State of the Nation’s Food Industry 2024

Annex

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Annex A – Targets set by the 36 companies assessed in Plating Up Progress for our three core diet metrics. Blank cells denote no relevant targets.

		Commitments		
	Company	**Healthy sales**	**Fruit & veg sales**	**Animal vs plant protein sales**
Caterers	**Aramark**			
	Compass Group UK & I			Compass UK & I aim to achieve a 25% switch from animal to plant-based proteins by 2025 and a 40% switch by 2030.
	Elior			Increase % purchases of healthy and plant-based ingredients* and % vegetarian recipes
	ISS			
	Sodexo			33% of our menus will be plant-based worldwide by 2025
Casual dining	**JD Wetherspoon**			
	Mitchells & Butlers			
	Nando's			
	The Restaurant Group			
	Whitbread			

Manufacturers	**Greencore**	1. 2030: 85% products classified as 'healthier' <4 NPM (Nutrient Profiling Model) rating (by sales volume) 2. By 2030, 60% of products (by volume) have zero red traffic lights on-pack. (by sales volume)	Increasing the vegetable content of our products and changing the balance of our portfolio to include more vegetable-based products.	
	Mars	At the start of 2021 we set out purpose commitments, with a new ambition of delivering 5.5 billion healthy meals a year by 2025. Through this, we aim to deliver four billion servings of vegetables, a 30% increase in fiber and an additional 5% sodium reduction across our portfolio.		
	Nestle	Increase its healthier food sales by CHF25-30bn by 2030, up 50% from 2022 levels.		
	Nomad Foods	Grow sales from healthier menu choices and nutritionally improved products year on year		
	Premier Foods	More than double sales of products that meet high nutritional standards by 2030. Baseline: 2020/21		£250m sales in plant based products
	Samworth	Increase the		

	Brothers	proportion of our portfolio that is considered nutritionally well-balanced (score 3 or less) as defined by the Department of Health's Nutrient Profile Mode. 54% score less than 4 Average nutrient profiling of portfolio (Nutrient Profiling Model (NPM) score)		
	Unilever	85% of our portfolio to meet Unilever's Science-based Nutrition Criteria by 2028 Progress: 2023 - 81%		€1.5 billion of sales per annum from plant-based products in categories whose products are traditionally using animal-derived ingredients by 2025
QSR	**Domino's**			
	Greggs	30% of the items on shelves will be healthier choices by the end of 2025		By the end of 2025: We are committed to maintaining our vegan product sales as a proportion of our total sales as our business grows. • We'll use more alternatives to animal-sourced foods than the 1125t tonnes in 2023.
	Burger King			By 2030 we will: have a 50% meat-free menu
	KFC			
	McDonald's			
	SSP			By 2025, at least 30% of meals offered by our own brands to be plant-based

				or vegetarian.
Retailers	**Aldi**	By 2025, we've committed to having 70% of our food sales coming from healthier products. We do this by providing the quality and value that customers expect from Aldi	Increase in the number of vegetable portions sold across our own-brand products by the end of 2023 (compared with 2019). Target: 5% by 2023.	
	Asda	Increase the proportion of healthy (non-high fat, salt or sugar content) of Asda's own brand products to 60%. Current progress on target: 52% compared to baseline year (2020)		
	Co-op			
	Iceland			
	Lidl	By 2025, we will increase sales, based on tonnage, of healthy and healthier products to at least 80%	We will increase fruit and vegetable unit sales by 35% by 2026. (compared to 2021).	
	M&S	Continue growing sales of healthier foods to 70% of sales tonnage by the end of 2024/25.		Target £75m sales of plant-based products by 2024/25.C
	Morrisons	Our 2025 targets include 65% of Our Own Brand products are non HFSS by 2025.		We're continuing to make plant-based products more accessible to our customers, including our own-brand Plant Revolution range, which we have committed to grow by 300%.

	Ocado		Increase sales of fruit and vegetables as a key indicator of the healthiness of our customer baskets by 2030.	Increase sales of plant-based proteins to rebalance the ratio with animal protein by 2030.
	Sainsbury's	85% 'Healthy' and 'Better for you' sales tonnage by 2025	Target for vegetable sales: 11.2% by 2025/26.	
	Tesco	Set a target to increase sales of healthy products, as a proportion of total sales, to 65% by 2025. Percentage of volume sales from products with a 'healthy' NPM(b) score as a proportion of total volume of food sales for UK and ROI	We're continuing to explore ways to increase positive nutrients in our products by adding vegetables, fruit and increasing fibre.	Increasing sales of plant-based meat alternatives by 300% by December 2025 in UK, ROI and CE.
	Waitrose	Increase sales of healthy food and drinks to 65%, as a proportion of total volume.	1. Increase the tonnes of veg sold from meal solutions by 2024 2. Increase the volume of fruits, vegetables and plant-based foods sold by 10%.	
Wholesalers	**Bidfood**			
	Brakes			

Annex B: Companies with the highest percentage of meatless dishes - main meals, sides and sharers

	Companies	(%) Meatless
1	Joe & The Juice	69
2	Cookhouse & Pub	68
3	Harvester	62
3	Coffee #1	62
3	Soho Coffee	62
5	Pizza Express	61

5	Sainsbury's Cafe	61
6	Bill's	60
7	Flaming Grill Pub Co.	57
8	Vintage Inns	55
8	Toby Carvery	55
8	Tank and Paddle	55
8	Greene King	55
9	Taco Bell	54
9	Crussh	54
10	Ask	53
10	Pure.	53
10	All Bar One	53

Companies with the highest percentage of dishes containing meat - main meals, sides and sharers combined

	Companies	(%) Meat
1	Chicken Cottage	85
2	Domino's Pizza	74
2	McDonalds UK	74
3	Burger King	73
4	Tim Hortons	69
5	Gourmet Burger Kitchen	67
5	Greggs	67
6	The Cornish Bakery	62
7	Papa John's	61
7	Wimpy	61
7	Walkabout	61
8	JD Wetherspoon	59
8	Town, Pub & Kitchen	59
9	Boswell Cafes	58
9	Table Table	58
9	Birds Bakery	58
10	KFC	57

Annex C

Percentage of main meals, sides and sharers exceeding 50% of the Recommended Daily Intake for nutrients of concern

	Business	Sector	Calories
1	Tank and Paddle	pubs/bars	50
2	Stonehouse Pizza & Carvery	high street restaurants	38
3	Thomas the Baker	cafes	31
4	Town, Pub & Kitchen	pubs/bars	26
5	Nicholson's	pubs/bars	24
6	JD Wetherspoon	pubs/bars	22
7	Toby Carvery	high street restaurants	21
8	Sizzling Pubs	pubs/bars	20
9	O'Neill's	pubs/bars	18
10	Browns	high street restaurants	17

	Business	Sector	Sugar
1	Coffee #1	cafes	43
2	Stonehouse Pizza & Carvery	high street restaurants	41
3	Nicholson's	pubs/bars	41
3	Honest Burgers	high street restaurants	40
4	Town, Pub & Kitchen	pubs/bars	38
5	Tank and Paddle	pubs/bars	35
6	Gourmet Burger Kitchen	high street restaurants	31
7	O'Neill's	pubs/bars	30
8	Sizzling Pubs	pubs/bars	30
8	Harvester	high street restaurants	30
8	Vintage Inns	pubs/bars	30
8	Pizza Express	high street restaurants	29
9	Ember Inns	pubs/bars	29
9	Toby Carvery	high street restaurants	26
10	Browns	high street restaurants	25

			Sat fat
1	Tank and Paddle	pubs/bars	78
2	Gourmet Burger Kitchen	high street restaurants	51
3	Thomas the Baker	cafes	46
4	Pieminister	quick service restaurants	45
5	Toby Carvery	high street restaurants	43
6	Stonehouse Pizza & Carvery	high street restaurants	40

			Salt
1	Tank and Paddle	pubs/bars	88
2	Pizza Express	high street restaurants	76
3	Gourmet Burger Kitchen	high street restaurants	67
4	Taco Bell	quick service restaurants	62
5	Nicholson's	pubs/bars	59
6	Honest Burgers	high street restaurants	56

7	Nicholson's	pubs/bars	39
8	Taco Bell	quick service restaurants	37
9	O'Neill's	pubs/bars	35
10	Vintage Inns	pubs/bars	33

	7	O'Neill's	pubs/bars	50
2	7	Bella Italia	high street restaurants	50
	8	Stonehouse Pizza & Carvery	high street restaurants	46
	9	JD Wetherspoon	pubs/bars	44
	10	Sizzling Pubs	pubs/bars	43

Annex D

Number of adverts for confectionary and snack adverts shown before the watershed

Holding	TVR Children 5- 8 years	Impact Children 5-8 years	TVR Children 9-12 years	Impact Children 9-12 years	TVR Children 13-16 year	Impact Children 13-16 years
GUYLIAN	1.8	58.8	3.2	102.6	5.0	455.8
HARIBO	37.6	1217.6	78.2	2542.8	70.3	2153.2
INTERSNACK	4.1	129.8	10.9	357.3	1.7	50.8
KELLOGG UK HOLDING	30.2	956.2	34.6	1138.3	36.5	1106.0
LINDT & SPRUNGLI UK	5.4	183.3	11.7	378.3	7.7	238.5
MARS UK	25.6	829.4	41.2	1338.0	48.6	1485.6
MONDELEZ UK	20.4	645.9	33.6	1096.5	30.5	928.5
PEFFERMILL HOLDINGS	1.8	56.8	6.8	223.1	10.6	321.7
PEPSICO HOLDINGS	25.8	837.4	35.2	1147.1	30.1	924.0
STORCK UK	2.2	73.0	3.8	123.2	3.2	98.9
THOMAS TUNNOCK	4.9	161.1	9.2	297.1	6.6	203.9
TROPICAL SUN FOODS	0.0	0.0	0.0	0.0	0.0	0.0
WITTINGTON INVESTMEN	8.8	290.0	18.9	607.8	14.8	455.6

Annex E: The proportion of price promotions at each of the six retailers assessed on processed meat, meat, dairy, fruit and veg and staple carbohydrates

Price promotions by individual retailer

Retailer(s)	Promotions on processed meat (%)	Promotions on meat (%)	Promotions on dairy (%)	Promotions on F & V (%)	Promotions on staples (%)
Aldi	0.8	NA	3.1	44.6	1.5
Asda	4.1	0.9	10.0	7.0	4.0
Iceland	7.3	0.9	14.8	8.4	2.3
Morrisons	5.6	0.7	9.7	8.5	3.6
Sainsbury's	5.1	0.4	7.3	5.8	3.1
Tesco	3.2	0.2	5.8	6.3	2.6

F&V: Fruit and veg. NA: Not Applicable, no promotions found on those items.

The Food Foundation