

THE STATE OF THE NATION'S FOOD INDUSTRY

2023

Which retailers and Out of Home businesses are leading the way in supporting a shift towards more healthy and sustainable diets?



The Food
Foundation

ABOUT THE FOOD FOUNDATION



The Food Foundation is an independent charity working to address challenges in the food system in the interests of the UK public.

Working at the interface between academia and policymakers (parliamentarians, civil servants, local authorities, business leaders) we use a wide range of approaches to make change happen including events, publications, media stories, social media campaigns and multi-stakeholder partnerships. We also receive extensive direct input from the public to ensure their lived experience is reflected in our policy proposals. We collaborate with many partners on a range of different thematic areas, liaising with academics to generate evidence and campaigners who can drive change. We are independent of all political parties and businesses, and are not limited by a single issue or special interest.

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Introduction

Never before has what we eat been so important. Our current diets are driving both health and environmental crises. The increasing frequency and scale of extreme weather events in recent years has been a stark reminder that our climate is changing, and at a faster rate than scientists have previously predicted. Ice sheets in the West Antarctic are now melting 'irreversibly' (Dance *et al.*, 2023) and the hottest month in 120,000 years this summer forced an increasingly despairing UN Secretary-General, António Guterres, to declare the arrival of the era of "global boiling" (Niranjan, 2023). With the global food system accounting for 42% of global greenhouse gas emissions (GHGEs) of which livestock farming is a major contributor (IPCC, 2022), it will not be possible to keep global warming within 1.5°C without tackling food system-related emissions.

With a quarter of people in the UK now living with obesity and 38% with overweight (National Health Service, 2019), and with levels of diet-related disease such as type 2 diabetes increasing, we are also sleepwalking into a health crisis that will have significant economic repercussions. For example, the full cost of obesity in 2022 in the UK is an estimated £65 billion (Griffiths, 2023), which accounts for costs to the National Health Service (NHS) and the cost of social care, lost productivity, and workforce inactivity (Frontier Economics, 2022).

Changing our diets, so they are healthier and more sustainable, therefore poses a significant opportunity for reducing GHGEs as well as improving the population's health.

FOOD BUSINESSES PLAY A MAJOR ROLE IN DETERMINING OUR DIETS

Food companies shape our food environment and, whether we are conscious of it or not, play a big part in determining our food choices. They set the price and shape the availability and appeal of food, which then impacts on what we choose to buy and eat. Increasing the visibility of products in a retail environment by



featuring them at the ends of aisles, for example, leads to an increase in sales of those products (Hawkes, 2009). Findings in this report also show there is a positive correlation between availability and sales of vegetarian and vegan meals in restaurants. As we race towards 2050, the year in which the UK government has legally committed to reaching Net Zero, there is increasing emphasis on the role food businesses will need to play in helping us reach our emissions reduction targets. Businesses have been under increasing scrutiny (Evans *et al.*, 2022) to show what steps they're taking to tackle the climate crisis, and some have been criticised for greenwashing.

Both retail and the Out of Home (OOH) sectors act as gatekeepers between upstream businesses – such as manufacturers and producers – and citizens. In doing so, they play a crucial role in shaping our food environment. Given how significant this role is, this report focuses on these businesses, assessing what progress they are making in helping us access a more sustainable and healthy diet. Both sectors have a responsibility to create food environments that ensure healthy and sustainable food is affordable, readily available, and appealing.

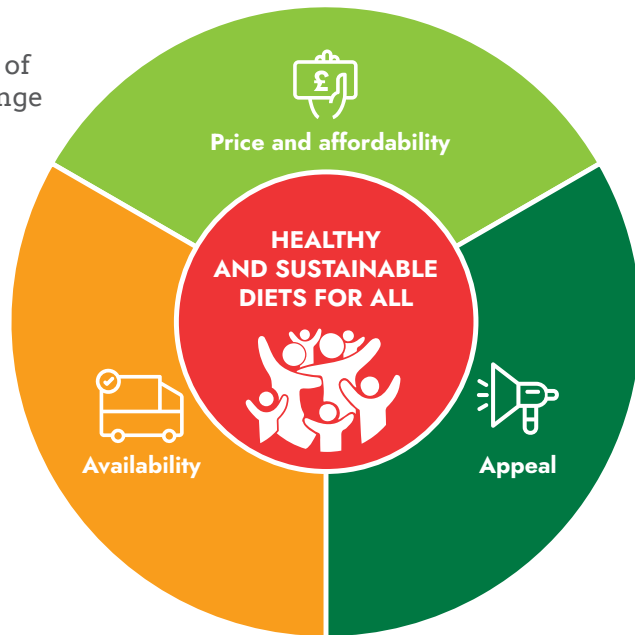
Whilst this year's report focuses mostly on these two sectors, there is an increasing need for manufacturers to better support healthy and sustainable diets, such as ensuring that plant-based alternatives have good nutrition profiles, or committing to not create packaging for unhealthy foods that appeal to children.

WHAT DOES 'GOOD' LOOK LIKE?

To shift the dial on diets, businesses must have **standards** in place that enable them to be more transparent and disclose the proportion of sales that come from healthier and more sustainable foods. For example, by reporting on sales of HFSS (high in fat, salt, or sugar) foods, fruit and vegetables, and types of protein by source (animal versus plant), as well as setting SMART targets for reducing or increasing sales of these types of foods. Board-level accountability for the targets that are being set is also key in ensuring they are met.

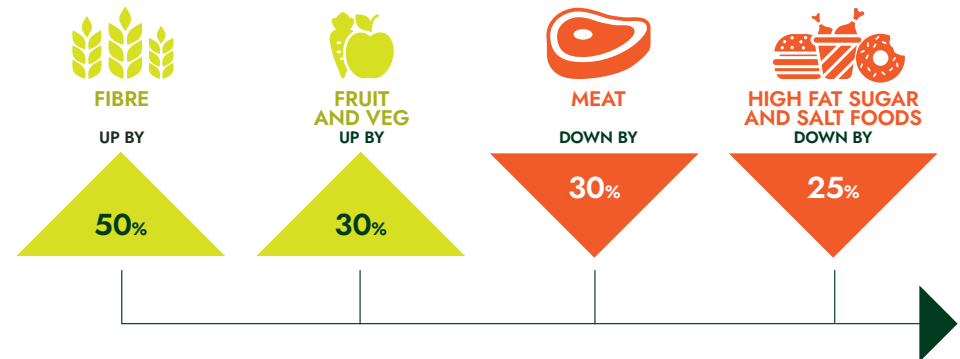
To meet these targets, businesses also need to ensure that sustainable and healthy food is **affordable** – cheaper than unhealthy and unsustainable food; is more readily **available** – within meals and products, on menus and on shelves; and **appeals** to the citizen through marketing tactics and product development.

FIGURE 1
Key drivers of dietary change



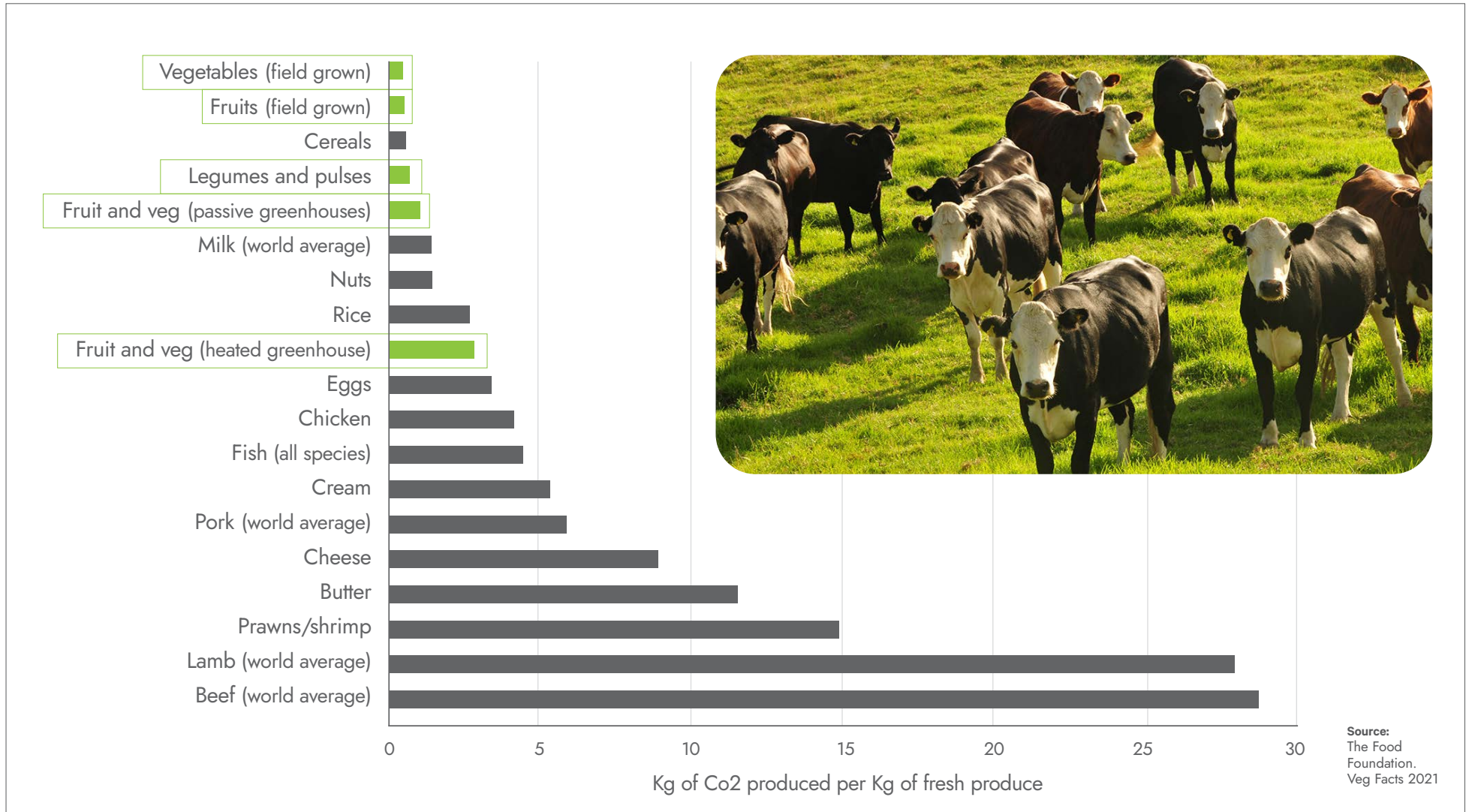
Broadly speaking, a healthy and sustainable diet is one that contains less meat and smaller amounts of foods high in salt, sugar and fat than we are currently eating, and is rich in plant foods such as vegetables and pulses. More specifically, people within the UK need to:

FIGURE 2
Aim for a healthy and sustainable diet



Meat production has much higher resource requirements than plant-based foods and is a major contributor to GHGEs (see **Figure 3**). Raising livestock takes up nearly 80% of the world's agricultural land yet produces less than 20% of the world's supply of calories (Ritchie, 2017). With the health benefits of diets lower in red and processed meat and higher in fruit, vegetables and pulses well documented (NHS, 2022; British Nutrition Foundation, 2021), the potential co-benefits of being able to improve health whilst simultaneously reducing our impact on the environment are significant.

FIGURE 3 The mean amount of CO₂ produced per kg of fresh produce for different food categories



At a glance – key findings

STANDARDS

- No major UK food retail or service business has a target for and discloses the % of sales coming from both animal and plant proteins.
- Power and pay imbalances are widespread in the food sector. The greatest pay gap between CEO and shopfloor workers is Sainsbury's, with a gap of £4.8m. Lidl has the lowest pay gap of £837,000.
- A quarter of food sector workers experienced food insecurity in January 2023.



AVAILABILITY

- More than half of the restaurants assessed have more than half their main dishes exceeding 50% of the Recommended Daily Intake for salt.
- Pubs are the unhealthiest subsector, with Walkabout, Sizzling Pub, Flaming Grill Pub Co, Brewhouse and Ember Inns serving the largest number of main meals that are regularly exceeding 50% of the RDI for calories, saturated fat, salt and sugar.
- 62% of main meals offered by major UK restaurants contain meat, whereas only 32% were meatless.
- Meat and dairy can contribute half of a pub's entire carbon footprint.



AFFORDABILITY

- Plant-based chicken alternatives are on average 27% more expensive than a chicken breast.
- Between March 2021 (before food prices started to rise) and April 2023, first infant milk formulas increased in cost by an average of 24%, with some brands seeing a much higher rate of inflation of up to 45%
- Over a quarter (27.3%) of multibuy deals are on HFSS food and drink, compared to just 4.5% of multibuy deals on fruit and vegetables and 4.2% on staple carbohydrates.
- 21% of multibuy offers are on meat and dairy foods compared to 4.5% on fruit and vegetables.



APPEAL

- Less than 1% of advertising spend goes towards fruit and vegetables and 0.8% on plant based dairy alternatives, compared to 9% on animal foods, and a third (33%) going toward advertising of discretionary foods such as confectionary and snacks
- The number of food outlets people can order from using online meal delivery apps was 50% greater in the most deprived postcode districts in England, compared to the least deprived.



This year's *State of the Nation's Food Industry* report finds that business progress towards a better food system has slowed, with fewer commitments to healthy and sustainable diets being set in comparison to last year.

Across both retail and OOH sectors there has been an overall decrease in business transparency for the three key metrics assessed by The Food Foundation, with the OOH sector performing worse than retailers on setting targets and disclosing data for sales of both HFSS foods and fruit and vegetables. But most starkly, of the 27 largest retailers and OOH sector companies assessed, none have a target for and disclose sales of protein by source (animal and plant). There have been several external factors this year which may have impeded business progress. The knock-on effects of both geopolitical turbulence and extreme weather driven by the climate crisis have resulted in supply issues and rising input costs for businesses on fertilisers and key ingredients such as vegetable oil (The Food Foundation, 2023a). This has pushed health and sustainability down the agenda.

With high input costs driving record levels of food price inflation, citizens have seen the price of their weekly food shop skyrocket, a contributing factor in pushing 9 million adults (17% of households) into food insecurity as of June (The Food Foundation, 2023b). Rising food prices have exacerbated the difficulties many people face in being able to eat healthily and sustainably; healthy food is twice as expensive as unhealthy food per calorie (The Food Foundation, 2022), and the cost of sustainable alternatives to meat and dairy remains high. As news of

high supermarket profits hit the headlines, accusations of profiteering were levelled at retailers (Inman, 2023). Although the Competition and Markets Authority's (CMA) findings have dispelled claims of business profiteering (CMA, 2023), trust in the UK supermarkets among citizens is in danger of being eroded.

The absence of government action and unwillingness to intervene in the food system is also impeding business progress by failing to provide a level playing field. The UK is sorely lacking a clear direction of travel for its food system and the businesses within it.

THE GOVERNMENT TOO MUST PLAY A ROLE IN SETTING THE PARAMETERS FOR BUSINESSES TO OPERATE IN

While more action from food businesses is absolutely needed, big shifts in the food environment can only be achieved by shifting the incentives and standards in the system within which businesses operate. The government is responsible for changing these incentives, but over the course of the past year it has consistently failed to engage with the need to shift UK food environments towards more healthy and sustainable dietary patterns.

Plans to improve the food environment have been delayed this year, with both the planned ban on HFSS volume promotions and HFSS advertising restrictions pushed back to 2025. The Food Data Transparency Partnership (FDTP) that was announced in the 2022 government Food Strategy is progressing, albeit slowly, with the government making the disappointing decision to scale the FDTP health working group back from a mandatory to a voluntary reporting framework. As a result of the delays, the health working group has not yet agreed a consistent approach to monitoring or reporting and the eco working group has now delayed making any formal announcements on how it will report on carbon targets until 2024, as opposed to ahead of COP28 as previously planned (Quinn, 2023).

This lack of intervention and regulation from government has had a noticeable impact on business performance this year. Companies are delaying moving to set new commitments until the government establishes frameworks and metrics, and give a clear signal that they are committed to the healthy and sustainable diet agenda. Until there is some much-needed government leadership, there will continue to be examples of some forward-thinking businesses acting to support healthy and sustainable diets, but it is unlikely we will see any sector-wide changes at the scale and pace required.

The need for mandatory reporting - an investor perspective

Investors are increasingly aware of the material financial risks – systemic, direct and transitional – if we fail to transition our food system to one which is healthy, sustainable and affordable. If the Paris Agreement goals are not successfully met, it is estimated that global temperature rises of around 4°C will result in \$23 trillion of global economic losses over the next 80 years (Kompas *et al.*, 2018). Planet Tracker, 2023 predicts that if food system risks are unmitigated, individual firms could lose up to 26% of their value, with an average 7% hit for the food sector (based on the largest 40 companies). The Institute for Public Policy Research (IPPR) also reported 2.5 million people are economically inactive due to long-term health issues, a portion of which have strong links to diets (IPPR, 2022). This impact is further illustrated by OECD research that shows obesity reduces employment rates and increases early retirement, absenteeism and presenteeism rates. This results in a reduction in labour market outputs by the equivalent of 944,000 fulltime workers per year in the UK. This is a risk which impacts businesses throughout the economy (Cecchini & Vuik, 2019).

How companies respond to these issues – and to the changing regulatory, citizen and other stakeholder demands surrounding them – will influence not only their social licence to operate, but also the long-term resilience of their operating models and supply chains. 'Laggard' businesses that retain high revenue

dependency on sales of foods that are unhealthy and environmentally damaging may find that their strategies become less effective over time and may struggle to reach their defined goals, losing value as a result (The Investor Coalition on Food Policy, 2021; The Food Foundation, 2023c).

To fully understand the risks many food businesses are exposed to and understand where to allocate capital, investors need access to good quality, comparable data. Disclosure of health and sustainability performance by companies is currently patchy and inconsistent. This hinders the ability of investors and other stakeholders to compare performance across and within sectors, and accurately understand where progress is being made or not (ShareAction, 2021; The Food Foundation, 2022c).

Mandatory reporting would be transformative in enabling investors to understand the considerable direct and systemic risks facing the food system. It would help to increase the comparability of data on food businesses' targets, commitment, and progress, supporting investor engagement and stewardship efforts (The Food Foundation, 2021). Well-designed regulation and standard setting, to promote greater transparency and accountability, creates an essential enabling environment for businesses seeking to build long-term thinking and sustainability into their business models.





Standards and Transparency

Standards are the mechanism that enable a business to measure and report. They are an essential ingredient for corporate transparency. Standard setting can come about as a result of government requirement, public pressure, or the business's own drive for social responsibility.

As the adage goes, 'what gets measured, gets managed' – this remains true for business performance on health and sustainability targets; there is a positive correlation between robust governance, comprehensive commitments, and overall business performance. Retailers who scored highly on governance within the Access to Nutrition Initiative (ATNI) tended to rank highly overall (ATNI, 2022).



THIS SECTION LOOKS AT THREE KEY METRICS ON STANDARDS:



METRIC 1
Businesses that report and set targets



METRIC 2
Board-level accountability for health and sustainability targets



METRIC 3
Power imbalances within the food industry



Businesses that report and set targets

No company discloses information and has a target for both types of protein (animal and plant) sales



It's important for businesses to publicly disclose data so that external stakeholders can track a company's performance. Target setting is of equal importance, as it not only defines a company's ambition to both internal and external audiences but is the all-important first step to meaningful change. Once a target is set, action follows.

A good indicator of how healthy and sustainable business portfolios are, is the balance of products companies sell. The food industry needs to sell less unhealthy and environmentally damaging foods if it is to help shift our consumption patterns. There are three key metrics which can help us to understand how healthy and sustainable company portfolios are:

1. % of sales of high fat, salt and sugar (HFSS) foods
2. % of sales of fruit and vegetables
3. % of sales of types of protein (animal and plant)

The Food Foundation's **Plating Up Progress** benchmark assesses 27 major retailer and OOH companies in the UK across a range of topics that have an impact on human and natural capital. A company is scored based on whether it has a target for and disclose data on these three key metrics, Tables 1 - 3 (as well as a range of other metrics which are not covered in this report).

Out of the 27 retailers, contract caterers, casual dining and quick service restaurants assessed, **no company has a target for and reports on all three metrics.**

1. **Eight companies (Aldi, Asda, Greggs, Lidl, M&S, Sainsbury's, Tesco and Waitrose) have a target and disclose data for HFSS.**
1. **Six companies (Compass Group UK & Ireland, Sodexo, Lidl, Sainsbury's, Tesco and Waitrose) have a target and disclose data of fruit and vegetables.**

There is a strong link between protein mix within a company's portfolio and their scope 3 GHGs. Although many companies do not disclose sales of protein by source, some have set **Science Based Targets (SBTi)**. SBTi go some way to tackling the environmental impact of our diets, but also encompasses emissions reductions from other parts of the value chain and business. **Setting targets on both types of protein sales focuses business efforts on changing our diets and reducing GHGs associated with meat production specifically.**

A good indicator of how healthy and sustainable business portfolios are, is the balance of products companies sell.

RETAILERS

Supermarkets continue to be the best sector overall for setting targets and reporting on them. This trend of retailers leading the way is reflected globally, with the World Benchmarking Alliance's (WBA) recent food and agriculture benchmark showing retailers are much further ahead of food service companies in setting targets to increase sales of healthier food (WBA, 2023).



M&S, Morrisons, Ocado, Sainsbury's and Tesco show no shifts in performance between 2022 and 2023. This year Lidl now publicly disclose tonnage sales that comes from animal and plant protein, following Tesco and Sainsbury's. Lidl and Sainsbury's are the only retailers that have targets and report on both HFSS and fruit and vegetables sales and continue to be the leading companies overall within the sector.

Of the retailers, Waitrose has made the most progress since last year. The supermarket now reports on its sales of plant protein and has set a target and reports on sales of fruit and vegetables.

OOH

The OOH sector is broken down into three subsectors: contract caterers, casual dining, and quick service.

Amongst the contract caterers, Compass Group UK & Ireland is the only company to have made a positive shift by starting to report on sales of HFSS and is the leader within its subsector. ISS and Sodexo have not shifted since last year, and Elixir and Aramark have both regressed by no longer disclosing data – Elixir has stopped disclosing sales of fruit and vegetables, and Aramark does not disclose sales of HFSS or types of protein. Data disclosure is an essential first step for businesses trying to improve the health and environment profiles of their portfolio, so it is disappointing to see both Elixir and Aramark becoming less transparent with their sales data. Overall, though, caterers are the best subsector within the OOH sector for setting targets and reporting on them.

All the companies within the casual dining sector are on par with one another. Whitbread has fallen in the ranking this year as it no longer discloses a target or data for sales of fruit and vegetables. Greggs continues to be the leader amongst the quick service restaurants for its commitments to improve the health profile of its portfolio, whilst Burger King's target to have 50% of sales plant-based by 2030 positions it as leading the way on helping people to eat more sustainably.

OVERALL

Despite some small improvements amongst the businesses assessed, it is disappointing to see that overall levels of transparency for the three key indicators of healthy and sustainable diets has remained the same, or in the case of the OOH sector, worsened. Whilst this report assesses businesses performance within the UK, it is worth noting that some businesses are performing better outside of the UK, particularly with regards to setting targets and disclosing data on their protein sales. Lidl Germany has recently announced targets for sales of animal versus plant protein and Aramark within the USA is very progressive.

Lidl Germany have recently announced targets for sales of animal versus plant protein



The lack of progress within the UK is partly due to the government's lack of coherence and leadership in progressing mandatory reporting, and the delays in establishing the health working group have slowed down the move towards agreeing a consistent set of metrics for food businesses to report against. Businesses remain in a reporting limbo, with no clarity for the foreseeable future on which metrics they should be using or how to measure them.

What can businesses do?

Businesses need to set targets and report on the % of sales for: 1. HFSS foods, 2. Fruit & Vegetables and 3. Types of protein (animal and plant).

TABLE 1 Companies targets and disclosure data of healthy versus less healthy foods (HFSS v non-HFSS)

CATERERS	Company	Data disclosure	Target
	Aramark	✗	✗
	Compass	✓	✗
	Elior	✗	✗
	ISS	✗	✗
	Sodexo	✗	✗

CASUAL DINING & RESTAURANT CHAINS	Company	Data disclosure	Target
	JD Wetherspoon	✗	✗
	Mitchells & Butlers	✗	✗
	Nando's	✗	✗
	The Restaurant Group (TRG)	✗	✗
	Whitbread	✗	✗

QUICK SERVICE RESTAURANTS	Company	Data disclosure	Target
	Domino's	✗	✗
	Greggs	✓	30% of the items on shelves will be healthier choices by the end of 2025.




















QUICK SERVICE RESTAURANTS	Burger King	✗	✗
	McDonald's	✗	✗
	SSP Group	✗	✗
	KFC	✗	✗




SUPERMARKETS	Company	Data disclosure	Target
	Aldi	✓	70% of total own-brand food and drink sales (excluding alcohol) will come from healthier products by 2025.
	Asda	✓	Increase the proportion of healthy own-brand products to 60% by 2024.
	Co-op	✓	✗
	Iceland	✓	✗
	Lidl	✓	Increase sales, based on tonnage, of healthy and healthier products to at least 80% by 2025.
	M&S	✓	Grow sales of healthier foods to 70% of sales tonnage by the end of 2024/25.
	Morrisons	✗	65% of own-brand pre-packed products will be classified as non-HFSS by 2025.
	Ocado	✗	✗
	Sainsbury's	✓	At least 85% 'Healthy' or 'Better for You' sales tonnage by 2025.
	Tesco	✓	Increase the proportion of sales of healthy food to 65% by 2025.
Waitrose	✓	65% of own-brand sales will be from healthy foods and drinks by 2026.	

TABLE 2 Companies targets and disclosure data of fruit and vegetable

CATERERS	Company	Data disclosure	Target
	Aramark	✗	✗
	Compass	✓	We pledge to increase procurement volumes of vegetables across all sectors of Compass Group UK and Ireland by 20% by the end of 2022.
	Elior	✗	✗
	ISS	✗	Increasing the servings of vegetables by 10%.
	Sodexo	✓	Increase the volume of vegetables procured by 16% by 2025.
	Company	Data disclosure	Target
JD Wetherspoon	✗	✗	
Mitchells & Butlers	✗	✗	
Nando's	✗	✗	
The Restaurant Group (TRG)	✗	✗	
Whitbread	✗	✗	
QUICK SERVICE RESTAURANTS	Company	Data disclosure	Target
Domino's	✗	✗	
Greggs	✓	✗	
QUICK SERVICE RESTAURANTS	Burger King	✗	✗
	McDonald's	✗	✗
	SSP Group	✗	✗
	KFC	✗	✗
SUPERMARKETS	Company	Data disclosure	Target
	Aldi	✗	Not public
	Asda	✗	✗
	Co-op	✓	✗
	Iceland	✓	✗
	Lidl	✓	Increase sales of fresh fruit and vegetables by 35% by 2026.
	M&S	✗	✗
	Morrisons	✗	✗
	Ocado	✗	Increase own-brand fresh vegetable range by at least 10% by 2022.
	Sainsbury's	✓	Increase vegetable sales by 1% by 2025/2026
	Tesco	✓	Increasing the amount of own-brand ready meals containing at least one of 5 a day to 50%, rising to 60% by 2024.
Waitrose	✓	Increase the tonnes of vegetables sold from own-brand meal solutions by 2024	

TABLE 3 Companies targets and disclosure data of animal versus plant protein

CATERERS	Company	Data disclosure	Target
	Aramark	✗	✗
	Compass	✓	25% reduction of animal protein by 2025, 40% by 2030. 
	Elior	✓	40% reduction in beef consumption as part of vision to reduce carbon emissions by 12% per meal by 2025. 
	ISS	✗	✗
	Sodexo	✗	33% of menus to be plant-based worldwide by 2025.  
CASUAL DINING & RESTAURANT CHAINS	Company	Data disclosure	Target
	JD Wetherspoon	✗	✗
	Mitchells & Butlers	✗	✗
	Nando's	✗	✗
	The Restaurant Group (TRG)	✗	✗
	Whitbread	✗	✗
QUICK SERVICE RESTAURANTS	Company	Data disclosure	Target
	Domino's	✗	✗
	Greggs	✗	✗
	Burger King	✗	A 50% meat free menu by 2030.  
	McDonald's	✗	✗
	SSP Group	✗	✗
KFC	✗	✗	
SUPERMARKETS	Company	Data disclosure	Target
	Aldi	✗	Not public 
	Asda	✗	Grow Asda plant-based sales by 100% by 2023. 
	Co-op	✓	10 products from the GRO range in over 1000 stores by the end of 2023, increasing to 15 by 2025.  
	Iceland	✗	✗
	Lidl	✓	400% sales increase in our own brand meat free and milk alternative range by 2025.  
	M&S	✗	Double sales of plant-based by 2024  
	Morrisons	✗	Grow own-brand Plant Revolution range by 300% by 2025. 
	Ocado	✓	✗
	Sainsbury's	✓	✗ 
Tesco	✗	300% increase in sales of meat alternatives by 2025.  	
Waitrose	✓	To increase the amount of fruits, vegetables and plant-based foods (by 10% volume by 2030) 	

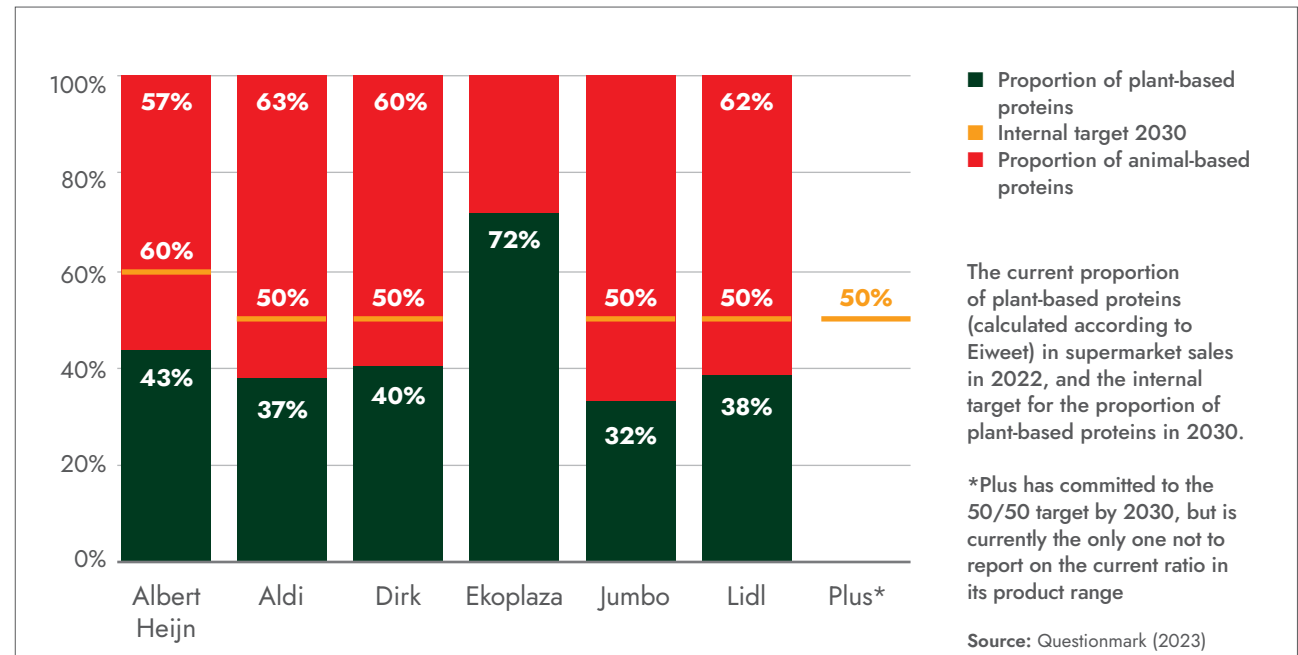
 WWF retailers commitment for nature
  Business has a target to increase sales of plant based protein
  Business has a target to increase sales of animal protein

Clear targets and methodology have enabled Dutch supermarkets to set meat reduction targets

In the Netherlands, a harmonised methodology for measuring and monitoring absolute sales of protein has enabled most Dutch supermarkets to set targets and be transparent on their meat sales. This methodology, known as the 'Eiweet method' was developed by the Green Protein Alliance, ProVeg Netherlands, Questionmark, Natuur & Milieu and Dutch retailers.

When Questionmark's first Superlist Green was published in 2021, Albert Heijn, Aldi, Ekoplaza and Lidl recognised their role in the protein transition but did not have targets or report on them. Two years later, and since the development of the Eiweet method, Albert Heijn, Aldi, Dirk, Ekoplaza, Jumbo and Lidl now report on their share of animal versus plant-based proteins and all the Dutch retailers have set targets to reduce the sales of animal protein. These targets all meet or exceed (in the case of Albert Heijn) the Ministry of Agriculture, Nature and Food Quality's target of 50/50 animal and plant-based protein sales by 2030.

FIGURE 4 Dutch supermarkets on the way to their protein transition targets



The Food Made Good Standard

In the absence of public scrutiny and government regulation it is easy for food companies within the OOH sectors to stay under the radar and not take any steps to change business practices. There are, however, a small number of forward-thinking businesses who are trying to improve the sustainability of their food offering.

The Sustainable Restaurant Association’s (SRA) **Food Made Good Standard** is a voluntary, paid-for accreditation whereby companies are scored (from 0-3 stars) based on their sustainability performance across three areas: ‘Sourcing’ (covers supplier relationships, traceability, human rights across the supply chain, biodiversity, animal welfare and sustainable seafood); ‘Society’ (includes workplace practices, fair treatment of staff, community outreach, nutrition and responsible drinking); and ‘Environment’ (carbon emissions, water and energy use and waste management from both food and non-food).

Recognising that sustainability is a journey, the process is designed to encourage and reward continuous improvement. Similar to the Michelin system, even a one-star rating is a significant achievement and indicative of a business that is making great strides in the right direction. As well as receiving a score, the companies are provided with tailored feedback and practical steps on how to improve.

Of the 20 companies with 20 or more outlets participating in the Food Made Good Standard, 10 score the top available mark. All except two businesses with a lower star rating (the majority of Food Made Good participants) did not give us permission to include them.

TABLE 4 Showing score of OOH companies with 20 or more outlets

BUSINESS NAME	SECTOR	STAR RATING
Brunning & Price	Pub	3
CH&Co	Caterer	3
Eurostar	Travel	3
Frankie & Benny's	Restaurant	3
Gather & Gather Ireland	Caterer	3
Lexington Catering	Caterer	3
Restaurant Associates	Caterer	3
Searcys	Caterer	3
University College London	University	3
Wagamama	Restaurant	3
Young & Co's Brewery PLC	Pub	3
The Heart with Smart Group (franchise operators of Pizza Hut and Itsu)	Restaurant	2
Wells & Co	Pub	0



“We want to help our customers eat healthy and sustainable diets. Whether it's signposting products with nutritional benefits or reducing the salt, calorie, sugar or saturated fat in our food, we want to make the healthy choice the easy choice, without compromising on the delicious taste customers expect from Waitrose.

Our 'Good Health' logo now appears on over 2000 products and we want to expand this further. We have also set a healthy product sales target which is influencing how we sell and promote items. We are huge supporters of transparency in the food sector and will continue to make our data on healthy and plant-based sales available to help drive positive change.” JAMES BAILEY, EXECUTIVE DIRECTOR OF WAITROSE



Board-level accountability for health and sustainability targets

Sainsbury's and Lidl are the only companies in which formal accountability for the company's nutrition targets lies with the CEO.



A company can better sustain and achieve its health and sustainability targets if commitment for them comes from the very top of the business. Good leadership looks like board members taking responsibility for sustainability and nutrition targets to ensure they are integrated across the business. Ideally, the remuneration of C-suite executives would be linked to the successful delivery of a formal target and strategy for achieving the targets.

Of the 11 major retailers, Sainsbury's and Lidl are the only companies in which formal accountability for the company's nutrition targets lies with the CEO. For five other retailers – Asda, M&S, Morrisons, Tesco and Waitrose – accountability lies with a committee that reports to the board or an executive manager (ATNI, 2022). With regards to sustainability, Co-op and Tesco are the only retailers currently linking board member remuneration packages to long-term environmental outcomes, such as achieving scope 3 emissions targets (Feedback, 2021).

There is a lack of information in the public domain on board-level accountability. The findings presented by ATNI and Feedback were gathered from questionnaires

completed by the businesses, as opposed to being taken from publicly available reports. This is perhaps unsurprising given that topics such as remuneration and bonuses are a sensitive topic. However, the lack of publicly available information suggests a dearth of food businesses with any kind of accountability mechanisms in place for their health or sustainability targets.



“It's imperative for investors to have access to consistent, comparable and reliable financial data. Similarly, investors need to be able to draw on high-quality, consistent, comparable nutrition-related data across geographies. We need to be able to compare apples to apples, and pears to pears.”

ALEXANDER BURR, ESG POLICY LEAD OF LEGAL AND GENERAL INVESTMENT MANAGEMENT

What can businesses do?

To avoid accusations of green- or health-washing, businesses need to put in place mechanisms that ensure accountability for meeting or missing climate and nutrition targets lies with board members and directors.

Corporate lobbying in need of scrutiny

Lobbying is the process whereby different interested stakeholders meet with policymakers and politicians to present their views on specific policy areas. Lobbying is a key part of any democratic system as it allows policymakers to make good public decisions, but there are power issues and imbalances to be aware of (So, 2022a).

Food and drink is big business in the UK, with an estimated half a million people working across around 12,000 companies with a combined turnover of £112 billion in 2021. Lobbying by the food and drink industry is therefore common practice in the UK. Research has highlighted not only the lobbying by businesses in the food and drink industry, but a notable amount of lobbying by food and beverage industry trade associations, as well as by the media and advertising sectors in relation to food policy issues (So, 2022a; So, 2022c).

To ensure the public is aware of lobbying, the UK government has implemented processes that aim to guarantee such activities are correctly declared. Quarterly data on MP and other officials’ meetings, gifts, hospitality, and overseas travel is released on each government department’s website. However, this

information is difficult to find, making the process rather opaque. Not all lobbying interactions are declared either; for example, emails, calls, messages, ‘corridor conversations’ or interactions at formal or informal events are not recorded. Finally, the information about the purpose or desired outcomes of the interactions, tends to be vague and covers broad subject areas (So, 2022a).

Other countries have stricter requirements for declarations of lobbying interactions. In the European Union, interested parties have to be registered on the

European Commission’s Transparency register before they can take part in any meetings with EU officials.

The UK could benefit from looking at other countries’ declarations processes to make the UK’s system more stringent and thereby improve transparency, accountability, and trust in lobbying and how it affects policymaking (So, 2022a). Given the importance of lobbying in the policy-making process, the **Investor Coalition on Food Policy** has decided to make this a focus area of their work over the coming year.

Transparency data

Defra's ministerial meetings, January to March 2023

Updated 26 September 2023
[Download CSV 18.5 KB](#)



Minister	Date	Name of organisation or individual	Purpose of meeting
Mark Spencer	10/01/2023	Scottish Fishermen's Federation	To feedback post negotiations.
Mark Spencer	10/01/2023	NFU Poultry Board	To discuss farming (poultry) policy

Source: Defra (2023)



“Companies must ensure that all public policy engagement and lobbying activities are aligned with their company strategy and with their nutrition policy. Our ask is to have oversight of such activities, swiftly rectifying any misalignment.”

MARIA LARSSON ORTINO, GLOBAL ESG MANAGER OF LEGAL & GENERAL INVESTMENT MANAGEMENT



Power imbalances within the food industry

A **quarter** of food sector workers experienced food insecurity in January 2023.



What can businesses do?

As major UK employers', retailers should set an example for food sector businesses by reviewing their pay levels and becoming accredited Real Living Wage Employers .

Despite seeing operating profits dip over the last few years during the cost of living crisis, executive pay among food retailers has remained extremely high. In contrast, a quarter (25.8%) of food sector workers experienced food insecurity in January 2023 (The Food Foundation, 2023d). This is a higher figure than the proportion of workers in education and healthcare experiencing food insecurity. A disproportionate number of those struggling to meet the rising prices of essential goods and services are likely to be Black and minority ethnic workers; research has shown that workers from these groups are more likely to earn below the Real Living Wage, and the food industry has the highest proportion of Black and minority ethnic workers of any industry sector (ShareAction, 2023).

Higher costs for retailers meant that operating profits and margins for the sector fell in 2022/23 but executive pay remained high. In contrast, retail 'low pay'* levels were at 14.5% compared to 9% across the whole economy (Resolution Foundation, 2023).

Figure 5 shows the executive or CEO pay rates (defined as the total pay banked for that year, including salary plus bonuses and other benefits, as recorded in the company's

annual report) and the shop floor worker base pay (total pay, not including bonuses – if available – or any other remuneration) of the 11 largest retailers in the UK from 2021-2023. They are ranked in order of pay gap ratio for 2023, from smallest to biggest. 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.

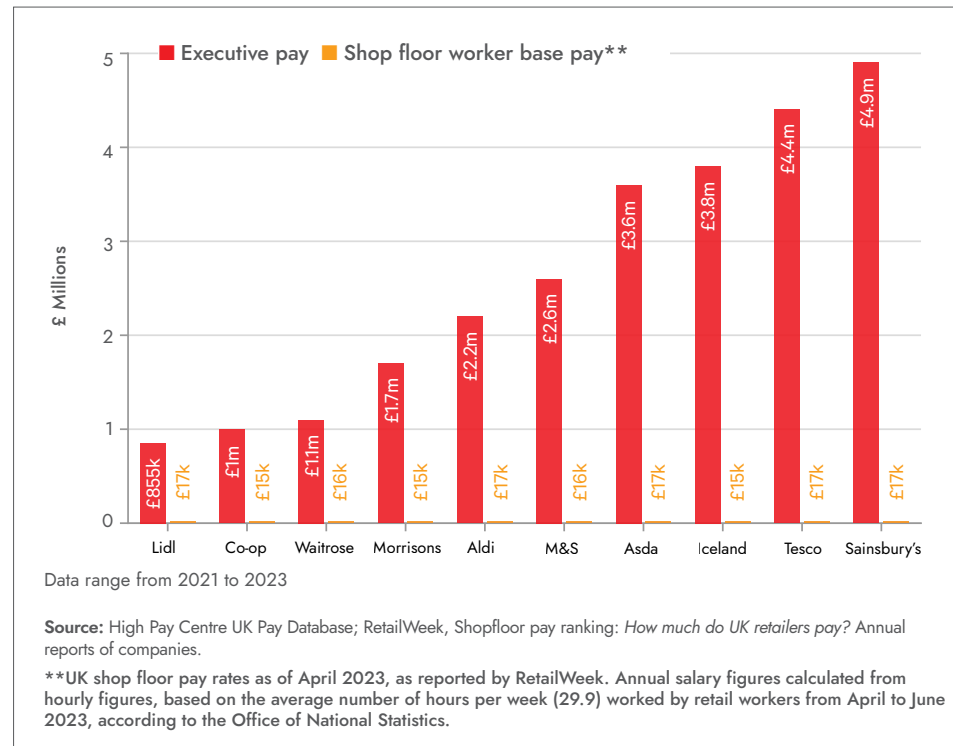


“COOK is a Real Living Wage employer and B-Corp. We pay the Real Living Wage because it's the right thing to do and it also makes business sense. It gives our workforce a better shot at being able to afford to eat healthily, which is essential for mental and physical health. Paying a Real Living Wage is especially important during a period of inflation, as food prices and other living costs have sky-rocketed.”

JAMES PERRY, CEO OF COOK

*'Low pay' in this instance refers to 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 (Resolution Foundation, 2023).

FIGURE 5 Annual salary figures from top executives and shopfloor workers within UK supermarkets



Our analysis shows that the pay gap between executive level and shopfloor workers is high across all large food retailers. The retailer with the biggest pay gap between executive and shopfloor pay, based on the available data, was Sainsbury's with a pay gap of £4.8 million. The retailer with the smallest pay gap was Lidl with £837,000. Asda, Morrisons, Sainsbury's and Tesco have consistently had the largest market share of the retailers (although the discounters Aldi and Lidl have rapidly gained market share in recent years) and it is notable that Sainsbury's and Tesco have the biggest pay gap whilst also having the largest share of the UK retail market (Statista, 2023; Kantar, 2023).

FIGURE 6 Percentage of workers paid at or below the National Minimum Wage and below the Real Living Wage by sector in 2022



Low pay is a problem across the food sector. Despite a rising minimum wage having caused low pay to fall in the UK since 2015 and in the food sector since 2013, the prevalence of low pay remains around three times as high in the food sector compared to the wider economy. Figure 6 shows that the percentage of food sector workers earning the National Minimum Wage or below is more than double that of workers across the whole economy, and the comparison of workers below the Real Living Wage by sector follows a similar trend (Resolution Foundation, 2023).



Affordability



Price plays an important role in determining what food people buy or choose when shopping or eating out. However, the more sustainable and healthy options are not always the most affordable ones. To make these options more accessible, supermarkets and the OOH sector need to make healthy food cheaper than less healthy food, and plant-based alternatives need to be the same price, or cheaper, than animal source foods.

THIS SECTION LOOKS AT THREE KEY METRICS ON AFFORDABILITY



METRIC 1
Support for households during the cost of living crisis



METRIC 2
Multibuy promotions on food types



METRIC 3
The cost of more sustainable alternatives to meat and dairy



Support for households during the cost of living crisis

Over a **quarter** of multibuy deals are on HFSS food and drink, compared to just **4.5%** of multibuy deals on fruit and vegetables and **4.2%** on staple carbohydrates.



Better pricing for health is critical in ensuring that low-income groups are able to access a healthy diet during the cost of living crisis

In April 2023, food price inflation reached its highest level for four decades. Although it has since slowed, the cost of a basket of food for an adult male and adult female as part of a reasonably costed, adequately nutritious diet has increased by 28.9% and 25.5% respectively since April 2022 (The Food Foundation, 2022b). This will impact on UK citizens' diets with a number of health consequences – particularly for low-income families who bear the brunt of food price rises. In June 2023, 9 million adults (17% of households) were experiencing food insecurity, with levels among children doubling in the 12 months to January 2023 (The Food Foundation, 2023d). The picture emerging from the cost of living crisis suggests that budget pressures are already impacting on the healthiness and quality of diets. Defra's Family Food Survey captures UK households' purchases of food from both retail and the OOH sector. Concerningly, purchases of vegetables dropped to their lowest level in fifty years for the last year we have data (2021-2022). This suggests that the cost of living crisis is having a profound impact on household purchasing habits and dietary health. Lower income households are being most affected; a Food Foundation survey of 10,000 adults in January 2023 found around half

of households with food insecurity reported buying less fruit and vegetables (The Food Foundation, 2023b).

This means there is an opportunity to use the crisis to push for lasting dietary change, as well as an urgent need to act, so that those most at risk don't see the quality of their diets rapidly deteriorating due to cost pressures. There is growing evidence that customers are becoming more price conscious, with cost increasingly trumping brand loyalty. However, businesses investing in price ought not to be at the expense of health.

In response to the situation, The Food Foundation launched the Kids Food Guarantee: a set of actions which we think retailers (and manufacturers) should have in place as a minimum to support families facing food insecurity. Better pricing for health is critical for ensuring that low-income groups are able to access a healthy diet during the cost of living crisis. Using data provided by **Questionmark**, we have been monitoring retailer progress against the Kids Food Guarantee areas since April, finding that although some positive progress is being made, this is not happening at the pace or scale that's needed.

For further information and analysis of retail progress, visit the **Kids Food Guarantee dashboard**.

FIGURE 7 Kids Food Guarantee



The Food Foundation Kids Food Guarantee

Actions to guarantee that children can eat well during the cost of living crisis and prevent lasting damage to their health and wellbeing

Make essentials affordable

1 Fruit and Veg Guarantee

Ensure that at least a week's worth of 5 a day (>10 different products, fresh, frozen or tinned) are competitively priced and available at all stores.



2 Staples Guarantee

- Guarantee multibuy deals are on carbohydrate staples not on HFSS foods
- Guarantee wholegrain and/or 50:50 wheat products are at price parity or at a lower price to the refined equivalent
- Guarantee budget ranges are available in every store, including local and convenience
- Offer an own brand formula and/or insulate prices on first infant formulas from the worst of inflation.



Support health for those feeling the squeeze

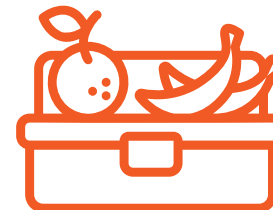
3 Kids Categories Guarantee

Guarantee that products in two key kid's categories responsible for the majority of sugar intake (yogurts and boxed breakfast cereals) are both healthy and affordable. The cheapest options ought to have the best health profile.



4 Lunch box Guarantee

Lunchbox meal deal. Offer weekly lunchbox items that are compliant with School Food standards and make up 5 lunches that can be bought through a multibuy deal.



Rebalance shopping baskets

5 Act for a healthier, more sustainable future

- Advocate for the expansion of the Healthy Start scheme
- Promote and communicate the Healthy Start scheme
- Rebalance advertising so that a greater % of promotions, marketing and campaigns are focused on healthier and more sustainable staple foods such as fruit and veg, pulses and wholegrains.



FIRST INFANT FORMULA

Why it matters: Up until the age of six months, breast milk or first infant formula are a baby’s sole source of nutrition and hydration. Safe, nutritionally adequate, and affordable first infant formula is therefore essential where caregivers cannot, or choose not to, provide breastmilk for their infants. Between March 2021 (before food prices started to rise) and April 2023, the seven standard powdered first infant formulas sold by the market leaders increased in cost by an average of 24%, with some brands seeing a much higher rate of inflation of up to 45% (First Steps Nutrition Trust, 2023).



LEADERS	<p>1. ALDI’s Mamia brand is the only own-brand formula available across all retailers and remains the cheapest standard formula when looking at price per tin. It is 62% cheaper than the most expensive option even though it had the largest percentage price increase of all formulas since 2021.</p> <p>2. In September, Iceland discounted all formula sold in their stores. This led to a 7% reduction in price for first infant formula brands</p>
LAGGARDS	<p>Tins of standard first infant formulas are on average most expensive at Waitrose and Co-op across the nine major retailers. The price of one formula brand increased at Asda between June and November. In addition, Asda’s move to discount follow-on formula but not first infant formula means that some first infant formula brands now cost more than the same brand equivalent follow-on formula. As follow-on formula is not recommended for babies aged under six months, this is concerning, given that the lower price may lead to caregivers purchasing follow-on formula instead of first infant formula.</p>
ACROSS THE SECTOR	<p>Despite being an essential, there is a huge range of pricing across different brands of first infant formula, as well as the same brand when stocked across different retailers. This is despite all first infant formulas being nutritionally comparable.</p>

YOGURT

Why it matters: Yogurt is a staple item for many families. It provides a valuable source of calcium for young children and is a food that caregivers are often likely to buy in the belief that it is a relatively healthy option. Many yogurts are, however, high in sugar; yogurt is one of the ten main categories contributing to children’s sugar intakes (Public Health England, 2017).

What we found: The data referenced below was collected for the period 22nd to 25th August 2023 and was compared to data collected in April and July 2023. Overall, we found that although there are single portion yogurts available across the major UK retailers at very low prices (ranging from £0.07 - £0.14 a pot), the very cheapest yogurts are also higher in sugar (9-10g/100g). In contrast, yogurts with the lowest price for the lowest sugar content cost considerably more; between £0.20 - £0.65 a pot for low sugar yogurts containing <5g/100g. Just 9% of single portion yogurt pots can be categorised as being low sugar (<5g/100g).



There is also a dearth of plain, unsweetened yogurts available for sale in single portion pots. We found just 14 plain, unsweetened yogurts available across the largest five supermarkets (3.7% of the sample). These also come with a price premium, costing an average of £0.82 per pot compared to £0.65 for sweetened or flavoured yogurts.

LEADERS	<p>Tesco offer three plain, unsweetened yogurt pot options, with two products coming in at just £0.28 per single pot serving. It has also recently launched two new low sugar yogurts for kids within the Tesco own label brand.</p>
	<p>Sainsbury’s and Asda both offer the largest number of plain, unsweetened yogurt options across the five largest retailers.</p>

LAGGARDS Just one plain, unsweetened yogurt product is available to buy online from Aldi. The cheapest yogurt with the lowest sugar content available at Aldi is the most expensive option across the five major supermarkets (£0.65 per pot).

ACROSS THE SECTOR There is a real opportunity to increase the availability and affordability of plain, unsweetened yogurt in more convenient and snackable single portion pots. On average, these currently cost 26% more than sweetened and flavoured yogurts. This is despite being the best option for young children, who are recommended to avoid (or have only very limited amounts of) free sugar in their diets.



The highest sugar yogurts tend to be branded products. For example, a Müller Bliss Lemon Greek style yogurt (the Müller Bliss Lemon Greek style yogurt) is consistently the cheapest yogurt with the highest sugar content across four of the five major UK retailers, containing six cubes of sugar (five of which are added sugar). Manufacturers should look to lower the sugar content of their yogurts and retailers should label the highest sugar yogurts as desserts.

CEREAL

Why it matters: Ready to eat cereal is a staple item for many families and caregivers and is perceived as a relatively healthy option. Whilst cereal can provide a good source of fibre, many are high in sugar, salt and fat. Cereal is one of the ten main categories contributing to children’s sugar intakes (Public Health England, 2017).

LEADERS 1. Sainsbury’s puffed wheat cereal has a low NPM score (-6) and costs just 37p per 100g. Their own-label versions of popular cereals are both more affordable and healthier than the branded equivalents, with their version of Shreddies costing five times less than the Nestle version per 100g.

LAGGARDS Branded cereals perform poorly on both price and health profile compared to retailer own-brand products. Supermarket own-brand cereals offer citizens the most affordable and healthiest options by quite some way, costing just 39p per 100g of cereal on average compared to 65p for branded cereals.

ACROSS THE SECTOR A Kellogg’s branded cereal (Kellogg’s Crunchy Nut Granola Chocolate & Hazelnuts) is consistently the cheapest cereal with the highest (worst) Nutrition Profiling Model score across four of the five major UK retailers. Foods with a score of 4 or more are categorised as being HFSS. The Kellogg’s cereal in question has a NPM score of 18, with a third of cereals (33%) high in salt, fat or sugar (HFSS). Manufacturers such as Kellogg’s and Nestle who have the largest market share of boxed cereals in the UK must do more to ensure their cheapest cereals have a better health profile.



“To improve the health of the nation it’s crucial that people are enabled to make healthy, nutritious choices more easily, so as an industry, we must remain committed to prioritising health within our portfolios. However, the Government also has an essential role in promoting the consumption of healthy products; so we need to see those important HFSS regulations being implemented in full, alongside clear parameters as to what constitutes a healthy product, so that healthier products with clear nutritional labelling are the norm on our shelves.” JAMES MAYER, PRESIDENT UK & IRELAND, DANONE

MULTIBUYS

Why it matters: While promotions make products cheaper, they also tend to encourage people to buy more of the promoted category than expected. On average, multibuy offers increase the amount purchased by 22% (Public Health England, 2015).

LEADERS	<p>Tesco. Just 6% of Tesco’s multibuy deals are on HFSS food and drink, as defined by the government’s Nutrient Profile Model (NPM). Following the government’s decision to postpone the planned ban on HFSS multibuy deals to 2025, Tesco showed leadership by making a commitment to stop running multibuy deals on HFSS food.</p> <p>Asda has made the most progress since April, with an increase in the proportion of offers on non-HFSS foods of 1.6%, including a 1.2% increase in offers on staple carbohydrates.</p>
LAGGARDS	<p>Morrisons. 11% of multibuy deals go towards food and drink defined as HFSS at Morrisons. The proportion of multibuy deals on non-HFSS food and drink decreasing by 2.5% between April and July.</p>
ACROSS THE SECTOR	<p>Although not all retailers have a policy of offering multibuy deals, those that do should make sure that where volume promotions are offered, these are on healthier staples rather than HFSS foods. Currently, over a quarter (27.3%) of multibuy deals are on HFSS food and drink, and 21.5% are on meat and dairy. Comparatively, just 4.5% of multibuy deals are on fruit and vegetables and 4.2% on staple carbohydrates. Where retailers do not offer multibuy deals, they should ensure that healthier staples like fruit and vegetables are offered at competitive prices (provided that any cost savings aren’t simply pushed back onto growers and producers) throughout the year, with budget ranges available across all stores.</p>

LUNCHBOXES

Why it matters: 900,000 children living in poverty in England do not qualify for the government’s Free School Meals scheme. Many of these children are unable to afford lunch from the school canteen and instead are reliant on packed lunches (or are unable to afford any food at all). Research shows that less than 2% of packed lunches meet School Food Standards, and are a far less nutritious option than school meals. Retailers can play a crucial part in helping families to access and afford healthy lunchbox items.



LEADERS	<p>We looked at how much a reasonably healthy packed lunch costs from five of the major retailers, finding that Tesco offer the best value, at £8.30 for a week’s worth of lunchbox items. Tesco was the only one of the five major retailers where the cost of healthy lunchboxes came down between August and October (from £8.39 to £8.30).</p>
LAGGARDS	<p>Morrisons was the most expensive of the major five supermarkets for families looking to buy healthy lunchbox items in both August and September. The price of a lunchbox cost £11.80 at Morrisons in October, 42% more expensive than the same items available at Tesco.</p>
ACROSS THE SECTOR	<p>A reasonably healthy packed lunch can be bought relatively cheaply across UK retailers but there is room for improvement. For example, no retailer currently has a meal deal for children’s lunches but this would go a long way in helping time-poor families on tight budgets provide their children with a healthy packed lunch.</p>

What can businesses do?

Retailers should support the Kids Food Guarantee and ensure they have measures in place to support low-income households with children to access affordable healthy essentials.



Promotions and offers

21.5% of multibuy offers are on meat and dairy foods, compared to **4.5%** on fruit and vegetables.

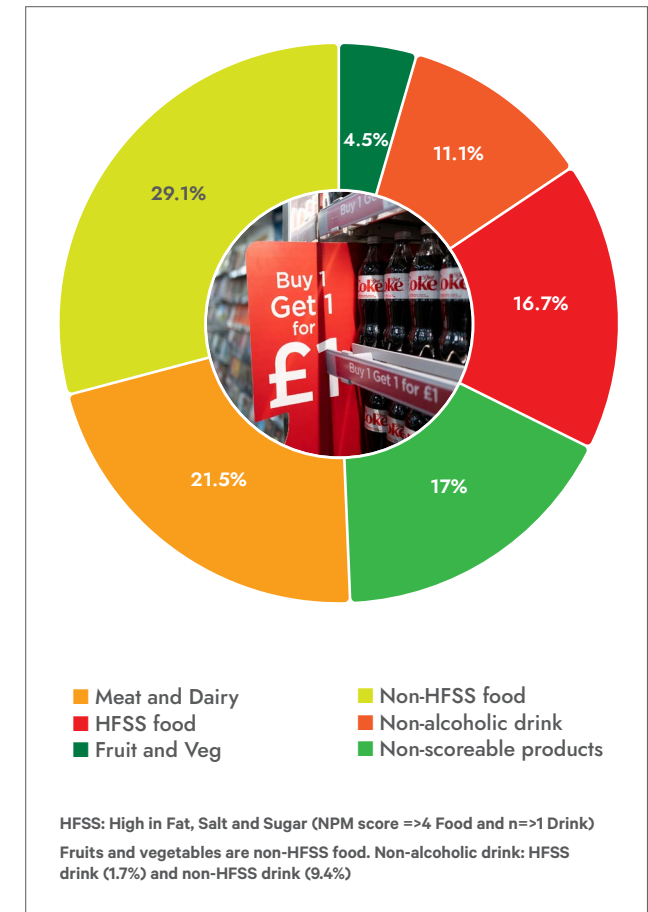


Multibuy deals, such as ‘buy one get one free’ (BOGOF) or ‘3 for 2’, are promotions on food and drink items that allow a greater volume of the item in question to be purchased for a set price. Research indicates that although promotions reduce the cost of the product, they often lead people to purchase more than expected (Public Health England, 2015).

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. Looking at multibuy offers available across three of the largest UK supermarkets (Asda, Morrisons, and Tesco), we found that over a fifth (21.5%) of deals offered were on meat and dairy foods. This compared to just 4.5% of deals on fruit and vegetables. Of the offers on meat, 7.75% were on red meat. Just 2.2% of offers were on plant-based alternatives to meat, fish and dairy, with 80% of these products categorised as non-HFSS.

These findings tally with a 2021 study which found that four of the UK’s largest supermarket chains (Asda, Sainsbury’s, Tesco and Morrisons) use multibuy or price reductions to sell greater volumes of meat (Eating Better, 2022). This is despite all four having Net Zero commitments and pledging their support to combat the climate crisis.

FIGURE 8 Multibuy deals across different food products



OPPORTUNITIES TO SHIFT INCENTIVES AWAY FROM HFSS TOWARDS HEALTHIER PLANT FOODS

In July 2020, the government announced it would legislate to end the promotion of HFSS products in England. This would apply to promotions by volume and location, both online and in store. However, the government's definition of HFSS foods for these new regulations used a narrower definition than the government's widely used NPM. Meat with an NPM score of 4 or more is included within the HFSS definition in the NPM, but excluded from the HFSS regulation definition. This means that red and processed meat that is HFSS can continue to be promoted in multibuy deals and at checkouts. The government ought to remove this loophole and bring forward the restriction on HFSS multibuys which was postponed to 2025 earlier this year.

Pulses and beans are an example of healthy and sustainable foods that would benefit from increased advertising and promotion via creative and disruptive marketing. The low purchasing and consumption levels of pulses and beans in the UK predominantly result from poor availability of pulse-based food options, as well as low levels of familiarity with, and social acceptability of, these products. As these foods are usually relatively cheap to buy, rather than price it is time, knowledge, and the perceived difficulty of cooking with pulses that are the main barriers to increased consumption levels (Henn *et al.*, 2022). Efforts to make beans and pulses more appealing and to increase sources of inspiration for using pulses could therefore help to drive up purchases.



What can businesses do?

Businesses should restrict marketing of meat-based HFSS and HFSS foods. Where multibuy deals are offered, these ought to be on healthier staples.



The cost of more sustainable alternatives to meat and dairy

Plant-based chicken alternatives are on average **27%** more expensive than a chicken breast.



Given the co-benefits for both health and the environment, a shift towards less processed plant foods ought to be the goal of strategies to reduce diet-related GHGEs. The market for plant-based meat alternatives has grown exponentially in recent years, with a multitude of meat alternatives now available. The vast majority of these come with significantly reduced GHGEs compared to meat, although their nutritional profile is highly variable (The Food Foundation, 2023e).

Meat and dairy alternatives can act as a helpful bridge for citizens whose usual diets are centred around animal-based foods, encouraging them to reduce the amount of meat and dairy they are eating without having to radically shift their habitual cooking and eating patterns. However, products often come at a price premium that is a barrier to many, and prevents more people from choosing sustainable alternatives. A recent study carried out by the Centre for Climate Change and Social Transformations (CAST) showed that using incentives – such as making vegetarian meals relatively cheaper than meat-based options – could be effective in promoting higher intake of lower carbon foods (CAST, 2023).

THE COST OF ALTERNATIVES TO MEAT AND DAIRY

In the UK, plant-based meat and dairy products are approximately 32% higher than their meat alternatives (Good Food Institute, 2021). This is notably worse when compared to the Netherlands, where plant-based alternatives are now cheaper than meat (ProVeg, 2022).

Here we look at chicken and milk as examples of frequently eaten animal-based foods in the UK that are priced below their more sustainable alternatives.



CHICKEN

While red meat intake has declined, chicken consumption has grown over the past decade, accounting for over 50% of total UK meat consumption (The Food Foundation, 2023f). Chicken is a cheaper alternative to red meat and thus a more affordable source of protein for many. While direct emissions associated with poultry are lower than for red meat (e.g. beef), chicken-rearing indirectly contributes to deforestation because poultry is often fed soy. This effectively shifts GHGEs offshore to countries such as Brazil, where significant amounts of forest land are cleared to grow soy that is then exported as feed for the poultry and pig sectors. But the impacts of our love for eating chicken are felt on UK soils too; the widespread farming of chicken and chicken feed growing is a major driver of biodiversity loss. Increasing the consumption of plant-based meat alternatives is essential for reducing pressure on natural ecosystems at risk of conversion (Ukropcova & Halevy, 2017).

There is a real opportunity for food businesses to champion pulses as an affordable, healthy and sustainable alternative to meat

A survey conducted by the London School of Hygiene & Tropical Medicine (LSHTM) for the Broken Plate report earlier this year, found that plain plant-based chicken alternatives are on average 27% more expensive than a chicken breast, despite having substantially lower GHGEs. There was less of a notable difference in price between the more processed coated chicken pieces and their plant-based alternatives, although the coated plant-based chicken pieces again had lower greenhouse gas emissions.

Beans and pulses – less processed plant-based alternatives to meat – are usually cheaper than both animal-based foods and more processed alternatives. They also score highly across a range of health and environmental indicators. There is therefore a real opportunity for food businesses to champion pulses as an affordable, healthy and sustainable alternative to meat.

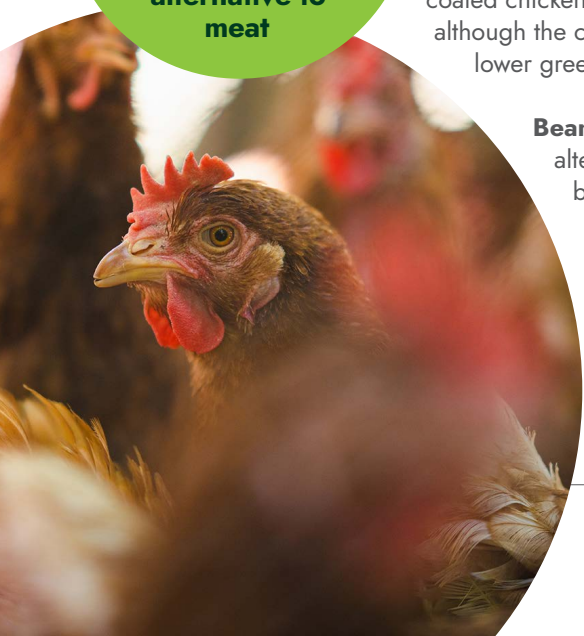


FIGURE 9 Price per 100g of chicken and plant-based alternatives

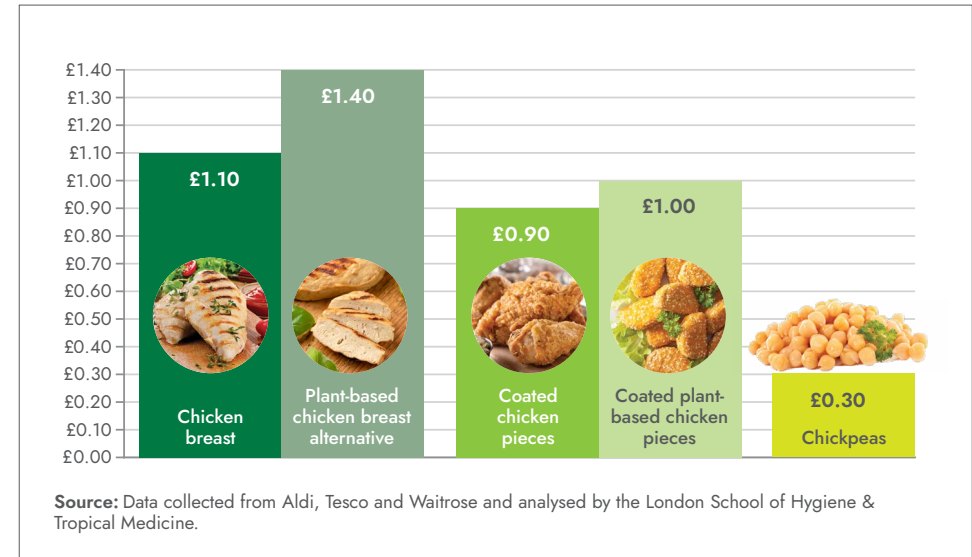


FIGURE 10 Greenhouse gas emissions per 100g of chicken and plant-based alternatives (gCO₂e)



MILK

The main option for reducing dairy consumption is to switch to plant-based equivalents. Like alternative meats, these products come with a significantly smaller carbon footprint than their dairy counterparts and, if fortified, largely match dairy's content of calcium, iodine and vitamin B2. Like alternative meats, plant-based milk alternatives in the UK are more expensive than dairy milk (The Food Foundation, 2022a). Oat and rice are the most expensive milk alternatives at £1.79 and £1.72 per litre respectively. Soya milk is marginally more affordable at £1.31 per litre. By contrast, dairy milk is just £1.00 per litre on average based on cow's milk sold in 2 pint bottles.



FIGURE 11 Average price of dairy milk and plant-based alternatives

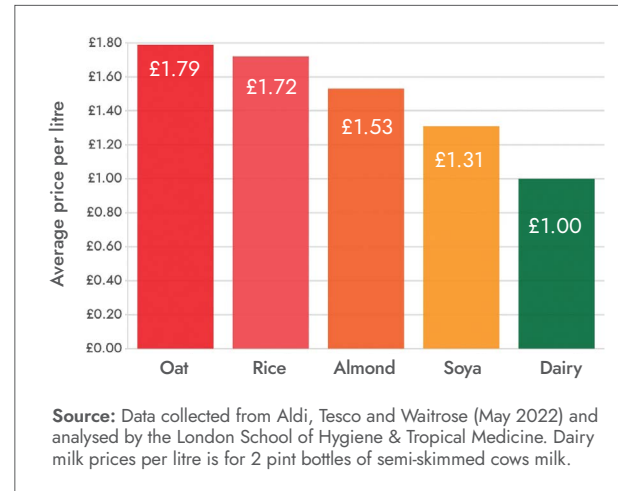
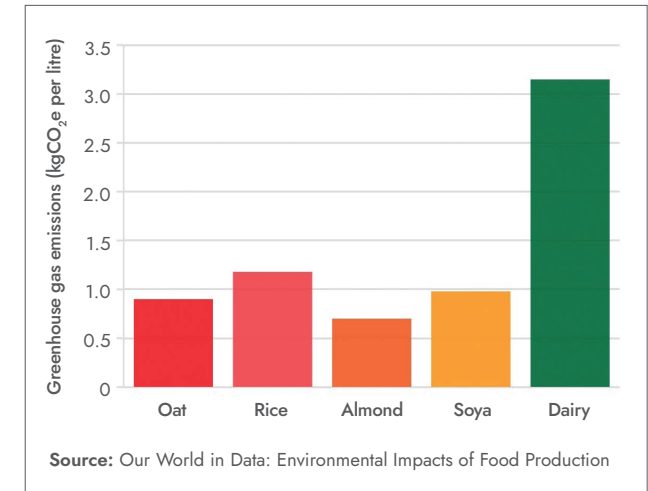


FIGURE 12 Environmental impact of dairy milk and plant-based alternatives



WHAT ARE BUSINESSES CURRENTLY DOING TO SUPPORT THE AFFORDABILITY OF PLANT-BASED FOODS?

In May 2021, Co-op UK became the first and only major retailer to commit to introducing price parity with animal-based products across their entire own-label Gro range of plant-based products. Co-op cut the prices on some products – including vegan sausages and burgers – by as much as 50%.

The price match was part of Co-op's 10-point climate-change action plan which set out the blueprint for it to achieve net-zero by 2040 (for both its direct and indirect carbon emissions). Tesco followed shortly in the wake of Co-op's move, expanding its range and slashing prices across its budget Plant Chef range (ProVeg, 2023).

However, earlier this year **Co-op reversed its commitment to making plant-based food cheaper**, stating in its evolved climate plan that it is focusing on availability

instead of price (Co-op, 2023). Increasing the range of plant-based alternatives is important to grow the economies of scale that should enable the price of plant-based alternatives to start to reduce, it is disappointing to see UK retailers making little progress towards offering plant-based alternatives at price parity with animal foods.

Conversely, Lidl Germany announced in October 2023 that almost the entirety of its own-brand vegan range, Vemondo, will be priced at the same level as animal products, and that these products are to be placed in direct vicinity to their animal counterparts in all of their stores (Vegconomist, 2023a). The price reduction is part of the retailer's protein strategy to significantly reduce meat choices and nearly double the share of plant-based protein by 2030 (Siegfried, 2023; The Future of Protein Production, 2023).

What can businesses do?

Both retailers and the OOH sectors should look to offer plant-based alternatives at price parity with meat and dairy. Given the variability in the nutrition profile of many alternatives, with some containing higher levels of salt and saturated fat than their animal-based equivalents (Alessandrini *et al.*, 2021; Frezal, Nenert and Gay, 2022), there is also a clear need for manufacturers and retailers of plant-based alternatives to improve their health profile through reformulation and a more health-focused approach to research and development.

Tesco slashed costs across its budget Plant Chef range



Credit: (Instagram/Tesco)



“Shifting consumption towards plant-rich, less carbon intensive diets in countries where meat consumption is high (such as the UK) is essential if we are to meet our climate goals. But we can’t rely on individual choices alone. What we really need is for governments and businesses to step up and intentionally create a food environment that will make healthy and sustainable food much more affordable and accessible to all of us.”

Meat alternatives can be part of the solution, but, so far, they have been expensive and mostly marketed at vegetarians and vegans. We know from our research that it’s the best way to turn a lot of people off! To be effective, meat alternatives need to taste like meat, be price competitive, be similar or better nutritiously and environmentally than the products they aim to replace and be marketed in a way that appeals to flexitarians and meat eaters.”

ANNE BORDIER, DIRECTOR OF FOOD INITIATIVES, WORLD RESOURCES INSTITUTE



Availability

The food on offer to people when shopping for their groceries or eating out of the home plays a big role in shaping people's diets. Healthy and sustainable food needs to be not just more readily available, but available in higher proportion to unhealthy and unsustainable food (Pechey et al, 2019). This needs to be the case within supermarkets and across the OOH sectors, including fast-food chains, grab and go sandwich bars, high street restaurants, pubs and restaurants. It's simple – people won't be able to choose healthy and sustainable options in the first instance if they are not available.

**THIS SECTION
LOOKS
AT TWO
METRICS:**



**METRIC 1
Healthy menus**



**METRIC 2
Meaty menus**





Healthy menus

27 out of the **54** restaurants assessed have more than half of their main meals exceeding **50%** of the Recommended Daily Intake (RDI) of salt.

Pubs are the unhealthiest OOH subsector, with **Walkabout, Sizzling Pub, Flaming Grill Pub Co, Ember Inns** and **Brewhouse** serving the largest number of main meals that are regularly exceeding **50%** of the RDI for calories, saturated fat, salt and sugar.



More people are eating out than ever before. In recent years there has been a shift in the way we eat out of the home; gone are the days where a restaurant visit was restricted to birthdays or family celebrations - we now eat out on a much more regular and informal basis. Cafés and quick service restaurants are easy places to pick up food during a busy day, take-aways can be purchased on the way back from school or work, and high street restaurants, pubs and dessert shops have all risen in popularity over the past decade.

While people's desire to socialise over food should be celebrated, OOH meals are 21% more calorie dense than meals cooked at home (Nesta, 2023). As people are eating out more often, it follows that people are more regularly eating foods that are higher in those nutrients associated with poor health. As obesity levels and diet-related health issues continue to rise, more scrutiny is needed on the OOH sector and the nutritional content of the food they serve.



WHAT WE DID

This metric looks at the 84 major quick service, casual dining restaurants and cafes in the UK and assesses the nutritional quality of their menus. Restaurants were selected either because they had 250 employees or more in 2020, or fell within the top 100 in terms of sales using a list from 2013. Amongst the list of discounted companies are some of the largest restaurant chains within the UK, including Ask, Pizza Hut and Zizzi. Of the 84 companies, 30 have been discounted

because their data is incomplete - the full list of these companies plus the rationale for why they haven't been included is in the appendix. Using data provided by Cambridge University, we assessed the macronutrients of each main meal on the menu to understand what percentage of the meals are exceeding 50% and over for the Recommended Daily Intake (RDI) of calories, sugar, saturated fat, and salt. Table 5 shows the 10 worst offending restaurants for each macronutrient.

The worst offending restaurants are overwhelmingly pubs, followed by burger outlets. Walkabout, Gourmet Burget Kitchen, Sizzling Pub, Flaming Grill Pub Co, Brewhouse, and Ember Inns all exceeded 50% of the RDI on three of the four nutrients (calories, saturated fat, salt, and sugar). The restaurant that scored worst overall was the Tank and Paddle, a pub chain in London with two premises, owned by the larger group Stonegate Pub Company. The number of meals within restaurants that are regularly exceeding 50% RDI of salt is alarmingly high, with **47% of the restaurants analysed having more than half their mains exceeding 50% of the RDI of salt.**

At the other end of the scale, it is reassuring that a number of casual dining and quick service restaurants had very few mains exceeding 50% RDI for any of the nutrition indicators we analysed. Crussh and Starbucks are the best performing, with none of their mains exceeding 50% of the RDI. Subway, KFC, Caffè Nero, Pure and Greggs are not far behind (interestingly “health conscious” Leon scores worse than the aforementioned businesses). It is encouraging that despite many of these leading companies selling foods which are regarded as ‘unhealthy’, they have managed to reformulate their meals so that they have fewer nutrients of concern - for instance, KFC took the decision to stop salting its chips in 2005.



What businesses need to do:

Firstly, all large food businesses need to adhere to government regulation and disclose the calorie content of their menus. Businesses, particularly pubs, must learn from other high street restaurants and fast-food chains and reformulate their products so they include less sugar, saturated fat and especially, salt.

For each nutritional indicator we have ranked the ten poorest performing restaurants based on the proportion of their main meal offerings that exceed 50% of the RDI for that particular nutrient. Businesses that appear in more than one macronutrient have been highlighted.

TABLE 5 Percentage of main meals exceeding 50% of the Recommended Daily Intake for macronutrients

SATURATED FAT

	COMPANIES	SAT FAT
1	Tank and Paddle (Stonegate Pub Company)	80%
2	Gourmet Burger Kitchen	70%
3	Greene King	58%
4	Brewhouse and Kitchen	57%
5	Toby Carvery	56%
6	Stonehouse Pizza & Carvery	52%
7	Flaming Grill Pub Co.	51%
8	Yates	50%
8	Walkabout	50%
10	Marstons	49%
10	Ember Inns	49%

SUGAR

	COMPANIES	SUGAR
1	Yates	84%
2	Flaming Grill Pub Co.	74%
3	Honest Burger	53%
4	Hungry Horse	51%
5	Farmhouse Inns	46%
6	Gourmet Burger Kitchen	46%
7	Sizzling Pubs	46%
8	Walkabout	45%
9	Beefeater Grill	44%
10	Harvester	49%

CALORIES

	COMPANIES	KCAL
1	Tank and Paddle (Stonegate Pub Company)	51%
2	Farmhouse Inns	48%
3	Hungry Horse	47%
4	Walkabout	45%
5	Flaming Grill Pub Co.	44%
6	Toby Carvery	41%
7	Sizzling Pubs	37%
8	Harvester	37%
9	Brewhouse and Kitchen	35%
10	Ember Inns	33%

SALT

	COMPANIES	SALT
1	Tank and Paddle (Stonegate Pub Company)	94%
2	Gourmet Burger Kitchen	91%
3	Brewhouse and Kitchen	84%
4	Itsu	79%
5	Harvester	77%
7	Wagamama (The Restaurant Group)	74%
6	Joe and the Juice	73%
8	Ember Inns	73%
9	Honest Burger	71%
10	Brewers Fayre	69%
10	Sizzling Pubs	69%





Meaty menus

62% of main meals offered by major UK restaurants contained meat, whereas only 32% were meatless.



For businesses wanting to reduce their GHGEs, a good place to start is by decreasing the amount of animal-based food sales. Meat and dairy sales can represent half of a pub's entire carbon footprint, larger than the emissions driven by other areas of the business such as heating or electricity. If businesses are to lower their carbon emissions, they need to reduce the amount of meat and dairy on their menus and increase the amount of appealing vegetarian and vegan dishes. Information

provided by **Net Zero Now** shows that a simple swap from meat to vegetarian burgers saves a whopping 85% GHGEs.

Partly due to citizen pressure and trends, the OOH sector has been taking positive steps to reduce the amount of meat they sell, for example reformulating meals to include less meat and dairy, or running promotional offers on plant-based dishes. However, the sector is large and

TABLE 6 Carbon emission for meat vs vegetarian burger by ingredient

MEAT BURGER			VEGETARIAN BURGER			Emissions savings
Ingredients	Total (kgCO2e)	Total emissions of a Meat Burger (kgCO2e)	Ingredients	Total (kgCO2e)	Total emissions of a Vegetarian Burger (kgCO2e)	
Whole milk - 16ml	0.0696	4.36	Soy milk - 16ml	0.00928	0.65	85.09%
Butter - 4g	0.05396		Butter - 4g	0.05396		
Plain flour - 40g	0.034		Plain flour - 40g	0.034		
Egg - 1	0.231		Egg - 1	0.231		
Beef - 100g	3.744		Tofu - 100g	0.223		
Cheese - 25g	0.221		Vegan cheese - 25g	0.09		
Lettuce - 10g	0.0037		Lettuce - 10g	0.0037		
Onions - 15g	0.0051		Onions - 15g	0.0051		

diverse, ranging from contract caterers and universities to restaurants and fast-food chains, and how these subsectors perform varies widely.

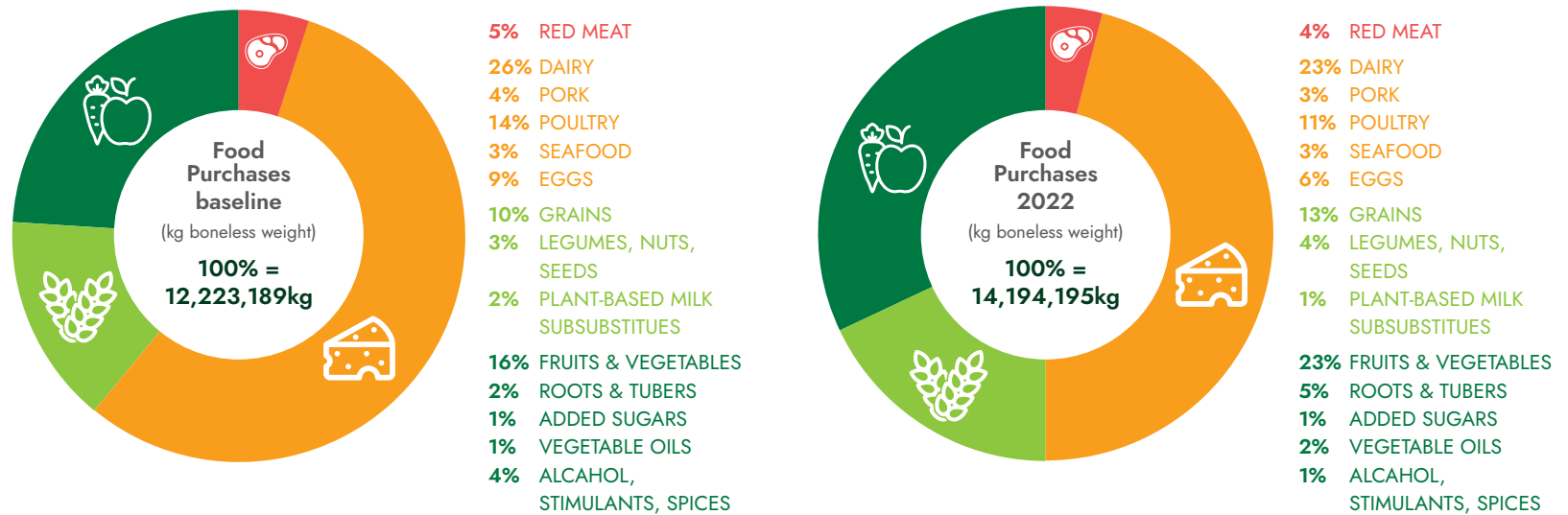
World Resource Institute’s (WRI) **‘Coolfood Pledge’** is an initiative where food-service providers commit to reducing food-related emissions by 25% by 2030 (Coolfood, 2022). The latest data from the global initiative illustrates the differences between sectors; ‘Healthcare’ (which includes hospital dining, both for patients and for guests/employees in hospital cafeterias) and ‘City’ (which encompasses any city-run agencies that include food, such as state schools, homeless shelters, prisons facilities and hospitals) are the two strongest performing sectors: with restaurants showing the least change in GHGEs per plate. Most encouragingly, healthcare facilities have successfully reduced the share of animal-based food on the plate whilst increasing the share of fruit and vegetables.



“Increasing plant-based meals across our business, is one of our main areas of focus as we work to achieve Net Zero by 2030. We serve over 180 million meals a year, so we know we can make a great impact through the dishes that we serve. This year, every one of our sectors has been reviewing their menus and actively making changes that puts plant-based meals front and centre of our offers. Collaborative working has been key to our success, with our nutritionists working closely with our culinary and sustainability leads, to ensure we are creating great tasting, healthy plant-based dishes, that are packed full of veg.”

NICKY MARTIN, DIRECTOR OF NUTRITION AND WELLBEING, COMPASS GROUP UK

FIGURE 13
Change from food purchases from baseline to 2022 for health care facilities worldwide



Note: Food purchases shown for health care members who joined Coolfood prior to 2022.
Source: Coolfood member data, World Resources Institute 2022

Closer interrogation of the restaurant sector shows further variations. We looked at data provided by Cambridge University of the UK’s major restaurants, including 84 casual dining and quick service establishments (such as cafes, restaurants, pubs, cinema chains and takeaways). Of the 84 companies, 13 have been discounted because their data is incomplete - the full list of these companies and the rationale for excluding them is in the appendix.

Of the 71 restaurants included in our analysis, we found that **62% of main meals contained meat, whereas only 32% were meatless***. Within the sector, quick service restaurants performed worse than casual dining restaurants, with 54% of quick service main meals containing meat and 22% containing no meat, on quick service menus, compared to 46% containing meat and 29% containing no meat at casual dining establishments.

Tables 7 and 8 show the 15 companies with the highest percentage of meat main dishes and those with the highest percentage of meatless dishes respectively. **This highlights Chicken Cottage as the worst performing, with 100% of its main dish offerings containing meat. Tossed come out on top, with the highest percentage of meat-free main dishes on its menu – 67%**. It should be noted that for 50% of main dishes which have been categorised as meatless, Tossed do have an option to add meat as part of a choice of protein.

Globally, within the quick service restaurant sector, Burger King Germany has stood out for its efforts to offer a wide range of plant-based products. Since 2022 it has offered a meat-free version of every item on the menu and it opened the world’s first plant-based Burger King restaurant in Cologne. This is starting to show positive

results; the fast-food chain recently reported that one in five meat Whopper burgers is now sold with a plant-based patty (Vegconomist, 2023b). In 2022 Burger King UK set a target to have a 50% meat free menu by 2023. This target is no longer listed on their website.

**Main meals containing fish made up the remaining 6%.*



TABLE 7 Companies with the highest percentage of meat main dishes

	COMPANIES	(%) MEAT
1	Chicken Cottage	100%
2	KFC	90%
3	Flaming Grill Pub Co.	85%
4	Gourmet Burger Kitchen	85%
5	Cineworld	80%
6	Domino’s Pizza	79%
7	Subway	78%
8	Honest Burger	76%
9	ODEON	75%
10	Walkabout	75%
11	Wimpy	75%
12	Sizzling Pubs	68%
13	McDonalds UK	68%
14	Brewhouse and Kitchen	68%
15	Nandos	67%

TABLE 8 Companies with the highest percentage of meatless main dishes

	COMPANIES	(%) MEATLESS
1	Tossed	67%
2	Coffee #1	65%
3	Soho Coffee	60%
4	Pieminister	59%
5	Starbucks	59%
6	Pure	55%
7	Sainsbury’s cafe	53%
8	Bella Italia	52%
9	Farmhouse Inns	52%
10	Pizza Express	51%
11	Coco Di Mama	50%
12	Leon	50%
13	Tank and Paddle	50%
14	Crussh	49%
15	Pret A Manger	48%

Source: Huang et al. (2022). University of Cambridge.

How Wahaca are changing the menu to increase sales of plant-based foods

- In 2022, Wahaca set a target to increase the amount of plant-based foods on their menu by 50%. Its latest data shows that 59% of its menu items (excluding desserts) are vegetarian, and over half (50.5%) of its total quantity sold is vegetarian or vegan. Despite the lower price points of vegetarian meals compared to meat-based dishes, this still converts to almost half of sales (46.7%). 11.5% of sales are vegan.
- Senior managers are also accountable for these targets - senior operations managers are measured on key targets like MSC compliance as well as energy monitoring and efficiency.
- To meet its targets, the restaurant chain has been taking steps to both reduce the amount of meat and dairy on the menu and increase the amount of plant-based food sales. As a result it has:
 - > removed bavette steak dishes from the menu and halved the beef offering.
 - > reduced the amount of cheese by 16% within one of their bestselling dishes.
- The company has had a vegetarian set menu since 2018 and launched its vegan menu in 2021. Over the summer, Wahaca put on two plant-based specials, one of which was the second highest-selling special since the beginning of 2022.



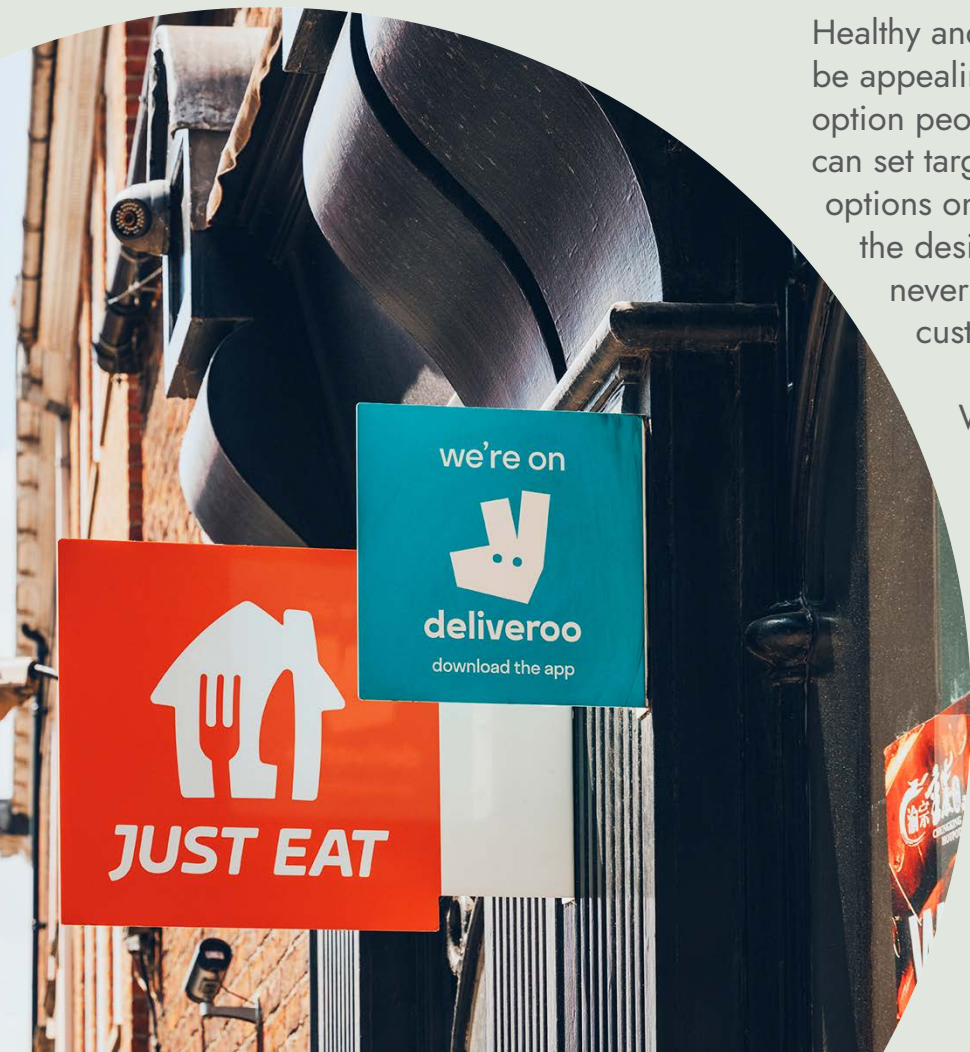
“We’ve had a huge focus on developing delicious plant-based dishes, including as part of each seasonal menu change. But I think for successful conversion to sales, you have to make sure you have both a wide availability of plant-based dishes that also need to be appealing and delicious.”

CAROLYN LUM, SUSTAINABILITY MANAGER, WAHACA





Appeal

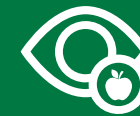


Healthy and sustainable dishes need to be appealing if they are going to be the option people want to choose. Businesses can set targets to include more vegetarian options on menus, but this will not have the desired impact if these options are never promoted or don't appeal to customers.

and nutrition claims, notably with regards to baby and toddler snacks (The Food Foundation, 2023f). Food businesses need to make sure products are being responsibly marketed and increase the amount of marketing and advertising spend on healthy and sustainable food.

Where food businesses promote sustainable and healthy food in stores and online, the healthy and sustainable choices need to be as delicious as others on the menu. Food businesses (especially retailers and manufacturers) have fallen foul of both greenwashing

THIS SECTION LOOKS AT TWO METRICS ON APPEAL



METRIC 1
Advertising of healthier and plant foods



METRIC 2
Promotion of unhealthy meals on delivery apps



Advertising of healthier and plant-based foods

Just **1%** of advertising spend goes towards fruit and vegetables, with **0.8%** going towards plant-based dairy alternatives compared to **9%** on meat and dairy foods.



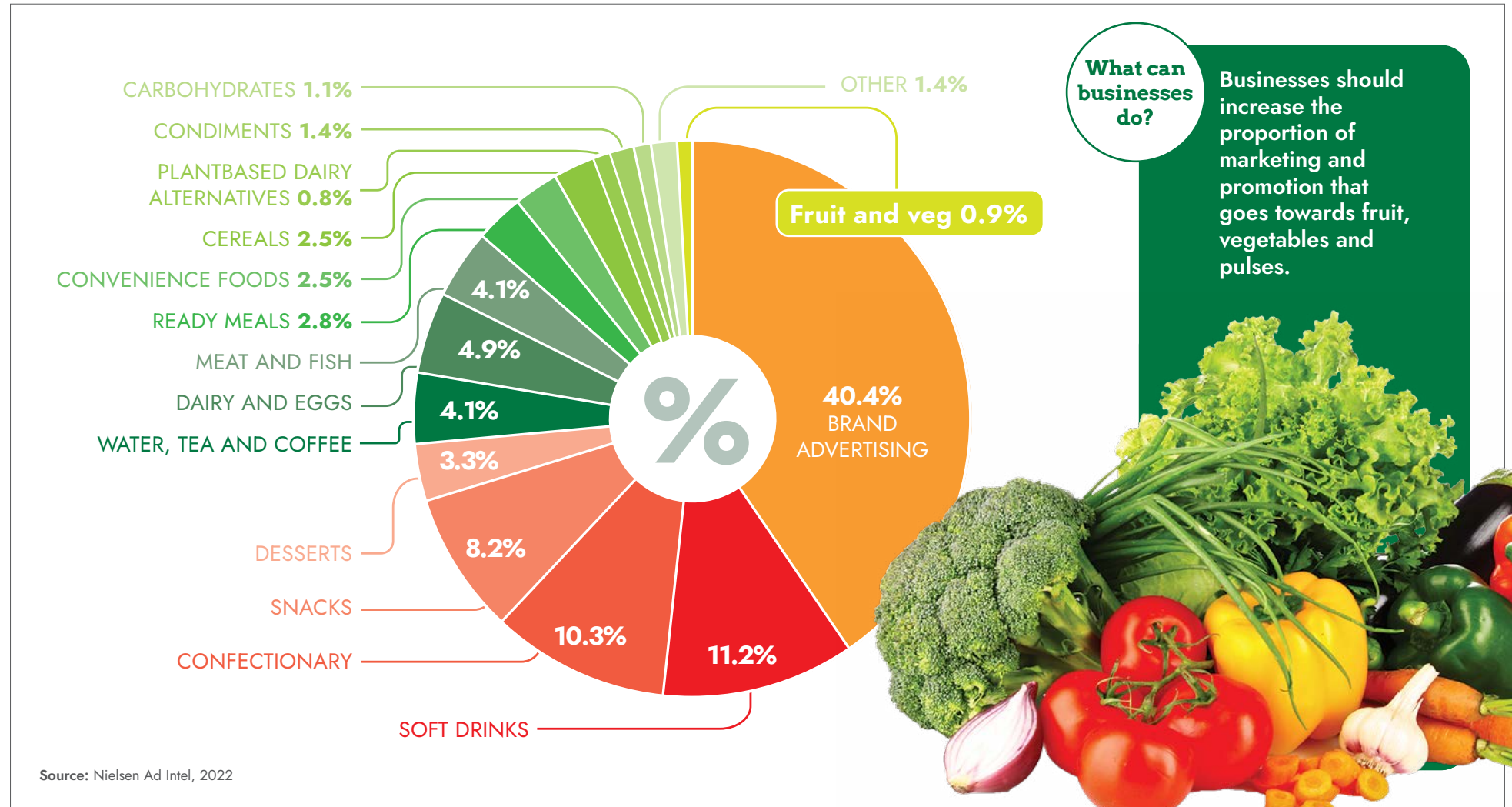
Advertising and marketing are the ‘white noise’ background to our everyday lives. They shape our cultural and social norms, determining what types of food we find appealing (or unappealing). They influence people’s perceptions of foods and food brands, which in turn affects what and how much people buy. Healthier, more sustainable foods such as vegetables and pulses are often perceived to be less appealing and desirable, with food advertising and promotions skewed in favour of less healthy foods.

Our analysis of Nielsen advertising spend data shows that in 2022, the amount spent on fruit and vegetable advertising in the UK was negligible (£10 million/0.9% of total advertising spend on food and drink) in comparison to spend on meat, fish, eggs and dairy (£97 million/9% of total advertising spend) and discretionary foods such as confectionery, snacks, desserts and soft drinks (£360 million, 33% of advertising spend) (Nielsen, 2022). While it is encouraging to see spend going toward plant-based dairy alternatives, this is still a very small proportion of overall spend (0.8%), and, notably, less than the amount spent promoting dairy products (5%). Nielsen data covers traditional broadcast or cable (linear) media spend by both manufacturers and retailers.



Aldi transformed the humble carrot into a trending Christmas advert character in 2021. 'Kevin the Carrot' was the most Google searched Christmas character of the past five years.

FIGURE 14 Proportion of advertising spend on different food categories



Source: Nielsen Ad Intel, 2022



Promotion of unhealthy meals on delivery apps

The number of food outlets people can order from via delivery apps was **50%** greater in the most deprived postcode districts in England, compared to the least deprived.



The UK experienced huge growth in delivery and takeaway demand during the pandemic. Even now, almost a third (31%) of citizens say they eat take-aways at least once a week. This figure grows to 58% in London, with 38% of people aged 18 – 24 saying they eat takeaways between 2 – 3 times a week (KPMG, 2023). Delivery apps, namely Uber Eats, Deliveroo and Just Eat are capitalising on the rise in popularity of takeaways and a third of all food outlets now take orders online (Keeble et al, 2021). In 2020, the number of adults ordering food from delivery apps reached 24.8 million, a 55% increase from 2015 (Nesta, 2023).

Seemingly the take-away culture is here to stay, as are the Meal Delivery Apps (MDAs) that many have come to rely on. Their increasing popularity is arguably creating unhealthier food environments; the average meal delivered tends to be more energy dense and less nutritious, with the average kcal per meal 2 – 3 times higher than RDI (Cancer Research, 2023). An excessive range of foods that are nutrient poor and delivered to the house with increasing swiftness may also lead to a more sedentary lifestyle, which has the potential for further negative health impacts (Hetz *et al.*, 2023). Studies have shown that people who use delivery apps

frequently are more likely to have a higher BMI (Pereira *et al.*, 2005).

It is currently very difficult to understand how healthy or sustainable any of the food being sold through MDAs are, as the digital food environment is currently unregulated and not monitored. Only some companies state the calorie and nutrient profile of their dishes, but as many of the companies on the platforms are small and medium-sized enterprises (SMEs), drawing comparisons between businesses is very challenging (Hetz *et al.*, 2023).

The digital food environment is currently unregulated and not monitored

There also needs to be more research to understand how MDAs are structured, which menu items are placed in the most prominent place at the top of the page, and the use of promotions, deals and other monetary incentives to encourage citizens to buy more. This data is currently owned by the meal delivery app companies and is not being shared with researchers (Hetz *et al.*, 2023).

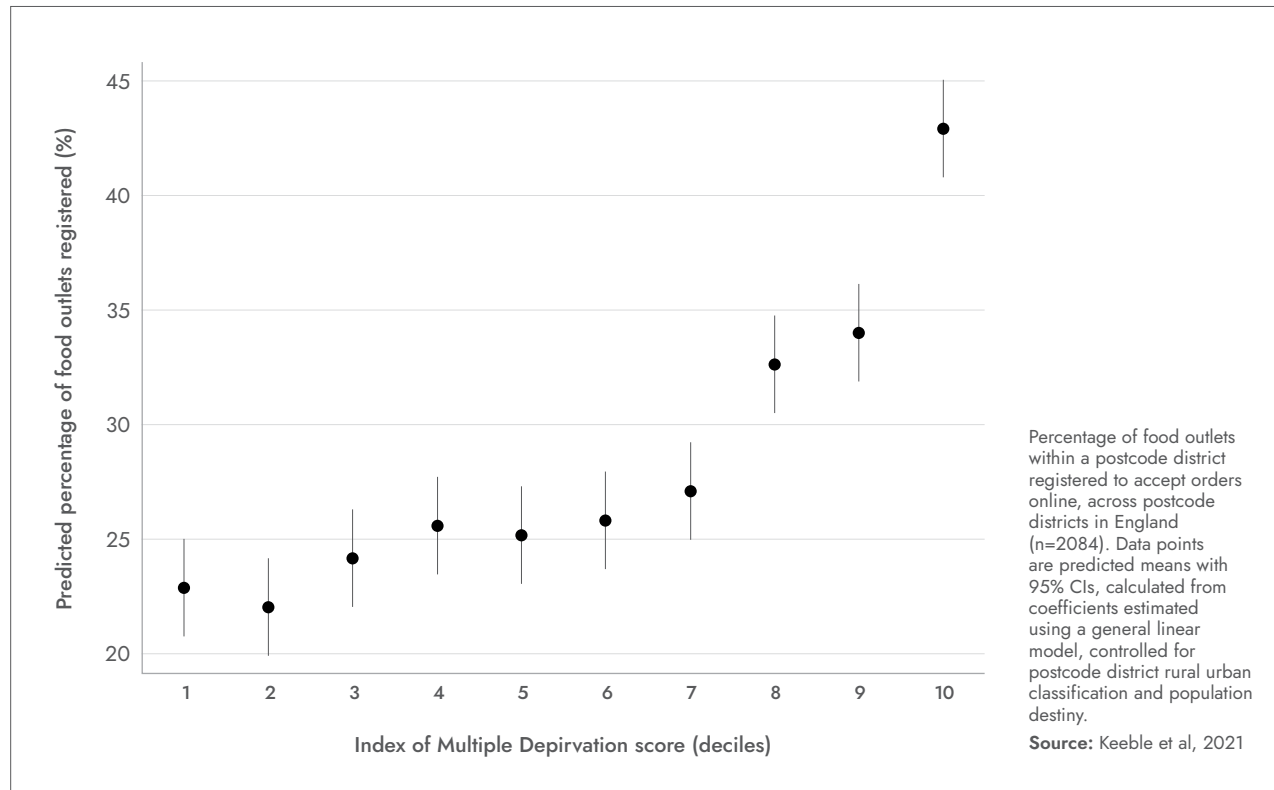
A lack of consistent data and regulation means delivery apps are an easy market for food companies to exploit. Companies are using a variety of marketing strategies such as volume promotions, frequency incentives, price

discounts, positioning and friction (making it harder for you to choose the healthy option).

Research carried out in 2021 using data provided by Just Eat showed that the number of online food outlets was greatest in the most deprived areas of the UK. Additionally, the number of food outlets that

served predominantly food ordered online increased with deprivation (Keeble et al, 2021). Given that food deliveries tend to be more energy dense and less nutritious, the greater prevalence of them in deprived areas of the county will further exacerbate the diet-related health inequalities already deepening within our society.

FIGURE 15 Table showing % of food outlets within the most and least deprived areas in England



What businesses can do: The impact of the online food environment on people's diets is still such an unknown due to the lack of data collected and shared by MDAs. The largest MDAs – Just Eat, Uber Eats and Deliveroo – need to be more transparent and share their data with researchers and other stakeholders. This will help to build a picture of what kind of food is being sold across different regions in the UK and enable the appropriate policies to be put in place. Food companies using the MDAs should also disclose sales weighted data of HFSS foods, fruit and vegetables and types of protein – but this will not happen without government intervention.



Final analysis and recommendations

- 1** Business transparency has stagnated, with fewer businesses disclosing sales weighted data than last year. This negative trend is not being helped by the lack of leadership from government on food, and the fact there is still no agreed way of consistently measuring and reporting the nutrient and carbon content of food. Government needs to build business confidence and signal its commitment to the healthy and sustainable diet agenda by making reporting of sales weighted data mandatory.
- 2** No major companies disclose information and have targets for both types (animal and plant) of protein sales. This is concerning given the impact meat and dairy production has on GHGEs. The retail and OOH sectors must play their part in helping our nation eat less meat and dairy. Data disclosure and target setting is a crucial first step.
- 3** Germany and the Netherlands are currently setting the standard for businesses helping citizens shift towards a more sustainable diet. Both retailer and OOH sector businesses should look to their sister companies in Germany and Netherlands and set equally ambitious targets and strategies to reduce meat consumption.
- 4** The OOH sector is diverse, with performance by subsector varying greatly. Caterers and universities come out as the best subsectors on both health and sustainability, while (perhaps unsurprisingly) pubs and burger joints are the worst offenders on both accounts. Overall, the healthfulness of OOH is still worse than retailers.
- 5** High input costs have led to sharp levels of food price inflation, with lower income households bearing the brunt of this. As food insecurity remains alarmingly high within the UK, retailers must make more concerted efforts to ensure staple healthy food items are more affordable.
- 6** The digital food environment has become very powerful and remains unregulated. Its impact on public health is largely unknown. More pressure should be put on the MDAs to be transparent so that stakeholders can build a picture of what is being promoted and sold.



APPENDIX

a) Executive and shop floor worker base pay rates of the 11 largest retailers in the UK from 2021-2023.

RETAILER	EXECUTIVE PAY	SHOP FLOOR WORKER BASE PAY (2023)*
Lidl	2023: £855,000	£17,102.80
Co-op	2022: £1m	£15,392.52
Waitrose	2023: £1.1m	£16,014.44
Aldi	2021: £2.2m	£17,724.72
Morrisons	2022: £1.7m	£15,858.96
M&S	2023: £2.6m	£16,947.32
Asda	2021: £3.6m	£17,102.80
Iceland	2022: £3.8m	£15,827.86
Tesco	2023: £4.4m	£17,133.90
Sainsbury's	2023: £4.9m	£17,102.80

b) Companies excluded from the healthy menus metric analysis

COMPANIES	REASON FOR EXCLUSION
Asda	No data on sugar/salt/fat/saturated fat
Ask	No data on sugar/salt/fat/saturated fat
Barburrito	All individual ingredients
Ben & Jerry's	No main meals, only ice cream
Ben & Jerry's - No main meals, only ice cream	No data on sugar/salt/fat/saturated fat
Birds Bakery	Only available per 100g not per meal
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

COMPANIES	REASON FOR EXCLUSION
Morrisons	No data on sugar/salt/fat/saturated fat
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 items
Pizza Hut	Nutrition data appears to be per slice
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	No main meals
The Real Greek	No main meals
Thomas the Baker	No main meals
Vue Entertainment	No main meals
Wasabi	Only available per 100g not per meal
YO! Sushi	No main meals
Zizzi	No data on sugar/salt/fat/saturated fat

c) Percentage of company's main meals that are over 50% of the recommended daily intake of calories, sugar, saturated fat and salt.

COMPANIES	KCAL	SUGAR	SATURATED FAT	SALT
All Bar One	7%	25%	37%	60%
Beefeater Grill	15%	44%	36%	58%
Bella Italia	10%	26%	10%	59%
Benugo	0%	36%	0%	0%
Boswell	0%	11%	16%	13%
Brewers Fayre	22%	42%	33%	69%
Brewhouse and Kitchen	35%	32%	57%	84%
Burger King	3%	7%	28%	45%
Café Rouge	7%	19%	31%	48%
Caffe Nero	0%	9%	6%	3%
Coffee #1	0%	32%	13%	0%
Crussh	0%	0%	0%	0%
Domino's Pizza	1%	41%	11%	49%
Ember Inns	33%	36%	48%	72%
Farmhouse Inns	48%	46%	47%	59%
Flaming Grill Pub Co.	44%	74%	51%	68%
GBK	6%	46%	70%	91%
Greene King	18%	42%	58%	48%
Greggs	0%	11%	7%	4%
Harvester	37%	44%	43%	77%
Honest Burger	0%	53%	35%	71%
Hungry Horse	47%	51%	42%	67%
Itsu	0%	7%	7%	79%

COMPANIES	KCAL	SUGAR	SATURATED FAT	SALT
Joe and the Juice	9%	27%	9%	73%
KFC	0%	10%	0%	0%
Leon	0%	12%	12%	21%
Marstons	22%	39%	48%	57%
McDonalds UK	0%	15%	6%	9%
Nandos	7%	20%	10%	20%
ODEON	0%	33%	25%	33%
Pieminister	0%	0%	47%	0%
Pret A Manger	0%	13%	5%	13%
Pure	0%	15%	2%	9%
Sizzling Pubs	37%	46%	37%	69%
Soho Coffee	0%	26%	21%	15%
Starbucks	0%	0%	0%	0%
Stonehouse Pizza & Carvery	25%	7%	52%	61%
Subway	0%	0%	0%	7%
Table Table	23%	35%	32%	66%
Taco Bell	8%	5%	37%	60%
Tank and Paddle	51%	43%	80%	94%
Tim Hortons	6%	12%	21%	18%
Toby Carvery	41%	36%	56%	66%
Tortilla	0%	6%	0%	0%

c) Percentage of company's main meals that are over 50% of the recommended daily intake of calories, sugar, saturated fat and salt (continued)

COMPANIES	KCAL	SUGAR	SATURATED FAT	SALT
Tossed	0%	7%	0%	17%
Vintage Inn	17%	26%	42%	43%
Wagamama	16%	36%	10%	74%
Walkabout	45%	45%	50%	65%
Weatherspoon	31%	30%	33%	66%
Wimpy	7%	6%	28%	29%
Yates	31%	84%	50%	50%

d) Companies excluded from the meaty menus metric analysis

COMPANIES	REASON FOR EXCLUSION
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

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