THE STATE OF THE NATION'S FOOD INDUSTRY 2024

The Food Foundation

Which UK food businesses are supporting the transition to more healthy and sustainable diets and what needs to happen next?

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 policy makers (parliamentarians, civil servants, local authorities, business leaders and investors) we use a wide range of approaches to make change happen including events, publications, media stories, social media campaigns and multistakeholder partnerships. We also work directly with citizens to ensure their lived experience is reflected in our policy proposals. We work with many partners on a range of different thematic areas, working closely with academics to generate evidence and campaigners who can drive change. We are independent of all political parties and business, and we are not limited by a single issue or special interest

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The Food Foundation

DESIGN **whitecreativecompany.co.uk**

AUTHORS

Chloe MacKean, Alice English, Indu Gurung, Sarah Buszard, Rebecca Tobi

With thanks to report contributors: Jackie Marshall, Katina Leigh-Taylor, Rachel Claydon

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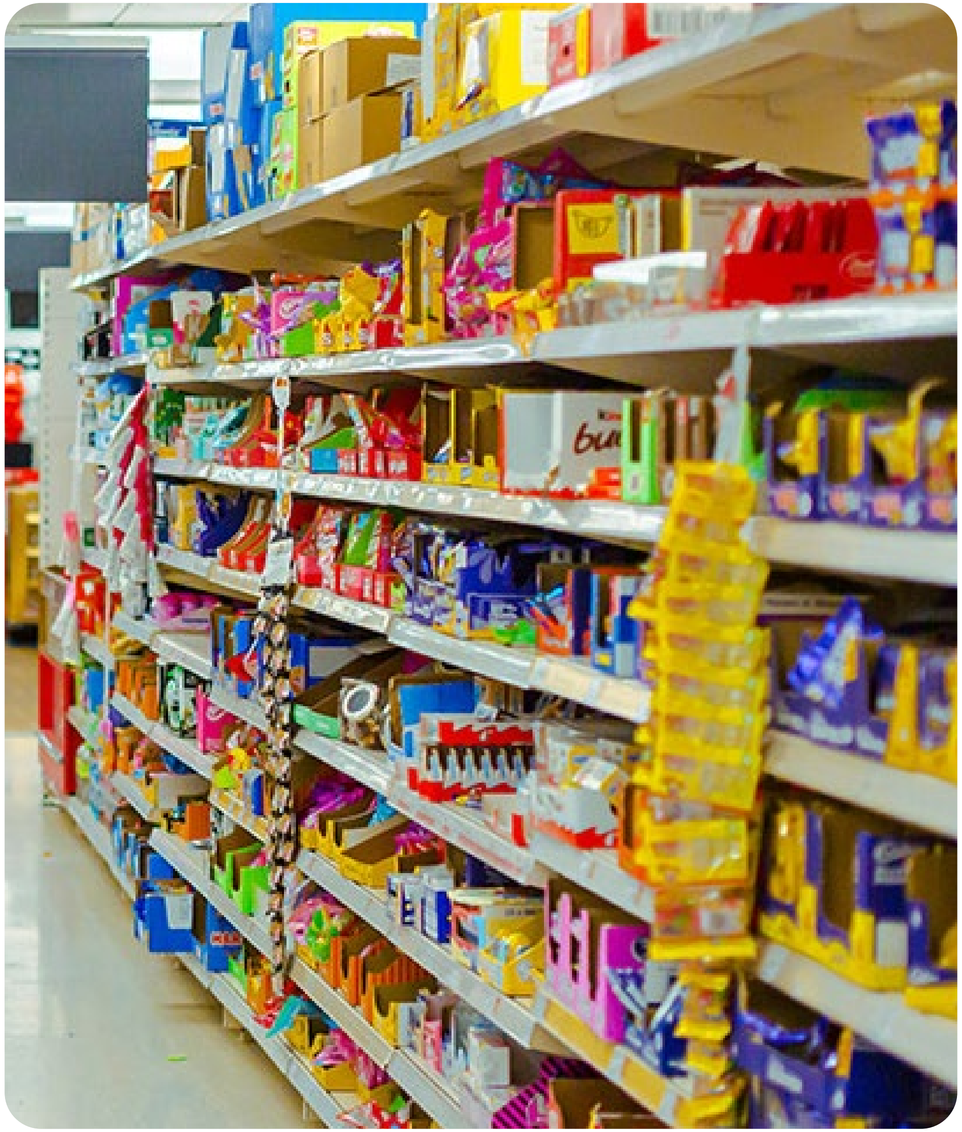


Introduction

THE UK'S FOOD SYSTEM ISN'T WORKING.

It is unsustainable, unhealthy, and unfair. Deep rooted power imbalances mean that profits and power are concentrated in the middle of the food chain, leaving farmers and citizens feeling the squeeze. Among the poorest fifth of the population, households with children would need to spend 70% of their disposable income on food just to afford the government's recommended healthy diet (The Food Foundation, 2024b). Diet, overweight and obesity are now the biggest risk factor for preventable death and disability in the UK (The Food Foundation, 2024c). At the other end of the food chain, growing numbers of farmers and growers are struggling to make a living, with 61% of British farmers saying they are likely to give up their farm in the next 18 months (Riverford, 2024).

Meanwhile, the impact of food businesses on our health and the planet is overwhelming. Obesity and overweight are estimated to contribute to around 40,000 deaths every year and cost the UK economy an estimated £98bn annually (Frontier Economics, 2023). Emissions from the food sector account for a fifth (20%) of the UK's domestic greenhouse gas emissions (GHGEs), but emissions from food have fallen at only half the rate of emissions from the wider economy, meaning that the food sector is now holding back national progress towards net zero (NFS, 2021). Climate change is already impacting on food production, with the cost of food expected to increase by up to 3.2% by 2035 as a result of higher temperatures (Kotz *et al.*, 2024). Business as usual is threatening business sustainability given the very real risks the current model poses for company returns. If food system risks remain unmitigated, individual firms stand to lose up to 26% of their value, with a sector average hit for the food sector as a whole of 7% (Planet Tracker, 2023).

This is arguably an example of market failure - a predictable outcome of a food system where the governing rules mean there is currently little incentive for companies to sell healthy and sustainable foods.

BUT IT DOESN'T NEED TO BE LIKE THIS.

Food businesses shape our food environment, determining not just what types of food are available and accessible to us, but also influencing what we want to eat and what is desirable. UK food businesses have both a tremendous amount of power over the food that is on offer, and deep experience of successfully marketing and selling food to us. This could be harnessed for the greater good, yet they are trapped in a system that rewards the status quo. The lack of regulation to raise standards and create a level playing field means that progressive businesses are limited in how far they can go in a system that makes investment into healthy and sustainable products a commercial risk.

Fixing the system so that it serves wider interests needs bold and urgent action from businesses, but also, crucially, the government, who are ultimately responsible for setting the parameters within which businesses operate. Over the past few years the government has consistently failed to engage with the need to shift our food environments to enable more healthy and sustainable dietary patterns. However, the new mission-led government offers a unique window of opportunity to intervene and enable a new model of business to succeed. Labour must seize this opportunity, and food businesses must support the government in this endeavour. While the window to act is narrowing, it is not yet too late to deliver a food system that works for the next generation—supporting people and planet as well as profit.

METRICS AT A GLANCE

This year's analysis shows that while some businesses are making progress there is still a huge amount of work to be done. Going further, faster, urgently requires government regulation to shift the market as a whole. Concerningly, since last year's analysis, progress in moving to disclose data and set sales-based targets has slowed almost to a standstill for the Out of Home sector (OOH). In contrast, target setting for net zero and Scope 3 emissions is now something virtually all major food businesses do. It cannot be a coincidence that the environment is an area where companies are increasingly obligated to report on their impact, highlighting the need for a similar approach to be taken for health.

SECTORS

Retailers

Out of Home (OOH)

Wholesalers

Manufacturers

SUSTAINABLE DIET FOCUS

Health

Sustainability

At a glance – Key findings

STANDARDS

- Just **seven** of the **36** major UK food businesses benchmarked have moved to disclose data or set new targets for increasing sales of healthy and sustainable food since last year. Restaurant chains and fast food outlets are the least transparent sector by some way, having made no progress since last year.
- Only **one in four** major UK food businesses has a healthy sales target and discloses data on the healthiness of their sales.
- While the majority of major UK food businesses have set targets for reaching net zero and reducing Scope 3 emissions, there is an intention-action gap, with **42%** of businesses not transparently reporting on their progress and almost a **fifth** (17%) having seen their Scope 3 emissions increase rather than fall.
- Of the **eight** global food manufacturers operating in the UK assessed in ATNi (Access to Nutrition Initiative) 2024 Global Index, **three** have no clear and explicit board-level accountability for nutrition (Mondelez, Mars and Coca-Cola).
- Food industry representatives and their trade associations met with Defra ministers a total of **1,377** times between 2020 and 2023. This is over **40** times more meetings than those held between food NGOs and Defra ministers.

AVAILABILITY

- Almost **a third** (30%) of major UK restaurant chains serve main meals where over **half** of the options are concerningly high in salt.
- The majority (**58%**) of main meals served by the UK's major restaurant chains contain meat, although this has fallen since last year (**62%**).

AFFORDABILITY

- Over **1.2 million** people working in the UK's food sector earn below the Real Living Wage. This means they are nearly three times more likely to be earning below the Real Living Wage than workers across the whole economy.
- Retailer progress in ensuring healthy staples are **available** and **affordable** for low income families is not happening at the pace or scale that is needed.
- None of the **20** UK high street restaurant chains surveyed make their healthier or plant-based kids meal deals the cheapest.

APPEAL

- Just **five** companies are responsible for over **80%** of TV ads aired before the watershed for snacks and confectionery, despite all of them claiming not to advertise to children (Haribo, Mars, Mondelez, PepsiCo, Kellogg's).
- Almost **one in five** multibuy offers are on meat and dairy products, with **half** of these offers on processed meat (**10.6%** of all offers). Just **5%** of deals are on fruit and veg.

Standards

Time is running out to avert the climate crisis, while the NHS continues to struggle with the strain of the UK's worsening public health. Only a third of the emission reductions required to achieve the UK's 2030 climate target are currently covered by accredited plans (CCC, 2024). Food companies have a crucial role to play in supporting both public health and climate change targets, but they need systems in place to ensure the health and climate commitments they make are science-based and sufficient. Business transparency around their commitments, and disclosure of their progress against these targets, is critical for focusing businesses (and not just the health and sustainability teams within them) on shifting sales away from less healthy and unsustainable options.

There are a growing number of businesses who recognise the importance of target setting and transparency and, in the absence of government regulation, are setting their own standards. However, the food industry urgently needs a level playing field so that first movers are not penalised commercially.

THIS SECTION COVERS FOUR METRICS:

- METRIC 1 **Business transparency on healthy sales, sales of fruit and veg, and the protein sales split**
- METRIC 2 **Business transparency on net zero and Scope 3 emissions**
- METRIC 3 **Board-level accountability**
- METRIC 4 **Corporate lobbying**

METRIC 7

Business transparency on sustainable and healthy diets

This year's Plating Up Progress analysis finds seven companies have made significant progress since last year in disclosing transparent data and setting targets to support sales of more healthy and sustainable food:

- ★ **Lidl GB** recently set a target for increasing sales of plantbased protein, the first UK food business to both disclose and have a target for their protein split.
- ★ **Bidfood** now report sales-based data across all three of our core diet metrics (except animal protein).
- ★ **Aldi** report on and have set a sales-based target for veg.
- ★ **Marks & Spencer** (M&S) and **Compass Group UK & Ireland** report sales-based data for veg.
- ★ **Ocado** now report sales-based data for two of our three core diet metrics.
- ★ **Waitrose** now report sales based data on their animal protein as well as their plant protein.

No progress has been made in the quick service and restaurant sectors, which continue to lag far behind the retail sector.

WHY IT MATTERS

Good data drives good decision making. Transparent and honest reporting by businesses on the healthiness and sustainability of their sales is crucial for identifying what food is being sold (and ultimately consumed) and pointing to areas for improvement. Setting targets is equally important, serving as a North Star for driving meaningful change within companies.

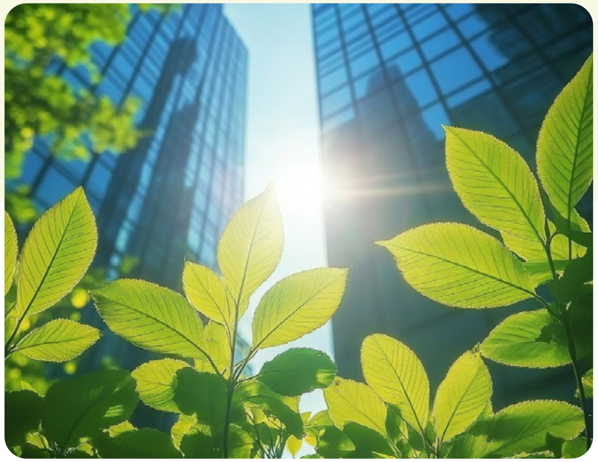
WHAT WE DID

For this section, we focussed on the three key metrics from The Food Foundation's Plating Up Progress benchmark which provide an indication of how healthy and sustainable a company's portfolio is, looking at whether companies disclose and have targets for:

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)**

Plating Up Progress assesses 36 major UK operating food businesses including retailers, the OOH sector, wholesalers and (for the first time this year) manufacturers. This group of companies is responsible for the majority of the food we buy, with over 90% of retail sales funnelled through the supermarkets assessed in our benchmark. Company disclosure and target setting is assessed across a range of health, environment and social metrics. Businesses are assigned scores for each metric based on whether they have a sales-based target and disclose data against the target.

The gold standard for targets and data disclosure are those which are sales-based, as this provides a clear link to consumption. Sales data based on value (£) rather than the volume of food sold can be vulnerable to the impacts of inflation and market volatility. It is not a true reflection of consumer purchases as it does not account for the weight or volume of products sold. Tables 1-3 therefore assess company progress based on whether data and targets are sales-based and measure sales in volume (tonnage). Further information on metrics can be found here, and in our technical report.



WHAT WE FOUND

1. **Nine** (28%) **businesses** have a sales-based target and disclose data for sales of healthy foods vs. less healthy (HFSS) foods, of which eight have a SMART target and one reports sales-based on revenue rather than volume (best practice).

2. **Just four** (11%) **businesses** (all of which are retailers) have a sales-based target and disclose data for fruit and veg sales.

3. **Only one business** (Lidl GB) has a sales-based target and discloses data for both animal and plant protein sales.

Since last year's analysis, only seven companies have set new targets and/or moved to disclose data on sales against our three key metrics.[1] The slow pace of progress we have seen over the past two years has not been helped by the stop-start nature of the Food Data Transparency Partnership (FDTP). Before the election was called, the FDTP's health working group had made notable progress in agreeing a set of key voluntary metrics for businesses to report on. It is crucial the new government continues this work to standardise reporting for large food businesses and moves this onto a mandatory footing. Without this, businesses will remain stuck in uncertainty, with no clear guidance on which metrics to use or how to measure them. It will also remain impossible to accurately compare and contrast how businesses are behaving.

This year's analysis shows very clearly that mandatory reporting of sales portfolios is needed to level the playing field and raise standards across the board, given that the OOH sector is now significantly behind other food sectors in moving to disclose data transparently and set targets for change.

Retailers

Supermarkets remain the top performing sector overall in setting sales-based targets on our three key metrics and reporting on them. Lidl GB has made the most progress within the sector by setting a target to increase the proportion of plant-based protein sales within their total protein volume sales, making them the first UK food business to both disclose and set a target for their protein split. Additionally, Lidl GB is the first business to disclose and set targets for all three of our key metrics, establishing them as clear leaders among the companies assessed in Plating Up Progress. Over the last year, Aldi has introduced a sales-based target and is disclosing data on veg portions in their own-brand products, while M&S has now started reporting on sales of fruit and veg. Ocado has also made commendable progress in moving to disclose sales-based data, and now report both their protein split and sales of fruit and veg.

Out of home

The OOH sector includes contract caterers, casual dining and quick service restaurants (QSR). Within the contract catering sector, Compass Group UK & Ireland remain leaders as they now report on the percentage of veg procured. However, they have not renewed their commitment to increase the amount of veg they procure, which expired in 2022.

Compass Group UK & Ireland still maintain their target to switch from animal-based towards plant-based proteins. Aramark also has a target to offer 44% more plant-based options, though this is a US-based target and not applicable to the UK.

Casual dining is the worst performing sector overall, as none of the businesses have a target or report data on HFSS, fruit and veg or animal and plant-based protein sales.

[1]The Restaurant Group and Iceland's 2023 analysis was used again this year as they have not updated their CSR reports with new data within our timeframe for analysis.

Wholesalers

Bidfood has shown the most progress among the 36 businesses assessed, now reporting sales-based data on almost all three key metrics (they report on plant protein, but not animal). In contrast, Brakes has seen a decline in its score due to the absence of information on fruit and veg sales as well as its protein split.

Manufacturers

Manufacturers have been assessed in our Plating Up Progress benchmark this year for the first time. Both Nestlé and Nomad Foods have committed to increasing sales of healthier foods and report against this target, although Nomad Foods has yet to set a specific target for their commitment and Nestlé's target has been criticised for categorising products with no nutritional value such as coffee as healthy foods (ShareAction, 2024).

Premier Foods has a sales-based target and discloses data on HFSS and plant-based products. Similarly, Unilever has a target and data on plant-based products, but both Unilever and Premier Foods present their data in monetary value (£), rather than as a percentage of sales by volume or tonnage which is considered best practice.

Greencore is the only manufacturer reporting data on both animal and plant protein, although this is based on procurement purchase data rather than sales data. They have also set a target to increase sales of healthier products and are expected to report progress data later in 2024, which would position them as leaders within their sector.

TABLE 1

Companies with a sales-based target and/or disclosing data for sales of healthy/HFSS food

CASUAL DINNG	Company	Target	Disclosure
	JD Wetherspoon	✖	✖
	Mitchells & Butlers	✖	✖
	Nando's	✖	✖
	The Restaurant Group	✖	✖
	Whitbread	✖	✖

CATERERS	Company	Target	Disclosure
	Aramark	✖	✖
	Compass Group UK & I	✖	✖
	Elior	✖	✖
	ISS	✖	✖
	Sodexo	✖	✖

MANUFACTURERS	Company	Target	Disclosure
	Greencore	●	✖
	Mars	✖	✖
	Nestlé	●	●
	Nomad Foods	●*	●
	Premier Foods	●£	●£
	Samworth Brothers	✖	●
	Unilever	✖	✖

QSR	Company	Target	Disclosure
	Domino's	✖	✖
	Greggs	✖	✖
	Burger King	✖	✖
	KFC	✖	✖
	McDonald's	✖	✖
	SSP	✖	✖

RETAILERS	Company	Target	Disclosure
	Aldi	●	●
	Asda	✖	✖
	Co-op	✖	●
	Iceland	✖	●
	Lidl GB	●	●
	M&S	●	●
	Morrisons	✖	✖
	Ocado	●*	✖
	Sainsbury's	●	●
	Tesco	●	●
	Waitrose	●	●

WHOLE-SALERS	Company	Target	Disclosure
	Bidfood	✖	●
	Brakes	✖	✖

* Sales-based commitment but no SMART target
£ = Sales data reported by revenue, not volume

TABLE 2

Companies with a sales-based target and/or disclosing data for sales of fruit and veg

CASUAL DINNG

Company	Target	Disclosure
JD Wetherspoon	✖	✖
Mitchells & Butlers	✖	✖
Nando's	✖	✖
The Restaurant Group	✖	✖
Whitbread	✖	✖

CATERERS

Company	Target	Disclosure
Aramark	✖	✖
Compass Group UK & I	✖	●
Elior	✖	●†
ISS	✖	✖
Sodexo	✖	✖

MANUFACTURERS

Company	Target	Disclosure
Greencore	✖	✖
Mars	✖	✖
Nestlé	✖	✖
Nomad Foods	✖	✖
Premier Foods	✖	✖
Samworth Brothers	✖	✖
Unilever	✖	✖

QSR

Company	Target	Disclosure
Domino's	✖	✖
Greggs	✖	✖
Burger King	✖	✖
KFC	✖	✖
McDonald's	✖	✖
SSP	✖	✖

RETAILERS

Company	Target	Disclosure
Aldi	●	●
Asda	✖	✖
Co-op	✖	●
Iceland	✖	●
Lidl GB	●	●
M&S	✖	●
Morrisons	✖	✖
Ocado	✖	●
Sainsbury's	●	●
Tesco	✖	✖
Waitrose	●*	●

WHOLE-SALERS

Company	Target	Disclosure
Bidfood	✖	●
Brakes	✖	✖

* Two different targets of which only one is reported against, see annex A

† Data consists of other positive ingredients as well as veg

TABLE 3

Companies with a sales-based target and/or disclosing data for sales of animal vs plant protein

		PLANT PROTEIN		ANIMAL PROTEIN	
	Company	Target	Disclosure	Target	Disclosure
CASUAL DINNG	JD Wetherspoon	✖	✖ (% of menu)	✖	✖
	Mitchells & Butlers	✖	✖	✖	✖
	Nando's	✖	✖	✖	✖
	The Restaurant Group	✖	✖	✖	✖
	Whitbread	✖	✖	✖	✖
	Company	Target	Disclosure	Target	Disclosure
CATERERS	Aramark	✖	✖	✖	✖
	Compass Group UK & I	●	✖	●	✖
	Elior	✖	✖ (% of menu)	✖	✖ (% of menu)
	ISS	✖	✖	✖	✖
	Sodexo	✖ (% of menu)	✖ (% of meals)	✖	✖
	Company	Target	Disclosure	Target	Disclosure
MANUFACTURERS	Greencore	✖	● P	✖	● P
	Mars	✖	✖	✖	✖
	Nestlé	✖	✖	✖	✖
	Nomad Foods	✖	✖	✖	●
	Premier Foods	● £	●	✖	✖
	Samworth Brothers	✖	✖	✖	✖
	Unilever	● £	●	✖	✖

		PLANT PROTEIN		ANIMAL PROTEIN	
	Company	Target	Disclosure	Target	Disclosure
QSR	Domino's	✖	✖	✖	✖
	Greggs	✖	●	✖	✖
	Burger King	✖ (% of meals)	✖	✖	✖
	KFC	✖	✖	✖	✖
	McDonald's	✖	✖	✖	✖
	SSP	✖ (% of meals)	✖	✖	✖
	Company	Target	Disclosure	Target	Disclosure
RETAILERS	Aldi	✖	✖	✖	✖
	Asda	✖	●	✖	✖
	Co-op	✖	✖	✖	● £
	Iceland	✖	✖	✖	✖
	Lidl GB	●	●	●	●
	M&S	● £	● £	✖	✖
	Morrisons	✖	✖	✖	✖
	Ocado	✖	●	✖	●
	Sainsbury's	✖	●	✖	●
	Tesco	●	●	✖	●
	Waitrose	✖	●	✖	●
	Company	Target	Disclosure	Target	Disclosure
WHOLE-SALERS	Bidfood	✖	●	✖	✖
	Brakes	✖	✖	✖	✖

% of menu   % of meals

£ = Sales reported by revenue only, not by volume (tonnage) which is best practice
% = Targets set for menu options only, not set for % of sales which is best practice.
P = Purchase data (volume, tonnage) reported, not sales data which is best practice

If businesses were more like…

Lidl GB and **Compass Group UK & I** are the only companies with targets to increase sales of plant-based protein in proportion to animal-based protein. By setting these targets the companies are both driving efforts to shift diets while also reducing their Scope 3 emissions. **Bidfood** has also made substantial progress this year in moving to disclose data about the healthiness and sustainability of their food sales.

What can businesses do…

1 Set healthier and more sustainable sales-based targets and publicly disclose performance annually against these targets.

2 Join other progressive businesses who have been speaking publicly about the need for government to put in place the necessary frameworks and policies required to level the playing field, starting with publicly calling for mandatory reporting of health and sustainability sales data.

METRIC 2

Business transparency on net zero

While the majority of major food businesses have set targets for reaching net zero and reducing Scope 3 emissions, there is an intention-action gap, with **42% of businesses** not transparently reporting on their progress and almost a **fifth** (17%) having seen their Scope 3 emissions increase rather than fall compared to their baselines.

WHY IT MATTERS

In 2023, the average global temperature exceeded 1.5 degrees for the first time on record, with summer 2024 the hottest ever recorded (Climate Copernicus, 2024). September 2022 to March 2024 marked the wettest 18 months England has seen since records began (Independent, 2024). Many farmers were unable to plant crops in waterlogged fields, with an estimated 19% hit to revenues as a result (ECIU, 2024). We have just six years left until 2030, the point at which the UK needs to have reduced 45% of its emissions if we are to reach our target of being net zero by 2050. Globally, the food system is responsible for up to a third of total GHGEs so we will not be able to get there without action from across the food chain.

For food businesses to get to grips with their carbon emissions they must tackle their Scope 3 emissions, as they account for around 90% of their carbon footprint (Defra, 2024). This will have to include reducing the amount of meat and dairy sold given the large footprints associated with livestock production and consumption. For food retailers, meat and dairy make up 51% of all Scope 3 emissions (Madre Brava, 2024).

For food businesses to get to grips with their carbon emissions they must tackle their Scope 3 emissions

Net zero glossary

The GHG Protocol classifies a company's emissions into three scopes:

Scope 1 Direct emissions from owned or controlled sources such as emissions from the company's delivery vehicles.

Scope 2 Indirect emissions from the generation of purchased energy such as the energy required to heat stores.

Scope 3 All indirect emissions that occur in the value chain of the reporting company such as the emissions associated with all foods sold (DESNZ, 2024) (Carbon Maps, 2024).

The Science Based Target Initiative (SBTi) is a global body that demonstrates best practice and provides support and independent verification for businesses who set targets aligned with the Paris Agreement (science-based targets).

WHAT WE DID

We used data captured from our Plating Up Progress analysis to assess the 36 companies included in our benchmark. We looked at whether they had targets for net zero and for Scope 3, and whether these targets were SBTi accredited. To assess progress we looked at whether companies disclosed data on their Scope 3 emissions against a baseline year and compared this baseline figure with the most recent year of emissions data.

WHAT WE FOUND

Food businesses are making much greater progress in setting targets for climate change than they are healthy and sustainable food sales. As shown in Table 4, 34 of the 36 companies assessed in Plating Up Progress have a net zero target (with the exception of Brakes and Nando's) and all of the manufacturing, quick service, and wholesaler companies have a Scope 3 target, followed by 82% of retailers and 80% of caterers and casual dining chains.

This is very likely being driven by the increasing number of corporate reporting directives requiring businesses to publicly disclose data on their environmental impact. UK companies are already required to disclose their Scope 1 and Scope 2 emissions in their annual reports, in line with the Streamlined Energy and Carbon Reporting (SECR) framework. The EU Corporate Sustainability Reporting Directive (CSRD) will start to require disclosures from the largest companies falling within the CSRD's reach as of 2025 (based on 2024 data), including on Scope 3 emissions if they are material (Carbon Trust, 2024; DESNZ, 2023; WRI, 2024c). Non-EU companies that generate less than 150 million EUR on the EU market won't have to report against the CSRD (European Commission).

However, while it is positive to see goals and targets being set, there is an intention-action gap when it comes to companies evidencing that they are actively working to reduce their Scope 3 emissions. Over half of businesses assessed either didn't report progress or saw emissions rise. 42% of businesses assessed are not transparently reporting on their progress; they either do not disclose any data on their Scope 3 emissions and/or do not have a baseline year to report progress against. Worryingly, almost a fifth (17%) of companies overall (from the retail, manufacturing and quick service sectors) have seen their Scope 3 emissions increase rather than fall compared to their baseline year.

An increasing number of government-led reporting directives requiring businesses to publicly disclose data on their environmental impact is driving progress

What can businesses do?

Set SBTi accredited targets for reducing Scope 3 emissions and disclose data on progress annually against a baseline year.

TABLE 4

Companies assessed in Plating Up Progress for target setting and disclosure on greenhouse gas emissions

	Company	Net Zero target	Near term	Long term	SBTi approved	Scope 3 target	Scope 3 Disclosure	Progress against baseline
CASUAL DINING	JD Wetherspoon	✓	✓	✓	All three	✓	✓	^
	Mitchells & Butlers	✓	✓	✓	All three	✓	✓	↓
	Nando's	✗	✓	✗	Near term	✓	✗	
	The Restaurant Group	✓	✗	✗		✗	✓	
	Whitbread	✓	✓	✓	All three	✓	✓	↓
CATERERS	Aramark	✓	✓	✓	All three	✓	✗	
	Compass Group UK & I	✓	✓	✗	Near term	✓	✓	↓
	Elior	✓¶	✗	✗		✗	✗	
	ISS	✓	✓	✗	Near term	✓	✓	↓
	Sodexo UK&I	✓	✓	✓	All three	✓	✓	↓
MANUFACTURERS	Greencore	✓	✓	✗	Near term	✓	✓	↓
	Mars	✓	✓	✓	All three	✓	✓‡	↓
	Nestlé	✓	✓	✓	All three	✓	✓	↓
	Nomad Foods	✓	✓	✗	Near term	✓	✓‡	↓
	Premier Foods	✓	✓	✗	Near term	✓	✓	↓
	Samworth Brothers	✓	✓¶	✗		✓	✗*	
	Unilever	✓	✓	✗	Near term	✓	✗	

	Company	Net Zero target	Near term	Long term	SBTi approved	Scope 3 target	Scope 3 Disclosure	Progress against baseline
QSR	Burger King	✓	✓	✗	Near term	✓	✓	↓
	Domino's	✓	✓	✓	All three	✓	✓	↓
	Greggs	✓	✓	✗	Near term	✓	✓	↑
	KFC	✓¶	✗	✗		✓	✗	
	McDonald's	✓	✓	✓	All three	✓	✓	↑
	SSP	✓	✓	✓	All three	✓	✓	↑
RETAILERS	Aldi	✓†	✓	✓†	All three	✓	✗	
	Asda	✓	✓¶	✗		✗	✓	
	Co-op	✓	✓	✓	All three	✓	✗	
	Iceland	✓	✗	✗		✗	✓	
	Lidl GB	✓	✓	✓	Near term	✓	✓	↑
	M&S	✓	✓	✗	Near term	✓	✓	↑
	Morrisons	✓	✓	✗	Near term	✓	✗	
	Ocado	✓	✓	✓	All three	✓	✓	↓
	Sainsbury's	✓	✓	✓	All three	✓	✗	
	Tesco	✓	✓	✓	All three	✓	✓	↓
	Waitrose (part of john lewis)	✓	✓	✓	All three	✓	✓	↓
WHOLE-SALERS	Bidfood	✓	✗	✗		✓	✓	↓
	Brakes	✗	✓	✗	Near term	✓	✗	

* Company has baseline data only

† Not on SBTi's website but company announced validation via press release

‡ Not a separate Scope 3 target. Includes Scope 1 and 2

¶ Aligned or committed to set a science-based target aligned with the SBTi's criteria

^ No baseline data available.

METRIC 3

Board-level accountability

Of the eight global food manufacturers operating in the UK assessed in ATNi's 2024 Global Index, **three** have no clear and explicit board-level accountability for nutrition (Mondelez, Mars and Coca-Cola).

WHY IT MATTERS

There is currently a mismatch between board ambition and fiduciary duty, and action on climate; and the same is likely to be true for nutrition (Planet Tracker *et al*, 2024). According to a global Climate Governance Initiative and Kantar report, 90% of board directors think it's the board's responsibility to influence their company's direction on climate action and 93% believe their board has the ability to do this. Yet, of the businesses who provide climate disclosures to the (international) Carbon Disclosure Project (CDP), only one in three meet their criteria for having a "climate-responsible" board[2]. This is despite three out of four board members saying that climate change is important to the success of their business. Currently, 26% of boards have no plans to disclose climate information, and 57% have no plans to publish a transition plan in the next year. Yet corporates with a climate-responsible board are 4.8 times more likely to have a 1.5°C-aligned transition plan with a Scope 3 emissions target (CDP & BCG, 2024; CGI & Kantar, 2024).

Boards play a crucial role in moving nutrition and climate action forward within their organisation. If boards and senior management underestimate and fail to address the nutrition and climate risks posed by business as usual, they risk negative impacts on the company's bottom line in the near and longer term (Planet Tracker, 2023). Top-down nutrition and climate leadership from the board is key to it fulfilling its fiduciary duty to protect shareholder value, with accountability and strategic focus likely to filter down throughout the organisation (CDP & BCG, 2024).

WHAT WE DID

For this metric we drew on the research conducted by ATNi (Access to Nutrition Initiative) for their latest Global Index, which assesses the world's largest global food and beverage manufacturers, looking at how they contribute to addressing malnutrition in all its forms. Please refer to the technical report for the full methodology.

WHAT WE FOUND

According to ATNi's 2024 Global Index, of the eight global food manufacturers operating in the UK, three have no clear and explicit board-level accountability on nutrition (Mondelez, Mars and Coca-Cola). The remaining five have board-level oversight of nutrition-related matters which is encouraging to see (Danone, Nestlé, PepsiCo, Kraft Heinz and Unilever).

However, progress generally is slow, and there appears to be a concerning trend of boards delegating

[2] "Climate-responsible" boards are those boards that have oversight on climate matters as well as at least one board member who is climate-competent.

nutrition-related accountability further down within their organisation — for instance to committees — rather than maintaining it at or elevating to overall board-level. Just four of the world's 23 largest global food and beverage manufacturers have made progress since they were last assessed in 2021, by evidencing for the first time that their board reviews nutrition-related matters in some form (Campbell, FrieslandCampina, Keurig Dr Pepper and Yili). And worryingly, six of the 23 companies have changed their board review arrangements since the last assessment, usually by introducing sub-committees with a focus on sustainability or ESG related matters.

Nonetheless, there are promising signs that boards are beginning to deploy a number of strategies to increase focus on climate and nutrition. Some of the positive actions boards are taking include linking climate and nutrition with strategy (in which case overall board-level accountability is required); upskilling board members and personnel; and implementing policies linking climate and/or nutrition performance with remuneration and bonuses. ATNi's latest Global Index found that, of the companies it assesses, ten have now linked executive remuneration with nutrition-specific KPIs, including Danone, Meiji, and Yili who have all introduced this practice since the last Global Index in 2021.

Boards are responsible for promoting the long-term sustainable success of the company and setting the strategy. They have to report annually on how risks and opportunities to the future success of the company have been considered and addressed, the sustainability of the company, and how the governance contributes to its strategy being delivered (FRC, 2024). Sadly, boards are juggling many priorities in a volatile world, meaning that climate and nutrition are at risk of dropping down the priority list. Currently, only a third of board members globally say their boards currently see climate as a high priority. Nonetheless, 86% of boards see climate action as an opportunity for their business, including driving new forms of collaboration (CGI & Kantar, 2024).

If businesses were more like…

Danone. According to ATNi's latest Global Index research, Danone's board of directors regularly reviews progress against its "Health through Food" strategy. Danone also mentions nutrition-related matters specifically in its published lists of matters reviewed and discussed by the board.

What can businesses do…

1 Executive remuneration should be linked to the successful delivery of the company's long-term strategy (FRC, 2024). Businesses can link remuneration and bonuses to performance against health and climate commitments and targets, as Mars has recently done (WSJ.com, 2024).

2 Strengthen board nutrition and climate skills and ensure that at least one board member has specific competencies for nutrition and for climate.

3 Ensure that nutrition and upstream climate and Scope 3 emissions targets are set, and risks are financially quantified; these should then be reported to the board or to a board committee so that progress can be measured and appropriate action taken.

METRIC 4

Corporate lobbying

Food industry representatives and their trade associations met with Defra ministers a total of **1,377 times** between 2020 and 2023. This is **over 40 times more** meetings than those held between food NGOs and ministers.

WHY IT MATTERS

Corporations, organisations and citizens can make their views known to policymakers. It's an essential part of an open and consultative policymaking process which, if done transparently, can empower citizens to participate in the democratic process (Transparency International UK, 2015).

However, food policy is at risk of becoming "pay-to-play", whereby those companies or trade associations[3] with significant revenues can leverage this to access and influence policymakers. A 2024 study of US lobbying using the OpenSecrets database, revealed how, between 1998 and 2020, ultra-processed food (UPF) manufacturers spent US$1.15 billion on lobbying. This was more than any other industry — the second highest was gambling (US$817 million), followed by tobacco (US$755 million) and alcohol (US$541 million) (Chung *et al.*, 2024).

Policy interference is when lobbying by or on behalf of companies is done to influence policy to advance commercial goals and maximise profit from products and practices that may harm the public (ESCR-net). The financial and market power of large corporations has been found to correlate strongly with corporate political activity and political power (Wood, *et al.*, 2023). When it comes to large food corporations, this can translate into governmental stasis in moving to regulate unhealthy products and practices. Countries with a greater degree of corporate capture of the food supply chain have been found to be less likely to implement evidence-based health policies endorsed by the WHO (Allen, *et al.*, 2022).

WHAT WE DID

We conducted rapid research and analysis of ministerial meetings with the UK food industry and their major trade associations as documented on the 'Transparency and freedom of information releases' register on the UK Government website. All lobbying activity across these departments was analysed by assessing 'gifts, hospitality, travel and meetings' documented between 2020 and 2023 for six government departments: the Department of Health and Social Care (DHSC); HM Treasury (HMT); the Department for Environment, Food and Rural Affairs (Defra); the Department for Business, Energy & Industrial Strategy (BEIS)[4]; the Prime Minister's Office (PMO); and the Department for Culture, Media and Sport (DCMS). We pre-identified companies assessed in our Plating Up Progress benchmarking analysis and the largest food and

[3] Trade associations are defined as an organisation of businesses in the same industry or with similar interests that work together to promote the industry and advance their members' interests. We have included membership bodies representing sector interests in our analysis.
[4] BEIS existed until February 2023 when it was split to form the Department for Business and Trade (DBT), the Department for Energy Security and net zero (DESNZ) and the Department for Science, Innovation and Technology (DSIT).

beverage trade associations in the UK, including those for the meat and dairy industry, to search for in the registers. Additional relevant companies and trade associations identified as part of searching the registers were also included in the final analysis. Please refer to the technical report for the full methodology and the list of companies and trade associations included. A more in-depth briefing with the findings of this piece of research will be published in 2025.

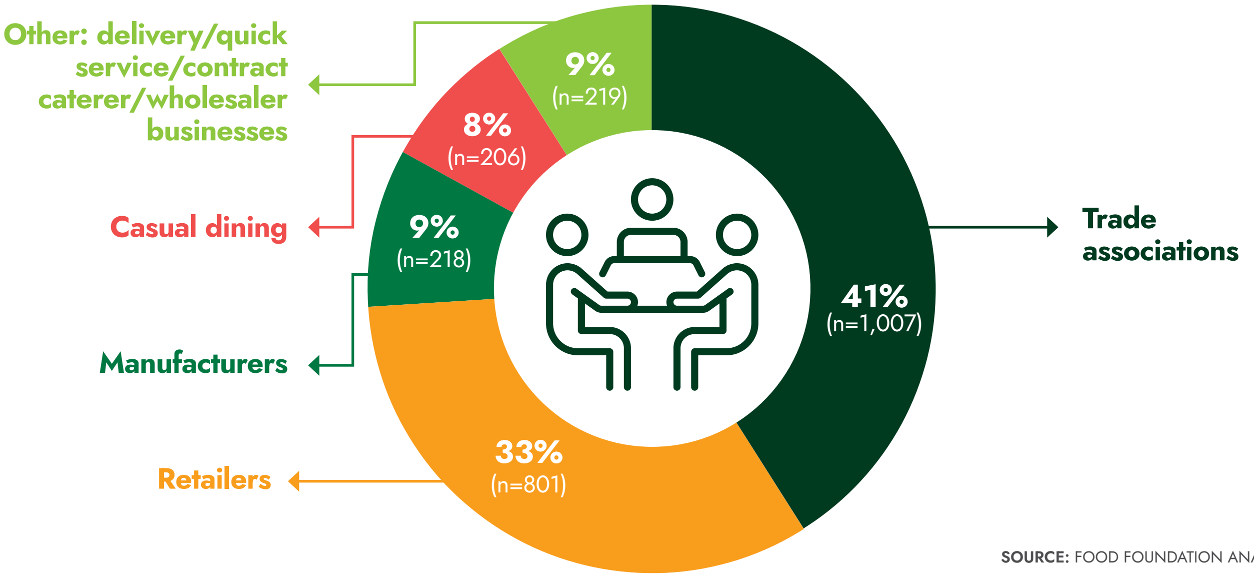
WHAT WE FOUND

Of the six departments we looked at, Defra and BEIS, rather than DHSC, had the largest number of ministerial meetings* with food businesses and their trade associations. **56% and 32% of the total meetings by food businesses for the 2020-2023 period were with Defra and BEIS respectively. Just 3% of meetings were with DHSC**.

When we looked in more detail at Defra, the department responsible for food and farming, we identified a total of 1,377 meetings between food businesses and trade associations – far outnumbering the number of meetings between Defra ministers and food NGOs held during the same period of time (2020-2023) which was just 35. Across all six departments analysed, 41% of the total number of ministerial meetings with the food and drink industry and their representatives were with trade associations (1,007 meetings), followed by 801 meetings with retailers (33%), 218 meetings with manufacturers (9%) and 206 meetings with casual dining businesses (8%).

FIGURE 1

The proportion of food industry meetings by sector with government departments 2020-2023



SOURCE: FOOD FOUNDATION ANALYSIS

Perhaps unsurprisingly, trade associations were overwhelmingly the most active food related organisation in terms of ministerial lobbying. The trade association recording the largest number of official ministerial meetings with our six focus departments was the British Retail Consortium (BRC), with a total of 287 meetings documented between 2020 and 2023. This was closely followed by the National Farmers' Union (NFU) with 279 meetings, and the Food and Drink Federation (FDF) with 211 meetings.

Our research also identified a large number of smaller, livestock-focused trade associations actively lobbying ministers. This raises questions about the influence the meat and dairy industry has on food and agriculture policy development. 40 meetings with meat and dairy trade associations and Defra were recorded between 2022 and 2023 alone. 15% of all trade association meetings with Defra between 2020 and 2023 were with meat and dairy specific trade associations. The highest number of meetings were with the British Poultry Council and the National Sheep, Pig and Beef Associations.

*Both bilateral meetings with ministers and roundtable meetings with multiple companies in the room have been included.

TABLE 5
The 10 companies in our analysis recording the largest number of ministerial meetings overall

	COMPANIES	TOTAL MEETINGS 2020-23
1	TESCO	121
2	Sainsbury's	116
3	M&S	106
4	ASDA	90
5	deliveroo	83
6	Unilever	79
7	Morrisons	65
8	Restaurant Group plc	64
9	McDonald's	62
10	co op	61

TABLE 6
The companies recording the lowest number of ministerial meetings overall

	COMPANIES	TOTAL MEETINGS 2020-23
1 =	aramark	0
2 =	elior	1
2 =	Greencore	1
2 =	Samworth Brothers QUALITY FOODS	1
3 =	General Mills	2
3 =	ISS	2
4 =	Bidfood	3
4 =	brakes a Sysco company	3
4 =	SSP	3

Our research was significantly limited by the lack of information available on public registers documenting interactions between food industry representatives and policymakers. One crucial limitation is the fact that, while ministerial meetings are disclosed, the descriptions of these meetings are minimal. For example, in 2023 approximately a third of food businesses' meetings with Defra were to discuss farming or agriculture policy, challenges or issues. No further detail is provided beyond this very top-level description.

The absence of information about meetings with other public servants, such as senior civil servants who are important conduits for policy influence and obvious targets for lobbyists, is another significant limitation.

The failure to clearly describe and document meetings represents a significant limitation to the current rules. Current transparency rules only apply to meetings that take place within ministries or departments. Meetings held *outside* government buildings – for example, on a corporation's premises, at party conferences, at events – are not logged. Emails, phone calls, and texts are also not disclosed. Consequently, we have no real idea how many interactions may have taken place between food industry lobbyists and policymakers.

If businesses were more like...

Unilever. Unilever recently called on industry associations to increase their efforts on climate action. They have also undertaken an independent review of the industry associations they work with to audit their alignment with Unilever's own position. Their review found that eight out of 27 industry associations had no public record of meaningful climate policy engagement with governments, and eight weren't aligned with one or more of Unilever's priority policy areas. Unilever have stated that they will take action to address the misalignment and that they reserve the right to withdraw their membership if necessary (Unilever, 2024).

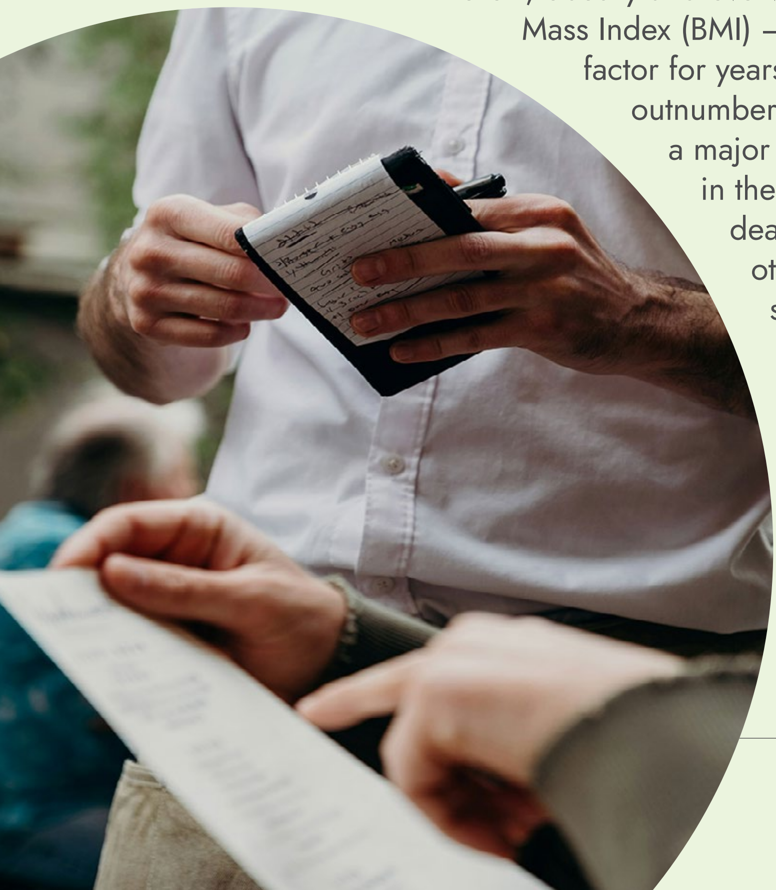
What can businesses (and government) do...

1 The UK should substantially improve the disclosure requirements for meetings between the food industry and policymakers. Registers of meetings should be accessible, easily searchable, and include accurate information on meeting objectives with more detail on issue(s) addressed and regarding what specific policy or legislation. Two countries and one US state – Canada, Ireland and Washington State – offer examples of more robust lobby registers that could be emulated (Lobbying.ie, 2024; Solaiman, 2024).

2 Businesses ought to review their membership of different trade bodies to check for any (mis)alignment of positions and strategy and commit to taking action to address any misalignment in line with the Responsible Lobbying Framework.

Affordability

Non-communicable diseases (NCDs) such as heart disease and type two diabetes are the biggest cause of death worldwide, with unhealthy diets one of the main contributing risk factors (Afshin *et al*., 2019). In the UK, obesity and overweight — or high Body Mass Index (BMI) — is the leading risk factor for years lived with disability, outnumbering smoking. It is also a major contributor to deaths in the UK. In addition to BMI, death and disability from other dietary risks — such as eating too little fruit, veg, and fibre, too much processed and red meat, and foods high in fat, sugar and salt — have risen sharply (by 46%) in the last decade (The Food Foundation, 2024c). Yet large numbers of people in the UK are unable to afford healthy food, with 7.2 million adults in the UK experiencing food insecurity this summer (The Food Foundation, 2024a). Households with children in the poorest fifth of the population would have to spend 70% of their disposable income on food to afford the government-recommended healthy diet.



Food businesses are simultaneously some of the largest employers in the UK, and are the channel through which most people in the UK buy their food. They therefore play a critical role in helping people to afford healthy food and reducing the health inequalities we see in our society because of poor diets.

THIS SECTION LOOKS AT THREE METRICS:

- METRIC 1 **Wages in the food system**
- METRIC 2 **Supermarket support for low-income families**
- METRIC 3 **Meal deals**

METRIC 7

Wages in the food system

Over **1.2 million**[6] people working in the food sector earn below the Real Living Wage. This means they are nearly three times more likely to be earning below the Real Living Wage than workers across the whole economy.

WHY IT MATTERS

Low pay is prevalent across the food system, and many food sector workers are among the 7.2 million adults living in households that experience food insecurity (The Food Foundation, 2024a). Over a quarter (25.8%) of food sector workers reported experiencing food insecurity in January 2024 – a higher number than other key workers in the NHS and education sector (The Food Foundation, 2023a). While the last few years of inflationary turbulence have been tough for many, especially those on low incomes, most of the biggest UK food companies have continued to record healthy profits, with some executives receiving generous pay outs (The Grocer, 2024). This is leading to an increased focus on power imbalances in the food supply chain (The Food Foundation, 2023b).

WHAT WE DID

We analysed ONS data (kindly provided by the Resolution Foundation) to find out how the food sector is doing when it comes to paying adequate wages which take into account the cost of living.

Concerningly, the percentage of workers in Great Britain paid the National Minimum Wage or below, and below the Real Living Wage[7], has slightly increased between 2022-2023; by 0.9% for those earning below the Real Living Wage and 0.1% for those earning the National Minimum Wage or below. Increases have been significantly higher when looking at the food sector, with the percentage of workers paid below the Real Living Wage increasing by 3%, and those paid the National Minimum Wage or below by 1.6%.

[6] 1.27 million
[7] The National Minimum Wage is the statutory minimum wage per hour for the UK (GOV.UK, 2024). The Real Living Wage is a voluntary UK wage rate based on the cost of living (Living Wage Foundation, 2024). Department for Energy Security and Net Zero (DESNZ) and the Department for Science, Innovation and Technology (DSIT).

FIGURE 2

The proportion of food sector workers paid below the Real Living Wage compared to those paid the National Minimum Wage or below in 2023. Based on Resolution Foundation analysis of ONS, Annual Survey of Hours and Earnings 2022–2023.

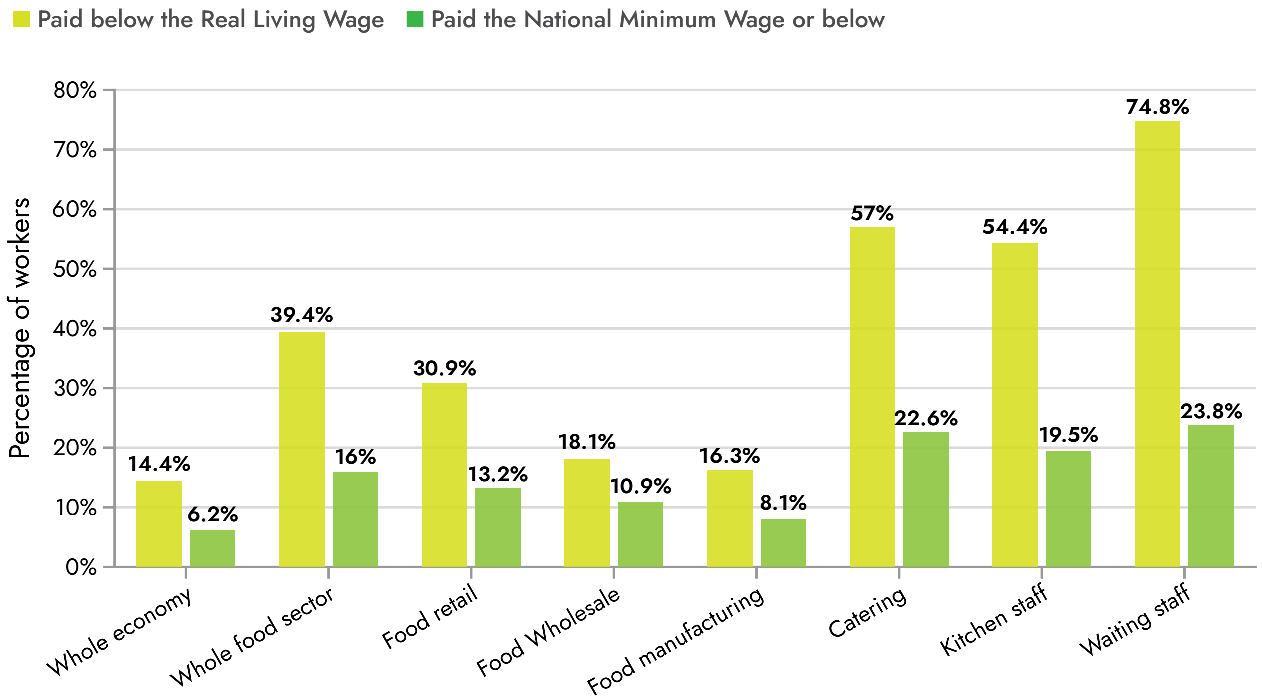


Figure 2 shows the percentage of food sector workers earning below the Real Living Wage is nearly triple (2.7 times higher) that of workers across the whole economy – this equates to over 1.2 million people. The comparison of workers at or below the National Minimum Wage by sector compared to worker across the whole economy follows a similar trend. Within the food sector, the percentage of workers paid below these rates are highest for waiting staff (who are likely to be working in hospitality and the OOH sector), and lowest for food manufacturing.

If businesses were more like…

Two manufacturers, Nestlé and Unilever, hold Real Living Wage accreditation. Of the 36 companies assessed in Plating Up Progress, only 11 (31%) pay the Real Living Wage. These are mostly retailers, though none are formally accredited as Real Living Wage employers.

What can businesses do…

Gain Real Living Wage employer accreditation. It is good news that the government has pledged to work with the Low Pay Commission to ensure the minimum wage is a real living wage that is properly enforced and takes into account the cost of living. However, businesses can more immediately show leadership by accrediting as Real Living Wage Employers, ensuring that all their staff (including third-party contractors) are guaranteed a real living wage.

METRIC 2

Supermarket support for low income families

While progress is being made in ensuring healthy staples are available and affordable, this is not happening at the pace or scale it needs to be across UK supermarkets.

WHY IT MATTERS

Although food price inflation is falling, food prices are still 25% higher than they were two years ago with low-income families bearing the brunt of this (Food Foundation, Basic Basket tracker). Food insecurity affects 18% of UK households with children and 11.7% of households without children (The Food Foundation, 2024a). The cost-of-living crisis is also likely to be impacting on dietary quality, with just under half of households experiencing food insecurity reportedly buying less fruit and vegetables, dairy and oily fish. As a result, it is essential that supermarkets ensure that healthier foods are priced affordably and available across all their stores.

WHAT WE DID

The Food Foundation's Kids Food Guarantee (KFG) is a set of actions which retailers (and manufacturers) should have in place as a minimum to support lower income families to access and afford healthy staples.

Using data captured in-house or provided by our partners Questionmark Foundation, an international non-profit think tank, we have been continually monitoring retailer progress against the KFG areas since April 2023. We look at retailer progress and performance against the following areas: multibuys and price promotion deals, fruit and vegetables, staple carbohydrates, first infant formula, children's lunchboxes, yogurt and cereals, and the Healthy Start scheme.

Further details on our methodology can be found in our KFG technical report. Our dashboard with data, graphs and reports can be found here.

WHAT WE FOUND

Across the Guarantee areas monitored over the past year, we find that progress and performance are inconsistent, varying both by retailer and by Guarantee area. Across the sector there is scope for retailers to improve the pricing and availability of healthy essentials.

- **1 in 7 (14%) of the lowest priced fruit and veg products across the seven major retailers contains added salt and/or sugar.**
- **Over a quarter (27%) of multibuy deals are on HFSS food and drink,** while just 4% of multibuy deals are on fruit and vegetables and 3% on staple carbohydrates. For price promotions, 41% of offers are on HFSS foods and just 3% of promotions on fruit and veg.
- **Just 1 in 6 (16%) of all bread, rice, pasta and noodle products are wholegrain, wholemeal, brown or 50:50.** In all four categories the price of wholegrain and brown products are on average higher than the closest comparable white product for the cheapest ten products. The largest price differences can be seen in the rice category; brown or wholegrain rice options

cost an average of 83p more per 100g than white rice.

- **Data from October 2024 found that the most expensive first infant formula on the market (Co-op's Aptamil 1 First Infant Milk From Birth 800g) is twice as expensive as the cheapest first infant formula available** (Aldi's Mamia brand 800g), despite all first infant formulas being nutritionally comparable.
- **We found only 3.7% of single portion yogurt pots on sale in the five largest supermarkets are plain, unsweetened yogurt** (just 14 products in total). These also come with a price premium, costing on average 26% more than sweetened and flavoured yogurts despite being the best choice for young children.
- **The cost of products that could make up a healthy lunchbox is higher than for comparable but less healthy lunchbox items**. Across all five major retailers the unhealthy packed lunch was significantly cheaper than the healthiest. Aldi had the biggest discrepancy, with the healthy lunchbox being 77% more expensive than the less healthy packed lunch.

Figure 3 summarises retailer performance across the Guarantee areas monitored. Overall, Tesco perform most strongly in supporting low income families to access and afford healthy staples, while Morrisons is the weakest.

FIGURE 3

Overview of retailer performance within each Guarantee area

Guarantee area	Aldi	Asda	Co-op	Iceland	Morrisons	Ocado	Sainsbury's	Tesco	Waitrose
Fruit and veg guarantee									
Availability of fruit and veg	↑	↑	↓	↓	↓		↑	↑	
Added sugar/salt in fruit and veg	↑		↓		↑		↓	↑	
Staples guarantee									
Mulitbuys					↓			↑	
Price Promotions*	↑						↓	↓	
Wholegrains	↓	↑	↑	↓	↓		↑		
First infant formula	↑	↓	↓	↑		↓			↓
Kids categories guarantee									
Yoghurt	↓	↑					↑	↑	
Cereal							↑		
Lunchbox guarantee					↓		↓	↑	
A healthier, more sustainable future									
Healthy Start	↓	↓	↑	↑			↑		

↑ Leader ↓ laggard ▢ Not curently monitored for this Guarantee area

For those Guarantee areas where performance was not monitored for all nine of the largest UK supermarkets, retailers omitted from the review process have been shaded grey. The red and green highlighting of retailer names (Tesco and Morrisons) denotes the retailers who overall, across all Guarantee areas monitored so far, hold the highest number of leader or laggard positions. Although Sainsbury's perform strongly across a number of Guarantee areas they are not marked as overall leaders given their higher number of laggard positions.

***Full details of retailer performance on price promotions can be found in our January 2024 report [here]**

What can businesses do...

1 **Promote the Healthy Start Scheme**. Actions to support increased uptake could include; labelling foods included within the scope of Healthy Start with information about the scheme, running targeted in-store and/or online communication campaigns to promote the scheme to low income customers, and exploring the potential to use loyalty card schemes to incentivize the use of funds on healthy foods.

2 **Offer a healthy children's lunchbox meal deal**. Retailers should look to offer lunchbox items that are compliant with School Food standards and make up five lunches that can be bought at affordable price point, for example through a multibuy deal. No retailer currently has such a meal deal but this would go a long way to helping time-poor families on tight budgets to provide their children with a healthy packed lunch.

If businesses were more like...

Tesco. Tesco holds the highest number of leadership positions overall. Driven by their healthy sales target and better baskets initiative, Tesco perform strongly on the pricing and availability of healthy basics such as fruit and veg and recently launched a new kid's size plain yogurt multipack. They have also consistently been the most economical place to purchase a healthy packed lunch.

METRIC 3

Meal deals

None of the **20** UK high street restaurant chains surveyed make their healthier or plant-based kids meal deals the cheapest.

WHY IT MATTERS

There are no financial incentives for families to choose a more environmentally sustainable and healthy kids meal.

Meal deals are widely available from both supermarkets and the OOH sector. Cross-product price promotions (including meal deals) are a powerful tactic for influencing consumers' purchasing decisions and so the nutritional quality and environmental profile of these deals matters, particularly in a cost-of-living crisis.

In the quick service sector, meal deals are widely reported to have risen in prevalence with McDonald's recently announcing a global push on promotions (The Grocer, 2024a). Amongst retailers too, the rise of the 'food to go' category is being driven in part by customer demand for quick meal options during the cost-of-living crisis. A recent systematic review of out of home purchases (which included 'food to go' sections in supermarkets) found that food to go from supermarkets, along with fast food, represent half of all out of home calories purchased (Nesta, 2024a).

Manufacturers producing own-brand products for supermarkets have also seen growth thanks to the increased sales of sandwiches from supermarkets' 'food to go' category. According to Greencore, over half of sandwiches sold by supermarket chains are bought as part of a meal deal (Grocery Gazette, 2023).

WHAT WE DID

For this metric we looked at 20 of the biggest UK high street restaurants to understand which chains are offering healthy and sustainable options as part of their meal deals and how these are priced. Using data collected through the Soil Association's 'Out to Lunch' programme, we looked at which restaurant chains offered meal deals on healthy and plant-based (meat and dairy-free) dishes for children. Businesses were scored based on whether the healthier or meat and dairy-free options on their kids' meal deals were cheaper, the same price, or more expensive than unhealthy or meaty dishes. The Soil Association and The Food Foundation also analysed kids' meal deal menus to understand the proportion of options that were meat-free, as well as how veg is incorporated into, and promoted, within menus.

For the retailers, we enlisted the help of Young Food Ambassadors from The Food Foundation and Bite Back, to visit stores and review how many healthy and sustainable options were available as part of lunchtime meal deals (the main meal, side and drink).

WHAT WE FOUND

None of the 20 major UK high street chains surveyed make their healthier or plant-based kids meal deals the cheapest. Healthy meal deal options were the same price as unhealthy options (defined as those including no veg, fruit or salad, high in sugar and/or including fried food) at all of the outlets surveyed, with vegetable side dishes often optional. While it is positive that families are not being penalised for choosing more healthy options, there is equally no financial incentive to choose a healthier meal.

Similarly, despite the often lower cost to restaurants of procuring plant-based ingredients and foods compared to meat and dairy, all meals deals are priced the same regardless of whether they are meat-free or not – again providing no financial incentive to choose a more environmentally sustainable meal.

A number of chains reported that their healthier and sustainable options are often not the most popular in terms of purchases, which suggests there are opportunities to improve how these options are presented and promoted to boost their appeal.

Several restaurants surveyed have made commitments (through The Food Foundation's Peas Please project) to include two portions of vegetables within each kids' meal. However, in many cases, the veg is included as a side, with the option to switch it for a less healthy side. When the meal deal involves choosing either veg or a typically more appealing side, like chips, this may disadvantage the veg option.

TABLE 7
Proportion of non-meat options within each restaurant's children's menu, as assessed by the Soil Association.

	% of kids menu meat-free*
Bella Italia	75%+
Carluccio's	75%+
Frankie & Benny's	50%+
Harvester	50%+
Hungry Horse	50%+
J D Wetherspoon	50%+
Pizza Hut	50%+
Prezzo	50%+
Wagamama	50%+
Wahaca	50%+
Zizzi	50%+
Leon	50%+
Brewers Fayre	50%+
Franco Manca	50%
Toby Carvery	50%
McDonald's	<50%
Nando's	<50%
Pizza Express	<50%
TGI Fridays	<50%
KFC	0%

When it comes to the environmental impact of kid's meal deals, Bella Italia and Carluccio's menus had the highest proportion of meat-free menu options, while KFC meal deals did not include any non-meat options at all.

Examples of positive restaurant action identified included:

- Frankie & Benny's and TGI Fridays serve a pot of veggie sticks with every kid's meal (rather than vegetable sides being optional).
- Harvester and Pizza Hut offer unlimited salad with every kid's meal deal, and Toby Carvery offer unlimited veggies and potatoes from the carvery deck.
- Harvester promotes their meat-free options with enticing, child-friendly language, such as its "Veggie Rainbow Lasagna".

The Food Foundation and Bite Back Young Food Ambassadors completed a snapshot survey of supermarket meal deals across the UK throughout August and September 2024 to find out how many healthy and plant-based main options were available within supermarket lunchtime meal deals. They found a huge range of availability across the 17 stores they visited. Access to good-value, healthy and sustainable options for lunch remains a lottery.

The number of meat, fish, egg and cheese-free options within deals on supermarket shelves ranged from zero to 13. The number of main options with at least two green traffic lights and no red traffic lights ranged from one to 26. All supermarkets surveyed did however offer fruit as an option for the snack component of the meal deal, and 65% also offered veg crudities.

If businesses were more like...

JD Wetherspoon. The Wetherspoons kids' menu encourages healthy choices by having a fruit or fruit-based dessert as standard, with ice cream at an extra cost. The "smaller appetites" and pizza menus all include one or two portions of veg, while the "larger appetites" menu includes a compulsory choice of one veg and one potato side dish. The menu is also more than 50% meat-free.

What can businesses do...

1. While simple, uniform pricing of meal deals is part of their appeal, there is an opportunity for outlets to include lower prices on healthier and more environmentally sustainable options within meal deals to make them more financially appealing to customers. This may also offer cost-savings for businesses when meat is being substituted for veg or beans.

2. Vegetable options within meal deals should be automatically included rather than being optional.

3. Retailers and restaurants ought to encourage uptake of plant-based options by including these within meal deal offerings to widen the appeal of plant-based options (WRI, 2024).

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 a higher proportion to unhealthy and unsustainable food.

Healthy dietary patterns that are also associated with low levels of GHGEs include substantially more fruits, vegetables, wholegrains, nuts, pulses and legumes than are currently eaten on average in the UK (BDA, 2020; National Food Strategy, 2021b). They also include less meat – particularly red and processed. The independent National Food Strategy for England recommended a 30% reduction in UK meat consumption by 2032 in order to meet both climate and health goals, and the Climate Change Committee has recommended the UK reduce meat consumption by at least 20% by 2030 and 35% by 2050 to remain on track to meet climate targets (National Food Strategy, 2021).

As well as ensuring healthier options are more widely available, businesses also need to rebalance their food offering so that plant-rich, meat-free options are also readily available in all food outlets in order to meet both climate and health targets.

THIS SECTION HAS TWO METRICS:

METRIC 1 **Meaty menus** METRIC 2 **Healthy menus**

METRIC 7

Meaty menus

The majority (**58%**) of main meals served by the UK's major restaurant chains contain meat, although this has fallen since last year (**62%**).

WHY IT MATTERS

With 2030 fast approaching, businesses need to do more to meet their net zero targets. Given the contribution of livestock production and consumption to GHGEs, it will not be possible for food businesses to reduce their Scope 3 emissions without reducing their animal-based food sales. Studies find that saturating the food environment is effective for boosting sales of plant-based food (Parkin & Attwood, 2022) suggesting that the environmental impact of the food service sector can be minimised by using simple and scalable menu design approaches which nudge consumers towards less meaty choices.

WHAT WE DID

This metric looks at the relative availability of dishes containing meat compared to plant-based options. In last years' report we looked at the availability of meat vs meatless main meals on OOH sector menus. We repeated the analysis with data from 2023, provided by the University of Cambridge (Huang *et al.*, 2022), to see if there had been any changes in the ranking of least and worst offending restaurants. The data was gathered from the menus of 78 of the UK's major restaurants, including casual dining and quick service establishments (such as cafes, restaurants, pubs, cinema chains and takeaways). Of the 78 companies analysed, 14 have been discounted because they did not offer main meals, or offered fewer than 10, or their data was incomplete. The full list of these companies and the rationale for excluding them is in the technical report.

To track changes over time we again examined main meal offerings in this year's analysis. However, this time we also looked at sides and sharers in addition to main meals, given that meals eaten in restaurants can often consist of more than one dish. For full details of menu items that were included and excluded, please see the technical report.

WHAT WE FOUND

Of the 63 businesses included in our analysis we found that 58% of main meals contain meat whereas only 33% are meatless. The remaining 9% of dishes contain fish. This represents a positive shift in reducing the heavy meat focus of menus compared to 2022, when 62% of menu options contained meat. When we included mains, sides and sharers in our analysis, 49% of dishes contain meat and 43% are plant-based suggesting that sides and sharers tend to be more plant-based than main meals (see Annex B for company performance when mains, sides and sharers were included in analysis).

Chicken Cottage's menu is the worst performing for the second year running in terms of plant-based options, with 100% of its main dish offerings containing meat and zero plant-based options available. When the ranking included main meals, sides and sharers, it still ranks worse for availability of plant-based options. Joe & the Juice consistently ranks as the best performing, with the highest percentage of meat-free main dishes on its menu – 69%. This is the same when considering mains, sides and sharers.

Quick service restaurants are the worst offenders, with the top three highest percentage of meat dishes on menus found in this sector (both when looking only at mains, and mains, sides and sharers).

Eight of the 13 chains which ranked highest for the percentage of main meals containing meat this year, also ranked highest in last years' analysis. These are Chicken Cottage, KFC, Gourmet Burger Kitchen, Walkabout, McDonald's, Domino's, Honest Burgers and Wimpy.

TABLE 8

Companies with the highest percentage of dishes containing meat (main meals only)

	COMPANIES	(%) MEAT
1	Chicken Cottage	100
2	Burger King	88
3	KFC	87
4	Gourmet Burger Kitchen	83
5=	Walkabout	81
5=	McDonald's UK	81
6	Domino's	75
7=	Honest Burgers	73
7=	Wimpy	73
7=	Table Table	73
8	Tim Hortons	70
9	Wasabi	69
10	Brewers Fayre	68

TABLE 9

Companies with the highest percentage of meatless dishes (main meals only)

	COMPANIES	(%) MEATLESS
1	Joe & The Juice	69
2=	Coffee #1	62
2=	Soho Coffee	62
3	Sainsbury's Cafes	59
4=	Cookhouse & Pub	57
4=	Pizza Express	57
5=	Pure.	56
5=	Crussh	56
6	Toby Carvery	54
7=	Bill's	52
7=	Taco Bell	52
8	Caffè Nero	50
9	Pizza Hut	49
10=	Bella Italia	47
10=	Pret A Manger	47

What can businesses do...

1 Increase the ratio of plant-rich to meat-rich options on menus. Research carried out for the WRI Playbook 2.0 (WRI, 2024a) showed that aiming for a 75% meat-free menu was the optimum threshold for encouraging uptake of plant-rich meals. At this level, plant-rich options were chosen around 50% of the time.

2 Businesses can also look at their meat heavy dishes and reduce the amount of meat within each dish. This can be done by reducing the amount of meat dishes overall (e.g. if there are two steak dishes, include just one on menus), or reducing the meat content of dishes like lasagna by blending with beans or veg. A 'less meat' approach can also offer opportunities to focus on 'better meat' sourced to higher environmental and welfare standards (WRI, 2024b).

METRIC 2

Healthy menus

Almost **a third** (30%) of major UK restaurant chains serve main meals where **over half** of the options are concerningly high in salt.

WHY IT MATTERS

With more people eating more meals outside their homes more often, the OOH sector wields a large amount of influence over our diets. Cafés and quick service restaurants are easy places to pick up food during a busy day, takeaways 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 on average 21% more calorie dense than meals cooked at home (Nesta, 2023) and an estimated 20-25% of all calories consumed are eaten out of the home (DHSC, 2020). For many, meals eaten out are no longer an occasional treat, but a major source of energy and nutrients, and shape dietary patterns (Nesta, 2024).

WHAT WE DID

In last years' report we assessed the nutritional quality of menus from the UK's major café's, high street restaurant chains, pubs/bars and quick service restaurants using data provided by The University of Cambridge (Huang *et al.*, 2022). This year we repeated the analysis with data from 2023 to see if there had been any changes in the ranking of restaurants. This year 47 companies were assessed. The full list of the companies can be found in the technical report.

This year we looked at main meals, sides and sharers, acknowledging the fact that a main meal can consist of more than one dish. For full details of menu items that were included and excluded, see the technical report.

For the four nutrition indicators assessed (calories, saturated fat, salt and sugar), we ranked the ten worst performing restaurants based on the proportion of their main meal offerings that exceeded 50% of the recommended daily intake for adults (RDI).

WHAT WE FOUND

Salt remains the nutrient which OOH sector meals are particularly high in. **This year, just under a third of the restaurants assessed (14 of the 47) have more than half of their main meals exceeding 50% of the Recommended Daily Intake (RDI) of salt**. This has fallen to 30%, compared to 48% in last year's analysis, suggesting the OOH sector is actively and rapidly reformulating menus, but remains concerningly high.

Businesses that appear in the top ten worst performing restaurants for more than one nutritional indicator have been highlighted in pale orange, while those that are worst performing for three indicators are highlighted in dark orange. To showcase businesses that ranked in the top worst performing 10 for the same indicator last year and have subsequently made little progress, an asterisk (*) has been placed next to their names.

TABLE 10

Percentage of main meals exceeding 50% of the Recommended Daily Intake for macronutrients across our four nutrients of concern

	BUSINESS	SECTOR	% of meals containing > 50% of recommended DAILY CALORIES
1	Tank and Paddle*	Pubs/bars	44%
2	Stonehouse Pizza & Carvery	High street restaurants	42%
3	Greene King	Pubs/bars	32%
3	Nicholson's	Pubs/bars	32%
4	Flaming Grill Pub Co.*	Pubs/bars	31%
5	Sizzling Pubs*	Pubs/bars	30%
6	Toby Carvery*	High street restaurants	29%
7	Harvester*	High street restaurants	28%
8	Vintage Inns	Pubs/bars	26%
9=	O'Neill's	Pubs/bars	25%
9=	Town, Pub & Kitchen	Pubs/bars	25%
9=	Table Table	High street restaurants	25%
9	Brewers Fayre	Pubs/bars	25%
10	J D Wetherspoon	Pubs/bars	24%

	BUSINESS	SECTOR	% of meals containing > 50% of recommended DAILY SUGAR INTAKE
1	Honest Burgers*	High street restaurants	59%
2	Nicholson's	Pubs/bars	53%
3	Stonehouse Pizza & Carvery	High street restaurants	44%
4	Vintage Inns	Pubs/bars	43%
4	Coffee #1	Cafés	43%
5	Tank and Paddle	Pubs/bars	41%
6	Sizzling Pubs*	Pubs/bars	40%
7=	Harvester	High street restaurants	39%
7=	Ember Inns	Pubs/bars	39%
8	Town, Pub & Kitchen	Pubs/bars	38%
9	Gourmet Burger Kitchen*	High street restaurants	37%
10	O'Neill's	Pubs/bars	36%

	BUSINESS	SECTOR	% of meals containing > 50% of recommended DAILY SAT FAT INTAKE
1	Tank and Paddle*	Pubs/bars	78%
2	Gourmet Burger Kitchen*	High street restaurants	63%
3	Toby Carvery*	High street restaurants	49%
4	Greene King*	Pubs/bars	46%
4	Vintage Inns	Pubs/bars	46%
5=	Stonehouse Pizza & Carvery*	High street restaurants	45%
5=	Pieminister	QSR	45%
5=	Nicholson's	Pubs/bars	45%
6	O'Neill's	Pubs/bars	44%
7	Taco Bell	QSR	40%
8=	Flaming Grill Pub Co.*	Pubs/bars	39%
8=	Browns	High street restaurants	39%
8=	Table Table	High street restaurants	39%
9=	Brewers Fayre	Pubs/bars	38%
9=	Ember Inns*	Pubs/bars	38%
9=	Sizzling Pubs	Pubs/bars	38%
10	All Bar One	Pubs/bars	36%

	BUSINESS	SECTOR	% of meals containing > 50% of recommended DAILY SALT INTAKE
1	Tank and Paddle*	Pubs/bars	93%
2	Pizza Express	High street restaurants	89%
3	Gourmet Burger Kitchen*	High street restaurants	80%
4	Nicholson's	Pubs/bars	73%
5	Honest Burgers*	High street restaurants	71%
6	Taco Bell	QSR	67%
7	O'Neill's	Pubs/bars	63%
8	Flaming Grill Pub Co.	Pubs/bars	60%
9	Sizzling Pubs*	Pubs/bars	59%
10	Vintage Inns	Pubs/bars	58%

Pubs and bars make up the majority of the worst-offending restaurants, the same as in last year's analysis. Nicholson's, O'Neill's, Sizzling Pubs, Tank and Paddle and Vintage Inns all exceeded 50% of the RDI for all nutrients of concern, while Stonehouse Pizza & Carvery and Flaming Grill Pub Co exceeded 50% for three macronutrients. Tank and Paddle are still the worst performing business overall, with the highest percentage of meals containing more than 50% of the RDI for calories, saturated fat and salt. The results are substantially similar when sides and sharers are included, despite many OOH companies pointing to sides as an example of healthier options. See Annex C for company performance when mains, sides and sharers were included in analysis.

Interestingly, despite many smaller OOH companies citing their size and lack of resource as barriers to progressing on nutrition, all top ten worst-performing ranking companies we identified are owned by larger groups. Five of the brands appearing in the top ten worst-performing ranking for three indicators are owned by Mitchells & Butlers, Tank and Paddle is part of Stonegate Group, and Flaming Grill Pub Company is part of the Greene King group. Mitchells & Butlers is one of the companies assessed in Plating Up Progress and perhaps unsurprisingly, has no sales-based target and discloses no data on sales of HFSS vs. non-HFSS products.

Overall, pubs and bars perform worst across the four nutrition indicators. The leading OOH sub-sector is quick service restaurants, with the largest number of businesses that rarely or never exceed 50% of the RDI for calories, salt, sugar and sat fat. Benugo, KFC, Pizza Hut, Subway and Tortilla were the best performing as they ranked most strongly across at least three nutrient indicators.

What can businesses do.....

1 **Disclose data and set sales-based targets for increasing sales of healthier foods**. The OOH sector (with the exception of caterers) currently lags well behind the retail sector when it comes disclosing healthy sales data and setting targets to increase sales of healthier foods.

2 **Review menus**, but also explore where options can be reformulated and look at reducing portion sizes to make popular options healthier without customers having to change their usual orders (Nesta, 2024a).

Appeal

People are constantly confronted with advertising for less healthy food and drink on social media, online, TV and outdoors (ASA, 2018). Evidence shows that food marketing is associated with significant increases in food intake, choice, preference and purchase requests (Boyland *et al.*, 2022). Advertising and promotion are the white noise that form the backdrop to our cultural, social and individual attitudes towards food, yet it is heavily skewed towards promoting less healthy food.

It takes consumers just 5-10 seconds to make a purchasing decision (FSA, 2023). What we see in front of us — whether it's the way a dish has been described on a menu, or the bright and eye-catching packaging on a supermarket shelf — impacts our purchasing habits. Thankfully, there are a number of actions manufacturers, retailers and OOH businesses can take to ensure that healthy and sustainable food options are more appealing to consumers.

THIS SECTION LOOKS AT TWO METRICS:

METRIC 1
Advertising by brands to children

METRIC 2
Multibuys on processed meat

METRIC 7

Advertising by brands to children

Just **five** companies are responsible for over **80%** of TV ads for snacks and confectionary aired before the watershed, despite all of them claiming not to advertise to children (Haribo, Mars, Mondelez, PepsiCo, and Kellogg's).

WHY IT MATTERS

Research consistently shows that adverts serve as a stimulus for triggering food cravings and can encourage an increase in how much food is eaten, particularly among children (Norman *et al.*, 2016). There is strong evidence that food marketing affects children's food purchases both at a food category and at a brand level (Coleman *et al.*, 2022). For this reason, it's concerning that advertising is currently skewed towards less healthy foods and drinks. Moreover, children in deprived areas are exposed to more HFSS advertising than those in less deprived areas (Yau *et al.*, 2021).

WHAT WE DID

This metric looks at the number of confectionery and snack TV adverts broadcast over the period July-August 2022. The data was kindly provided by University of Liverpool, who obtained it from Overnights TV, a Broadcaster Audience Research Board (Barb). The dataset included information on advert length, channel, date and time of broadcast, as well as the brand and their holding company for 76 channels with any child viewers aged 5-16 years. 'Television rating' (TVRs) and 'impact' were also provided (see Annex D). For our analysis we focussed on the adverts aired between 5:30am to 9pm (before the 9pm watershed). This aligns with the timing in the UK's upcoming regulation for advertising HFSS food and drinks on TV (planned for Oct 2025). Further detail including inclusion and exclusion criteria can be found in the technical report.

WHAT WE FOUND

From July to August 2022, nearly half (49%) of all confectionery and snacks advertisements were broadcast before the watershed (between 5:30am and 9pm), a timeframe during which children are more likely to watch TV. 13 food and beverage companies had snack and confectionary ads aired during this period, with just five companies accounting for over 80% of the total. Haribo accounts for the largest share of adverts (25%), followed by Mars UK (20%) (table 11).

Despite this, all five of the companies with the largest proportion of snack and confectionary adverts aired before the watershed have marketing policies which say they do not advertise to kids.

- Haribo Corporate Responsibility Report states that "*Haribo does not advertise in any media primarily directed to children under 16 years*".
- Mars UK adheres to the Mars Global Marketing Code for Human Food which states, "*We will not market to children under 13 years because, based on the scientific evidence we believe they cannot identify and understand the persuasive intent of advertising.*"
- Mondelez has a Marketing Policy to Children which says they "*do not advertise our products in any media primarily directed to children under age 13. Our policy*

covers any advertising where 30% or more of the total viewing audience is under the age of 13".

- Pepsico UK Responsible Marketing policy states "*we do not promote or market HFSS products to under-16s across any media*".
- In 2022, Pringles was owned by Kellogg Company. It was subsequently owned by Kellanova in Oct 2023, and has been acquired by Mars in a deal expected to complete in 2025. Their Responsible Marketing policy says "*we do not market to children under 6, and we only market products that meet strict nutrition criteria to children ages 6-12.*"

The discrepancy between these company commitments and the large number of ads aired before the watershed suggests there is a disconnect between their marketing policies and what happens in practice. Even where ads or media are not explicitly targeting children, the timing of these adverts coincides with those times when children are more likely to be watching TV, and are likely to be exposing children to HFSS product advertising.

The new government recently confirmed restrictions on the advertising of HFSS **product** advertising on TV, both broadcast and on-demand (before 9pm), as well as a blanket ban online which will come into effect on 1st October 2025. This is a positive step forward. However, the exclusion of **brand** advertising from these restrictions risks businesses simply shifting spending into non-specific advertising that still promotes brands synonymous with unhealthy food and drink. Outdoor advertising has also been excluded from the forthcoming restrictions.

TABLE 11

Companies that had the highest number of adverts for confectionary and snack adverts shown before the watershed

TOP 5 HIGHEST	HOLDING COMPANY		% OF ADVERTS SHOWN
1	Haribo		25.0%
2	Mars UK		20.2%
3	Mondelez UK		15.8%
4	Pepsico		13.7%
5	Kellogg's		7.9%

*At the time of the research July-August 2022, Pringles was owned by Kellogg Company. It was subsequently owned by Kellanova in Oct 2023, and has been acquired by Mars in a deal expected to complete in 2025.

TABLE 12

Companies that had the lowest number of adverts for confectionary and snack adverts shown before the watershed

TOP 5 LOWEST	HOLDING COMPANY		% OF ADVERTS SHOWN
1	Tropical Sun Foods		0.01%
2	Intersnack		0.6%
3	Peffermill Holdings		0.9%
4	Thomas Tunnock		1.2%
5	Storck UK		2.2%

The above product brands featured in adverts airing between 5:30am-9pm over July and August 2022

From the dataset provided these were the brands/holdings with the lowest/highest ads shown

If businesses were more like...

Danone. According to analysis by Bite Back, Danone Group make just 2% of their UK sales from HFSS products. Outlined in the Danone Responsible Marketing Principles is an acknowledgement that marketing communications can influence the purchasing behaviour of under 12 year-olds. In 2024, Danone further enhanced its commitment to responsible marketing by adhering to the government-endorsed Health Star Rating (HSR) system to determine which Danone products can be used in marketing communications to children.

What can businesses do...

1. **Get ahead of the incoming restrictions** on the advertising of HFSS products on TV and online before October 2025 by restricting any adverts that are currently run on HFSS food and drink.

2. **Rebalance advertising budgets** so that a greater % of promotions, marketing and campaigns are focused on healthier and more sustainable staple foods, such as fruit and veg, beans and wholegrains.

METRIC 2

Multibuys on processed meat

Almost **one in five** multibuy offers are on meat and dairy products, with **half** of these offers on processed meat (10.6%). Just **5%** of deals are on fruit and veg.

WHY IT MATTERS

While promotions make products cheaper, they also tend to encourage people to buy more of the promoted category than they intended (PHE, 2015). For that reason, the types of foods that are promoted as part of multibuy (buy one, get one free) offers and price promotions matters, as they are incentivizing citizens to buy more of certain types of foods.

Shifting diets away from processed meat towards healthier and more sustainable foods would have both health and environmental benefits. In the UK, GHGEs from the food system account for 19% of our domestic GHGEs (closer to 30% when emissions from imported food and feed are included) while almost half (48%) of all UK methane emissions come from livestock farming (BEIS, 2021). And there is strong evidence linking the overconsumption of red and processed meat to a greater risk of developing a number of chronic diseases, including bowel cancer (Salter, 2018). Yet despite this, a third of the meat we eat in the UK is processed, and only one in three of us are eating 5-a-day.

WHAT WE DID

We worked with Questionmark Foundation, to look at what type of foods are included as part of multibuy and price promotion deals. Data was collected 4th-6th March 2024 for offers available across six major UK retailers; Aldi, Asda, Iceland, Morrisons, Sainsbury's and Tesco.

Promotions on meat and dairy far outweigh the number of deals on fruit and vegetables.

Multibuy deals in scope were volume promotions, for example buy one, get one free (BOGOF) deals where customers benefit if more than one item (of the same) product is bought. Price promotions in scope were offers that discounted price compared to an original price, or discounted prices as part of customer loyalty schemes (e.g. Clubcard price). Further details can be found in our Kids Food Guarantee technical report.

WHAT WE FOUND

Promotions on meat and dairy far outweigh the proportion of multibuy and price promotion deals on fruit and vegetables.

Over 1 in 10 (13%) of price promotions are on meat and dairy products, with 4.6% of offers on processed meat. This compares to 7.4% of promotions going towards fruit and vegetables.

The picture is worse for multibuy deals. 18% of multibuy deals are on meat and dairy products, with 10.6% of all deals on processed meat, compared to just 5.3% of deals on fruit and veg.

Concerningly, red and processed meat products that are HFSS are currently excluded from the government's forthcoming restrictions on HFSS multibuy deals, due to be implemented in October 2025. This is a notable omission given the large proportion of multibuy deals we identified on processed meat.

Iceland holds a laggard position: 15% of their multibuy deals are on processed meat while barely 2% of their multibuy offers are on fruit and veg and staple carbohydrates.

Aldi and Sainsbury's both have policies of not running multibuy offers. Therefore no deals, or only a very small number of deals, were identified at both retailers. Of those retailers who do run multibuy offers, Morrisons are to be commended for running a relatively small proportion of multibuy deals on processed meat and a larger proportion of deals on fruit and veg and staple carbohydrates.

FIGURE 4

The proportion of multibuy offers on meat and dairy versus fruit and veg

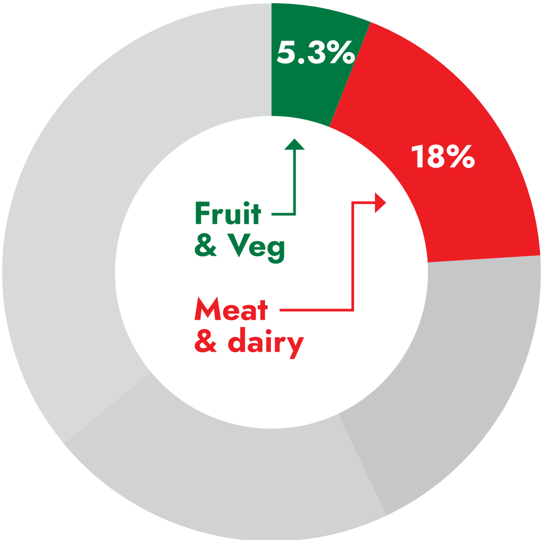


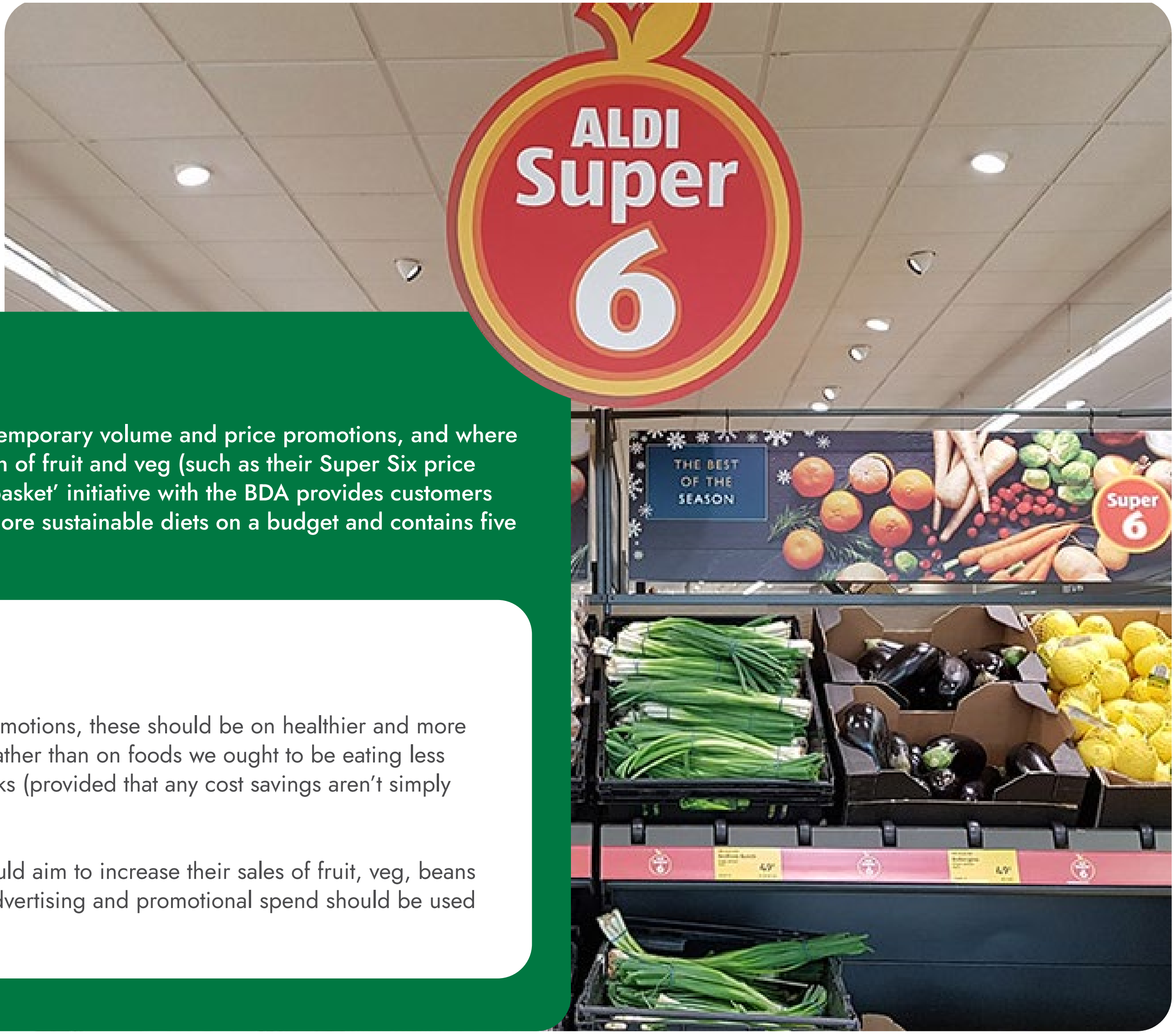
FIGURE 5

Multibuy promotions on different types of food run at individual retailers

RETAILER(S)	PROMOTIONS ON PROCESSED MEAT (%)	PROMOTIONS ON DAIRY (%)	PROMOTIONS ON F&V (%)	PROMOTIONS ON STAPLES (%)
ALDI	NA	NA	NA	NA
ASDA	10.7	4.7	4.5	2.8
Iceland	**15.0**	7.9	**2.3**	1.6
Morrisons	**6.6**	5.6	7.2	3.8
Sainsbury's	NA	3.2	**14.3**	NA
TESCO	12.6	11.3	8.7	1.6

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

Price promotions paint a similar picture (**see** Annex E). Aldi are the clear leaders in terms of focussing promotions on fruit and veg, with almost half of price promotions identified at Aldi run on fruit and veg (44.6%). Sainsbury's also perform strongly in terms of funnelling price promotions towards healthier and more sustainable food categories. In contrast, Iceland are the supermarket with the highest proportion of price promotions on processed meat (7.3%).



If businesses were more like…

Aldi have a policy of everyday low prices rather than temporary volume and price promotions, and where they do run offers, these are geared towards promotion of fruit and veg (such as their Super Six price promotion). Their 'Healthy and Sustainable shopping basket' initiative with the BDA provides customers with practical support for shopping for healthier and more sustainable diets on a budget and contains five times more plant protein than the average diet.

What can businesses do…

1 Where retailers do offer multibuy and price promotions, these should be on healthier and more sustainable food categories like fruit and veg, rather than on foods we ought to be eating less of, such as processed meat and HFSS food and drinks (provided that any cost savings aren't simply pushed back onto growers and producers).

2 Major retailers and food service operators should aim to increase their sales of fruit, veg, beans and plant protein and reduce sales of meat. Advertising and promotional spend should be used to support this transition.

Summary

Bold action is needed by both government and food businesses to shift dietary patterns, so they are healthier and more sustainable. Fixing the food system can feel like a daunting task, but relatively small shifts in behaviour can make a big difference. Supporting customers to make small changes — equivalent to eating just one apple, and half a can more of kidney beans a day, and eating a third less of a can of pringles and a single rasher of bacon less a day — would help save an estimated 6,000 lives each year from diet-related disease. It would also support the UK to meet the four dietary shifts outlined in the National Food Strategy that are key to meeting both health and climate goals (NFS, 2021).

This year's analysis has shown that while some companies are leading the way in championing responsible business practices, progress remains far too slow. **The rate at which companies are setting sales-based targets to boost sales of healthy and sustainable foods (and drive the change we so urgently need to see) has slowed almost to a standstill**. For some sectors, no notable progress at all on transparent reporting and target setting has been made this year. The casual dining and quick service restaurant sectors in particular have made no progress since last year.

Progress in disclosing data and setting targets for healthy and sustainable diets is in sharp contrast to climate reporting, where the vast majority of companies now have public targets in place for their net zero and Scope 3 emissions. It is notable that this is an area where companies are increasingly regulated and legally obligated to report on. The same approach ought to be adopted for health.

A key first step on the road to change would be mandatory reporting of health and sustainability data by large food businesses

This year's SOFI report shows that we cannot continue to leave progress on healthy and sustainable sales to the market. To date, this approach has categorically failed to shift the dial. The new government now needs to bring in regulation that raises the standard for all businesses. A key first step on the road to change would be consistent and transparent mandatory reporting of health and sustainability data by all large food businesses through the FDTP. Both businesses and government should look to ensure this basic building block of a better food system is put in place as an urgent first step.

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International House, 6 Canterbury Crescent, Brixton, London SW9 7QD
foodfoundation.org.uk | +44(0)20 3086 9953 | @Food_Foundation