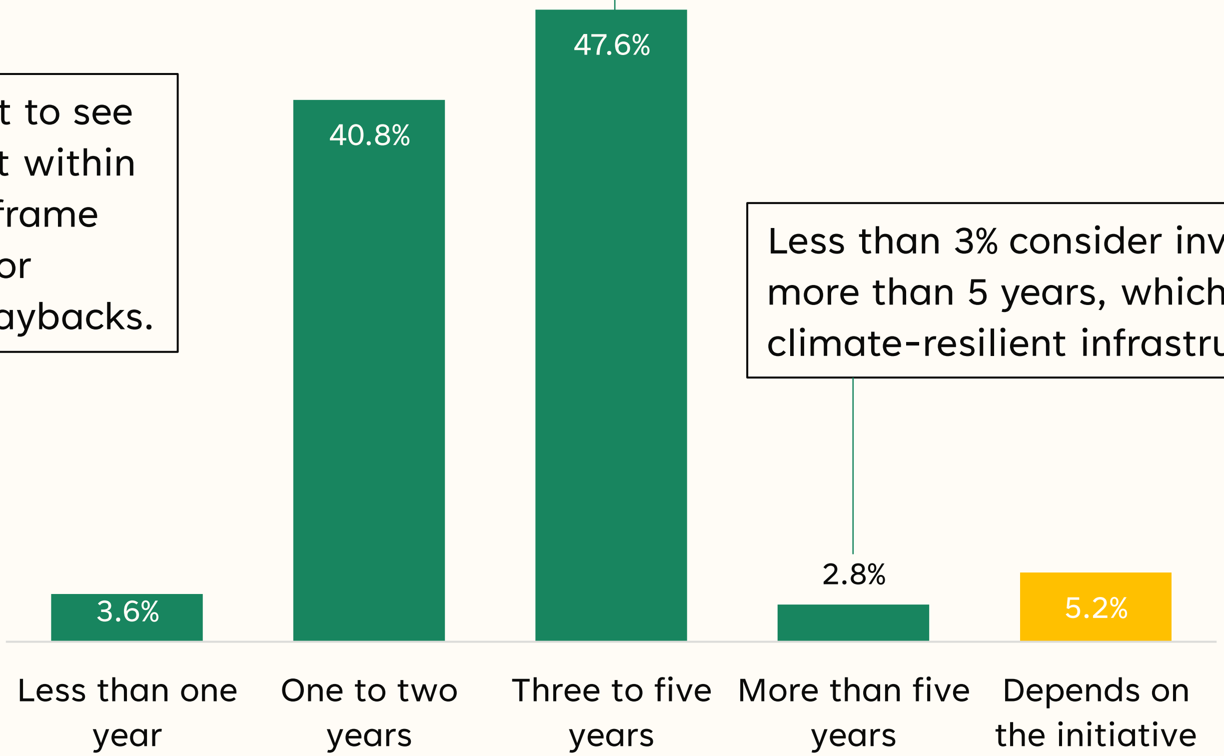


Source: Lumina Intelligence Climate Smart Resilience Questionnaire, July 2026. | *Note: n=30 for China

Short payback horizons limit capital commitment even further

Expected time for climate-smart investments to deliver measurable financial value

Over 90% of companies expect to see a return from climate-resilient within five years – a restrictive timeframe that limits the opportunities for initiatives with longer-term paybacks.



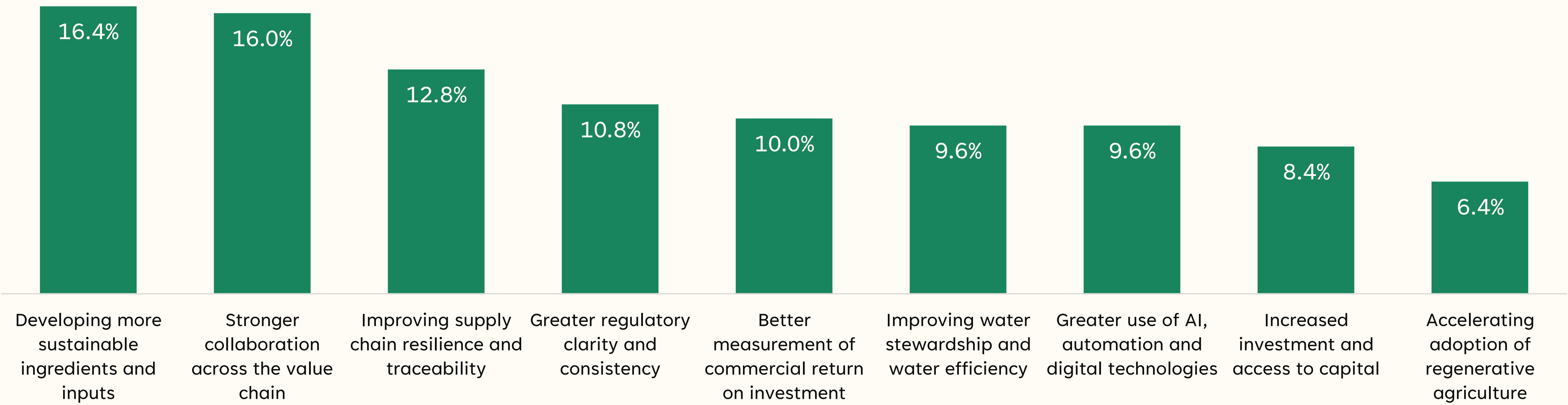
Less than 3% consider investments of more than 5 years, which include climate-resilient infrastructure.

Source: Lumina Intelligence 2026 Climate Smart Resilience Questionnaire, July 2026

Identifying the opportunities

When Lumina asked decision-makers to choose up to three areas where they saw there being most opportunity for improving climate resilience, there was no standout answer. From an optimistic perspective, this suggests that there will be multiple opportunities for those willing to take calculated risks.

Where decision-makers see the highest potential for improving climate resilience



Source: Lumina Intelligence Climate Smart Resilience Questionnaire, July 2026

Extended Table of Contents

Report Details

Format

Electronic PDF

Pricing

£950

Publication

September 2026

Access

Corporate Access

Methodology

Psychographic Survey

Lumina Intelligence surveyed 250 senior leaders and operational decision-makers from food, beverage, ingredient and FMCG manufacturing organisations across seven markets spanning North America, Europe and Asia (UK, US, China, France, Germany, Italy and Spain). The research was designed to capture perspectives on climate resilience from organisations of varying sizes and sectors, representing businesses with annual revenues ranging from under £50 million to over £10 billion.

Respondents were highly relevant to climate resilience strategy and investment decisions, with 90% reporting significant influence or decision-making authority within their organisations. Participants represented a broad cross-functional mix, with the strongest involvement in supply chain (58%), sustainability strategy (58%), procurement (52%), and operations (42%), supplemented by expertise in corporate strategy, ESG reporting, climate resilience, innovation, compliance, investment and communications.

- Sample profile = 250 respondents7 countries across North America, Europe and AsiaMix of Food (39%), Beverage (24%), Ingredient (20%) and FMCG (17%) manufacturers
- Organisations ranging from <£50m to >£10bn annual revenue90% hold significant influence or decision-making responsibility
- Functional representation across supply chain, sustainability, procurement, operations, strategy, ESG, climate resilience and innovation

Source: Lumina Intelligence, March 2026

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To learn more about how Lumina Intelligence can support you, please get in touch using the contact details provided below.

Get in touch

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