



The Food  
Foundation

# State of the Nation's Food Industry 2023

## Technical Report

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The Food Foundation

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## Standards and Transparency

### Metric 1. Businesses that report and set targets

#### Data source(s)

The Food Foundation's [Plating Up Progress Dashboard](#) and the Sustainable Restaurant Association's Food Made Good Standard.

#### Methodology

The Food Foundation's Plating Up Progress project annually assesses the progress of 29 UK-operating businesses within the food retail and food service industry across key themes relating to the transition to a healthy and sustainable food system. The 2023 Plating Up Progress analysis uses 20 metrics to assess food businesses transparency and disclosure across a range of food related health, environment and social issues. The analysis is based on information in the public domain, using existing benchmarks, corporate reports and websites.

For the State of the Nation's Food industry report, there is a focus on whether the company discloses data, and has set targets against the three healthy and sustainable metrics assessed in Plating Up Progress:

- 1) The percentage of sales from healthy foods
- 2) The percentage of sales from fruit and vegetables
- 3) The percentage of sale from animal-based proteins vs plant-based proteins

The full analysis from Plating Up progress and its methodology can be found [here](#).

For this year's SOFI report we excluded wholesalers and focused on the 27 food retail and service businesses assessed in PUP. This included 11 retailers, 5 caterers, 6 quick service restaurants and 5 casual dining restaurants.

### Metric 2. Board-level accountability for health and sustainability targets

#### Data source(s)

Access to Nutrition Initiative's (ATNI) [Retailer Index 2022](#)

#### Methodology

The Retailer Index consists of eight nutrition-related topics, which are based on the categories within ATNI's Global Index. Each of the 11 retailers was assessed on a total of 126 indicators, covering commitment, performance and disclosure across the topics. Together, the topics address governance; the production and placement of healthy, affordable, products; and how the retailers influence customer choices and behaviours, both online and in-store. Each topic is weighted according to the impact that it is considered to have on the diet of the retailers' customers across the UK.

ATNI sought engagement with all 11 retailers and use non-disclosure agreements, to ensure that the analysis and reporting is detailed, fair and representative.

### Metric 3. Power imbalances within the food industry

#### Data source(s)

## Executive vs shopfloor salaries

Data for the graph and table of executive pay (defined as the total pay banked for that year, including salary plus bonuses and other benefits) were found in the annual reports of the companies mentioned. These can be found via [High Pay Centre's Pay Database](#), [Companies House](#)'s register or on company websites.

Data for the shop floor worker pay was based on the UK shop floor pay rates as of April 2023, as reported by [RetailWeek](#). Shopfloor worker base pay is defined as total pay, not including bonuses – if available – or any other remuneration. RetailWeek collated the pay rate figures by asking the retailers directly for their standard rate of pay per hour for shopfloor workers.

These are reported as hourly figures, so annual salary figures were calculated based on the average number of hours per week (29.9) worked by retail workers from April to June 2023, according to the Office of National Statistics.

## Whole food sector vs whole economy - National Living Wage and Real Living Wage

The analysis of low pay, including the comparison of whole economy vs food sector Real Living Wage and National Minimum Wage rates in the UK in 2022, was based on data obtained from Resolution Foundation, and [their analysis](#) of the Annual Survey of Hours and Earnings 2012–2022 from the Office for National Statistics.

References to 'low pay' in this section refers to The Resolution Foundation's definition - the number and proportion of employees who are paid below two thirds of median hourly pay, at or below the National Minimum Wage, or below the Real Living Wage.

Definitions - taken from the [Living Wage Foundation](#), 2023:

- The Minimum Wage is the statutory minimum pay for under 21-23-year-olds. This is £10.18 across the UK, as of April 2023.
- The National Living Wage is the statutory minimum pay for over 23-year-olds. Across the UK it is currently £10.42, as of April 2023.
- The Real Living Wage is a voluntary wage rate based on the cost of living for 18+ workers. In October 2023 this was set at £12 across the UK and £13.15 in London.

## Methodology

### Executive vs shop floor salaries

A graph was created to show the difference between pay within companies at executive and shop floor levels. For each company, the pay gap between these levels was calculated as executive pay minus shopfloor pay, and the order displayed in the graph reflects this.

Due to differing financial year end dates, not all companies had released executive pay rates for 2023 at the time of writing. This prevented a fully comprehensive ranking, but previous years have been included to give an indication of the likely pay rates for executives for this year, and rankings were based on this.

### Whole food sector vs whole economy - National Living Wage and Real Living Wage

The chart shows a comparison of the percentage of workers in the UK in 2022 who were paid the National Living Wage or below, and the percentage of workers who were paid the Real Living Wage. This is split between the whole food sector vs the whole economy. It shows the whole economy as having 13.4% of workers paid below the Real Living Wage, and 6% of workers paid the National Minimum Wage or below. For the whole food sector, 36.4% of workers from across the whole economy were paid below the Real Living Wage, and 14.4% were paid the National Minimum Wage or below.

## Affordability

### Metric 1. Support for households during the cost of living crisis

#### Data source(s)

Kids Food Guarantee, The Food Foundation.

The Kid's Food Guarantee is a set of actions which The Food Foundation think supermarkets should have in place as a minimum in order to effectively tackle rising levels of food insecurity. These are actions that citizens have told us they are eager to see, and which align with existing areas of focus for food retailers.

To monitor retailer progress against our guarantee areas we worked with Questionmark Foundation, an international non-profit think tank. Data was collected between July and August 2023 for those guarantee areas based on QuestionMark data. For other guarantee areas the Food Foundation collected the data. For all Guarantee areas online price and product information on the food categories within scope was collected from supermarket websites for analysis.

#### Methodology

##### First Infant formula

We selected six standard first infant formula milk products sold in the UK at the major supermarkets. Manufacturers for each are listed in brackets. These are; Aptamil 1 First Infant Milk From Birth (Danone), Cow & Gate 1 First Milk Powder (Danone), HiPP Organic Infant Milk (HiPP), Kendamil First Infant Milk Stage 1 (Kendal Nutricare), Mamia First Infant Milk (Aldi), and SMA Little Steps First Milk 1 From Birth (Nestle). We then found the price of these brands as listed online at each of the nine major UK retailers: Aldi, Asda, Co-op, Iceland, Morrisons, Ocado, Sainsbury's, Tesco, and Waitrose.

For families looking for the best offers available, in-store prices can be lower than the price of equivalent products online, but in order to compare like for like we have used online prices.

We excluded pharmacies, such as Boots and Superdrug, from our search as the Kids Food Guarantee is focussed on food retailers and manufacturers. The majority of retailers store three or more of the above-mentioned brands. Aldi is the exception with its own-brand Mamia First Infant Milk formula, and does not store any other branded products that we could find. As powdered infant formula is the cheapest format available and is the most widely used (as opposed to liquid ready-to-feed infant formula and formula tablets), we focus on this in this analysis in line with First Steps Nutrition's [analysis](#) of formula. This is first stage infant formula made with cows' milk, and we excluded hungry baby, anti-reflux, lactose free or comfort milks. More expensive goat milks are also excluded.

The listed products above are the cheapest product in each range (with the exception of Mamia which is not in a range) as many formula brand also sell a premium and an organic version at a higher price point even though all first infant milk formulas are required to meet the same regulations.

The data was first collected on 5<sup>th</sup> June 2023, and subsequently captured on the 5<sup>th</sup> of every month. Data was exported into an excel spreadsheet and was analysed based on the price/weight of the product and retailer.

The price of the larger tins (typically containing 800-900g of formula) provides a more realistic reflection of shopping behaviour, as consumers do not buy formula in 100g portions.

## Yogurt

For this Guarantee area we worked with Questionmark Foundation to look at available yogurts and their price and nutritional information as available online for five of the major UK retailers: Aldi, ASDA, Morrison's, Sainsbury's and Tesco. We looked at yogurt pots containing roughly a single portion; all yogurts with a packaged portion size of 200g or less. Packaged single portion pots were selected to provide a more realistic reflection of how citizens shop and snack (i.e. you can't buy 100g of yogurt, you buy the pot). Larger pots also come with a higher upfront cost. We looked at single portion pots sold separately and as part of a multipack.

We included both plain and flavoured yogurts, with and without children's figures on the packaging, and both animal-based and plant-based products.

Specifically excluded were cheesecake desserts and yogurt drinks (e.g. in pouches).

To assess the nutrition profile of the yogurts in scope we looked at the sugar content of yogurt per 100g. The Nutrition Profiling Model (NPM), takes a broader range of nutrients into account in order to calculate a score, and marks down products that are high in fat. Given that fat is a key nutrient for young children and that many dairy products are naturally high in fat we focused on the sugar content.

We used the upper limit of total daily (free) sugar intake recommended for children as our guide for assessing sugar levels. For children aged 7-10 this is 24g, equivalent to 6 cubes of sugar. For children aged 4-6 it is 19g, equivalent to 5 cubes of sugar.

The UK [government recommends](#) that free sugars – sugars added to food or drinks, and sugars found naturally in honey, syrups, and unsweetened fruit and vegetable juices, smoothies and purées – should not make up more than 5% of the energy (calories) you get from food and drink each day.

This means:

- Adults should have no more than 30g of free sugars a day, (roughly equivalent to 7 sugar cubes).
- Children aged 7 to 10 should have no more than 24g of free sugars a day (6 sugar cubes).
- Children aged 4 to 6 should have no more than 19g of free sugars a day (5 sugar cubes).
- There's no guideline limit for children under the age of 4, but it's recommended they avoid sugar-sweetened drinks and food with sugar added to it.

4g of sugar is equivalent to a teaspoon or cube of sugar, with the first [3.8g of sugar](#) (roughly 1 cube) contained in each yogurt derived from naturally occurring milk sugars found in dairy products.

Although sugar in whole fruit is not considered a health risk, the process of pureeing releases the sugars from their cells. These 'free sugars' are more harmful than in the whole fruit form and can contribute to tooth decay. Fruit purees or fruit juice from concentrate when added to yogurt are therefore considered to be added, or free sugars.

Data were exported into an excel spreadsheet and analysed on the basis of total sugar content and price per single portion pot. Where yogurts were on offer, the promotional price was taken as the price.

Our method was as follows: To find the cheapest yogurts, we ranked single packaged yoghurt pots by price and

by retailer, and then selected the cheapest product for each retailer.

To find the highest sugar options available for <£1, we ranked single packaged yogurt by sugar content (high to low) and by retailer and selected the first product which was <£1.

For analysis of the April dataset, we used the following methodology to identify those yogurts that were low cost and low sugar: We ranked single yogurt pots by sugar content (low to high) and by retailer, and then selected the first product which was <£1.

For analysis of July and August's datasets we improved our methodology for identifying low cost and low sugar yogurt options in order to place a greater emphasis on price over sugar content. We therefore used the following methodology: We ranked single yogurt pots by price (low to high) and by retailer, and then selected the first product which contained less than 5g of sugar per 100g. We used the same methodology on April's dataset to ensure we were comparing like with like in September's update report.

### Cereal

To monitor this Guarantee area we worked with [Questionmark Foundation](#), to look at available cereals, their price, and nutritional information for the largest five major UK retailers: Aldi, ASDA, Morrisons, Sainsbury's and Tesco. We looked at all dry, 'ready to eat' cereals available across the retailers. We excluded cereals that require heating in acknowledgement of the barriers to food preparation that low income families can face, such as fuel poverty and accessing kitchen appliances ([ref](#)).

We used broad inclusion criteria to accurately reflect the range of cereals available in retailers. We included both those with and without children's figures on the packaging. We excluded cereal sold in single serve pots as these mostly required heating or are typically targeted towards adult commuters. Our final sample included 830 cereals in total, and 476 cereals when duplicate brands (i.e. the same product) sold across multiple retailers were removed. We excluded 14 cereals sold in boxes over 1kg in size as these come with a higher upfront cost to consumers.

We assessed price and nutrition per 100g given the wide variety of box sizes available when buying cereal, but a portion size of cereal for children is likely to be less than this. The majority of cereal products use 30g as a recommended serving size for adults, but there is [disagreement](#) as to how realistic this is of typical serving sizes and children may be eating a wide range of portion sizes. The British Nutrition Foundation suggest 3-6 tbsps of cereal as an appropriate [portion size](#) for children aged 1-4 years old, which roughly equates to 45-90g.

We used the Government's Nutrition Profiling Model to assess the healthiness of cereals. Using this criteria foods scoring 4 or more points are classified as high in sugar, salt and/or fat (HFSS). For all products, the NPM score (Department of Health 2011) was computed based on nutrients and, if needed, category averages (fruits, nuts, vegetables and pulses, as well as fibres).

As many cereals are high in sugar we also looked at the sugar content per 100g. We used the upper limit of total daily (free) sugar intake recommended for children as our guide for assessing sugar levels. For children aged 7-10 this is 24g, equivalent to 6 cubes of sugar. For children aged 4-6 it is 19g, equivalent to 5 cubes of sugar.

The UK [government recommends](#) that free sugars – sugars added to food or drinks, and sugars found naturally in honey, syrups, and unsweetened fruit and vegetable juices, smoothies and purées – should not make up more than 5% of the energy (calories) you get from food and drink each day.

This means:

- Adults should have no more than 30g of free sugars a day, (roughly equivalent to 7 sugar cubes).
- Children aged 7 to 10 should have no more than 24g of free sugars a day (6 sugar cubes).
- Children aged 4 to 6 should have no more than 19g of free sugars a day (5 sugar cubes).
- There's no guideline limit for children under the age of 4, but it's recommended they avoid sugar-sweetened drinks and food with sugar added to it.

To look at whether cereals could be categorized as marketed towards children or not, we defined these as products with images on the packaging that are designed to appeal to children (e.g. animals, cartoon characters, UFOs and fireworks).

### **Multibuys**

To monitor this Guarantee area we worked with [Questionmark Foundation](#), an international non-profit think tank, to look at what type of foods are included as part of multibuy promotions. We looked at food promotions available across the five largest UK retailers; Aldi, ASDA, Morrisons, Sainsbury's and Tesco. Promotions were all volume promotions, for example "buy one get one free" (BOGOF) deals where customers benefit if more than one item (of the same) product is bought. Sainsbury's and Aldi run price reduction promotions online but do not offer volume promotions or multibuys on food. Volume promotions or multibuy deals were found at three retailers, ASDA, Morrisons and Tesco.

We looked at whether such offers were on High Fat, Salt, Sugar (HFSS) foods, staple carbohydrate products, and other healthy essentials such as fruit and veg. Staple carbohydrate foods were defined as plain carbohydrates in their simplest form, including rice, pasta, grains, potatoes, lentils, beans (including dried and tinned), and loaves of bread (excluding rolls and pitta breads etc). The Government's [Eatwell Guide](#) recommends that 38% of our diets consist of starchy carbohydrates such as bread and rice, 40% from fruit and veg, and 12% from beans, pulses and other animal protein. HFSS foods are recommended only to be consumed infrequently and in small amounts. For children aged under 4, it is [recommended](#) that 50% of their daily energy intake come from carbohydrate, and that .

Vitamins, medicines, and other non-food products were excluded. Alcohol was excluded where we looked at the types of foods on offer and how healthy or unhealthy they are. Non-alcoholic drinks were included in the nutrition profiling analysis.

The category 'Other' includes those products where nutrient information is missing online, which makes it difficult to calculate an (accurate) NPM score and determine whether the product is HFSS or not. The non HFSS category includes a wide range of foods with an NPM score of less than 4, including tea and coffee, herbs and spices, composite foods, as well as some healthier foods such as fruit, veg and milk.

We used the Government's [Nutrition Profiling Model](#) to assess the healthiness of offers. Using this criteria foods scoring 4 or more points, and drinks scoring 1 or more points, are classified as high in sugar, salt and/or fat (HFSS).

Note that this definition of HFSS, as defined by the Government's Nutrition Profiling Model, differs from the government's [definition of foods within scope](#) for the restriction of location based and volume promotion of HFSS foods. For example, unless battered or breaded, red and processed meats are excluded from the definition of HFSS food as part of the restriction of location based promotions for HFSS foods.



## Lunchboxes

The Food foundation conducted some light touch research into how much a reasonably healthy packed lunch currently costs from the five retailers with the biggest share of the market.

These food items have been taken as indicative items that can form part of a healthy packed lunch and are not an exhaustive list. We have chosen these items to gain a balance between a nutritious lunch and one which children may realistically eat (although of course all children have individual preferences!) as it's important for low income families to provide food that their children will not reject so it doesn't go to waste. Portion sizes would need to vary depending on the child's age but this lunch is likely suitable for an older child, or a younger child including snacks eaten over the course of the school day. We have looked at the cost of the lunch across the five retailers with the biggest share of the market.

## Method details

- Products were available online from retailers websites.
- Multibuys were not included, single promotions were included.
- The closest comparable product between retailers was selected.
- The price given is for the proportion of the product needed for the portion sizes given, not the full cost of the item.
- The full list of products analysed from each retailer is available here.

## Metric 2. Promotions and offers

### Data source(s)

[Kids Food Guarantee](#), Questionmark Foundation

### Methodology

As part of the Kids Food Guarantee, we worked with the Questionmark Foundation to look at what type of foods are included as part of multibuy promotions. Data was collected for the period 19th to 26th July 2023 and looked at multibuy offers available across three of the largest UK supermarkets (Asda, Morrisons, and Tesco). See above for further detail on the methodology used to assess multibuys across the major retailers.

We categorised offers into the following areas to determine what proportion of volume promotions are on healthier and more sustainable foods:

- Meat and Dairy
- HFSS food (excluding meat and dairy)
- Fruit and Veg
- Non-HFSS food (including staple carbs, excluding meat and dairy)
- Non-alcoholic drink
- Non-scoreable products

## Metric 3. The cost of more sustainable alternatives to meat and dairy

### 1. Chicken

### Data source(s)

Data for comparison among chicken products (plain chicken breast and coated chicken pieces), plant-based chicken alternatives (plain and coated) and chickpea products were obtained from major UK retailers. The price and nutritional content of all products in these categories sold online from Aldi, Tesco and Waitrose were collected in March-April 2023.

Where available, information was recorded on both a per 100g and per serving size basis. Data on the environmental impact of each product group were sourced from a combination of relevant databases because greenhouse gas emissions (GHGE) data at a product level are limited. The majority of GHGE data estimates were sourced from Open Food Facts, and complemented with data from a forthcoming LSHTM systematic review, Our World in Data, and Mike Berners-Lee's UK carbon data charts.

### Methodology

A database containing relevant chicken, plant-based chicken alternative, and chickpea products from each retailer was created. Information included: the product group, retailer, brand, fresh/frozen, packet price, packet weight, and serving size.

Nutritional information collected included: energy (kcal), saturated fat (g), sugar (g), fibre (g), protein (g), and salt (g). Where the same product was sold across more than one retailer, the average price was calculated and recorded in the final database.

Retailers were selected to represent a range of price points in the UK supermarket sector - Aldi as the cheapest, Waitrose as the most expensive, and Tesco which falls in the middle but is the supermarket with the largest market share (Kantar, May 2023).

To distinguish between the wide variety of processing methods used in chicken and plant-based chicken alternatives, we grouped products into two different categories.

1. Plain chicken breast (meat and plant-based alternatives), and;
2. Coated chicken pieces - including nuggets, dippers, "popcorn", breaded or fried fillets/strips/pieces - (meat and plant-based alternatives).

As plant-based chicken alternatives can be highly processed, we also looked at the price, nutritional content, and environmental impact of chickpeas (ready-to-use/canned) as a less processed meat alternative.

From the final database, the mean price and nutrient content of each product category was calculated per 100g. Results were presented per 100g for consistency, and because many plant-based chicken alternative products suggest smaller serving sizes than their meat equivalents. Sample sizes for the nutrient and price calculations were considerably larger than for the GHGE data, despite combining a variety of data sources for the latter. This is because environmental impact estimates at a product level are currently much more limited than nutrient data, which are provided on all products. The more limited environmental data means that it is currently typical in the scientific literature to rely on very few, sometimes just one, estimates of impacts per product rather than a range.

## 2. Milk

### Data source(s)

The price (per litre) and nutritional content (per 100ml) of all almond, oat, rice and soya plant-based milk alternatives (PBMA) sold online from Aldi, Tesco and Waitrose were collected in May 2022.

The per-litre price of semi-skimmed cows' milk sold in 2-pint bottles was also collected from these retailers. This bottle size was chosen because it is closest to the container size in which PBMA's are often sold (1 litre). The nutritional content of cows' milk was obtained from the McCance and Widdowson's 'composition of integrated foods dataset'. This provides the nutrient content of the UK food supply. Data on the environmental impact of dairy milk and each plant-based alternative was sourced from the peer-reviewed publication "Poore, J., & Nemecek, T. (2018). Reducing food's environmental impacts through producers and consumers. Science" – which can be found here.

### Methodology

A database containing cows' milk and PBMA's (almond, oat, rice and soya) from each retailer was created. Information included: type of milk/plant-based alternative, retailer, brand/own brand, price (£/litre), sweetened/unsweetened, fortified/unfortified, organic/inorganic, fresh/UHT.

Nutritional information collected included: energy (kcal), fat (g), saturated fat (g), sugar (g), fibre (g), protein (g), salt (g), vitamin D ( $\mu\text{g}$ ), vitamin B12 ( $\mu\text{g}$ ), vitamin B2 ( $\mu\text{g}$ ), calcium (mg), iron (mg), iodine ( $\mu\text{g}$ ), zinc (mg) and potassium (mg).

Where the same product was sold across more than one retailer, the average price was calculated and recorded in the final database. Retailers were selected to represent a range of price points in the UK supermarket sector - Aldi as the cheapest, Waitrose as the most expensive, and Tesco which falls in the middle but is the supermarket with the largest market share (June, 2022).

From the final database, the average price of each type of milk/PBMA (cow, almond, oat, rice and soya) was then calculated per litre, and the average nutrient content of each type of PBMA was calculated per 100ml.

## Availability

### Metric 1. Healthy Menus

#### Data source(s)

Menu Tracker is a large dataset which includes data from the menus of 84 major restaurants in the UK, including casual dining and quick service establishments such as cafes, restaurants, pubs, cinema chains and takeaways. Details of the inclusion criteria for businesses can be found in this [2022 paper](#).

#### Methodology

The dataset provided by Menu Tracker consisted of 84 out of home companies nutritional content of all of the menu items. For each company, items were classified as 'main meals' (including breakfast, lunch or dinner) and other items were excluded (such as sides, sharing items, desserts, drinks and snacks). The number of menu items which were over half of the recommended daily intake of calories, saturated fat, sugar and salt were counted and percentages were calculated against the number of main meals available per company.

An average of the recommended daily intake for men and women were calculated as below.

	Average recommended daily intake	50% over the recommended daily intake
Calorie (Kcal)	2250	1125
Saturated fat	27.5	15
Sugar	30	13.75
Salt	6	3

Of the 84 companies, 30 were excluded from the analysis due to the reasons below.

Companies	Reason for exclusion
Asda	No data on sugar/salt/fat/saturated fat
Ask	No data on sugar/salt/fat/sat fat
Barburrito	All individual ingredients
Ben & Jerrys	No main meal, only ice cream
Bills	No data on sugar/salt/fat/saturated fat
Birds Bakery	Only available per 100g not per meal
Boost Juice	No main meals only drinks
Chef and Brewer	No data on sugar/salt/fat/saturated fat
Chicken Cottage	No data on sugar/salt/fat/saturated fat
Cineworld	No main meals
Coco Di Mama	No data on sugar/salt/fat/saturated fat
Cookhouse & Pub	No data on sugar/salt/fat/saturated fat
Costa Coffee	No main meals, only drinks
Five Guys	not the full menu
Loch Fyne	No data on sugar/salt/fat/saturated fat
Krispy Kreme	No main meals
Papa John's	No data on sugar/salt/fat/saturated fat

Paul	No main meals
Pho	Salt data missing
Pizza Express	Nutrition data not available for all main meals
Pizza Hut	Nutrition data appears to be per slice vs whole individual pizza
Revolution Vodka Bars	Salt data missing
Sainsburys	No data on sugar/salt/fat/saturated fat
Tesco Cafe	No data on sugar/salt/fat/saturated fat
The Cornish Bakery	n/a cakes/pastries
The Real Greek	n/a as it's all platters/sharing
Thomas the Baker	n/a as it's all platters/sharing
Vue Entertainment	No main meals
Wasabi	Only available per 100g not per meal
YO! Sushi	Small plates only
Zizzi	No data on sugar/salt/fat/saturated fat

## Metric 2. Meaty menus

### Data source(s)

Data included this section was taken from the following sources:

- Net Zero Now
- World Resource Institute's (WRI) '[CoolFood Pledge](#)'- an initiative where food-service providers commit to reducing food-related emissions by 25% by 2030.
- Menu Tracker - a large dataset provided which included data from the menus of 84 major restaurants in the UK, including casual dining and quick service establishments such as cafes, restaurants, pubs, cinema chains and takeaways. Details of the inclusion criteria for businesses can be found in this [2022 paper](#).

### Methodology

#### Meat vs meatless

From the dataset provided, the offerings on each company's menu classified as 'main meals' (including breakfast, lunch and dinner) were counted, and all other menu items (such as sides, sharing items, desserts, drinks and snacks) were discounted. For each company, the main meals were then labelled as containing meat or containing no meat, or as containing fish. They were then counted accordingly, the percentages of each were calculated and the tables showing the ranking of companies' percentage of meat main dishes and those with the highest percentage of meatless dishes were created. The percentage of fish dishes was not displayed in the report as this section focused specifically on meat/meatless ratios.

Of the 84 total restaurants, 71 were counted and 13 were excluded from the analysis due to the reasons provided below.

<b>Companies</b>	<b>Reason for exclusion</b>
Barburrito	All individual ingredients
Ben & Jerry's	No main meals, only ice cream
Boost Juice bars	No main meals, only drinks
Costa Coffee	No main meals, only drinks
Five Guys	Not the full menu
Krispy Kreme	No main meals, only donuts
Paul	No main meals
The Cornish Bakery	No main meals, only cakes/pastries
The Real Greek	No main meals
Thomas the Baker	No main meals
Tortilla	No main meals
Vue Entertainment	No main meals
YO! Sushi	No main meals, only small plates

## Appeal

### Metric 1. Advertising and promotion of healthier/plant foods

#### Data source(s)

Nielsen Ad Intel

#### Methodology

Nielsen measures advertising expenditure across all traditional media channels. Nielsen's advertising expenditure is used by advertisers and networks to shape the buying and selling of advertising. Digital advertising is monitored but due to the complexities of buying this medium Nielsen have decided not to include.

Nielsen ran a report for the calendar year 01 January 2022 to 31 December 2022. This included data on advertising spend across seven different media channels (cinema, direct mail, door drops, outdoor, press, radio and TV) for the 222 minor product categories which are included within the 'food' and 'drink' major product categories.

Minor product categories were allocated to one of the following groups (with the exception of a small number of excluded categories – see below):

- Brand advertising (not on a specific product or category of food)
- Desserts
- Snacks
- Confectionary
- Soft drinks
- Fruit and vegetables
- Carbohydrates
- Condiments
- Cereals
- Convenience foods
- Ready meals
- Meat and fish
- Dairy and alternatives
- Water, tea and coffee
- Other

This categories which were excluded from the analysis were those relating to alcoholic drinks and baby foods. The total advertising spend in sterling and percentage (%) spend was then calculated per grouping.

### Metric 2. Promotion of unhealthy meals on delivery apps

#### Data source/s

[Keeble et al](#)

[Hetz et al](#)

#### Methodology

This metric draws on the academic research carried out by Hetz et al at the World Health Organisation, and Keeble et al from Cambridge University.

Keeble et al used data from postcode districts in England. They identified and described the number of food outlets and unique cuisine types accessible online from JustEat and investigated associations with area-level deprivation using adjusted negative binomial regression models. They also compared the number of food outlets accessible online with the number physically accessible in the neighbourhood and investigated associations with deprivation using an adjusted general linear model. For each outcome, they predicted means and 95% confidence intervals. The full methodology and more findings can be found in their paper ['Socioeconomic inequalities in food outlet access through an online food delivery service in England: A cross-sectional descriptive analysis'](#)





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