The Food Foundation

State of the Nation's Food Industry 2024

Technical Report

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Standards

Metric 1. Businesses Transparency on healthy sales, sales of fruit and veg and the protein split

Data source(s)

The Food Foundation's Plating Up Progress Dashboard

Methodology

The Food Foundation's Plating Up Progress project annually assesses the progress of 36 UK-operating businesses within the food retail and food service industry across key themes relating to the transition to a healthy and sustainable food system. The 2024 Plating Up Progress analysis uses 24 metrics to assess food businesses transparency and disclosure across a range of food-related health, environment and social issues. The analysis is based only on information in the public domain, using existing benchmarks, corporate reports and company websites.

For The State of the Nation's Food industry (SOFI) report, there is a focus on whether the company discloses data and has set sales-based targets against the three core healthy and sustainable diet metrics assessed in Plating Up Progress. These are:

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

The full analysis from Plating Up progress and its methodology can be found here.

For this year's SOFI report we included 11 retailers, 5 caterers, 6 quick service restaurants, 5 casual dining restaurants, 2 wholesalers and 7 manufacturers. Companies are included in the benchmark based on their market size in the UK with a focus on publicly listed companies.

Plating Up Progress is aligned with the metrics used by World Benchmarking Alliance and draws on topic specific benchmarks that are already widely used where relevant e.g. BBFAW for assessing animal welfare commitments.

Metric 2. Business transparency on net zero and Scope 3 emissions

Data source(s)

- Science Based Targets Initiative (SBTi) – company directory
- Company annual reports and CSR reports

Methodology

As shown in Table 4 of the report, we gathered data as part of this year's Plating Up Progress benchmarking to establish whether the 36 companies assessed have a near-term and long-term net zero target, and whether these have been approved by SBTi. See this page of the SBTi website for definitions of commitments and targets. Companies were marked as 'commitment removed' by SBTi if they did not submit targets within SBTi's time frame for doing so after making initial commitments.

We also collected data on whether companies have set specific Scope 3 emissions reduction targets, and whether they are annually disclosing data on these emissions. Companies need to have established a baseline year to measure subsequent progress against, and disclosure scope 3 emissions annually, to be assessed as having adequate disclosure.

The up or down arrows indicate where companies have made progress against their baseline emissions, or not. Blank means they have not set a baseline year to measure progress against or are not disclosing any scope 3 emissions data. For Asda, as they are disclosing data annually, we have used 2021 (the first year for which they disclosed data) as their baseline, although they have no formal baseline year.

The legend indicates cases where companies have committed to set a science-based target aligned with the SBTi's criteria, or where a company's commitment is not on SBTi's website, but the company announced validation via press release. We have also indicated where companies have not set a separate Scope 3 target, but their target also includes Scopes 1 and 2.

Metric 3. Board-level accountability for health and sustainability targets

Data source(s)

Access to Nutrition Initiative's (ATNi) Global Index and findings from a Climate Governance Initiative/Kantar report and a CDP and BCG report that looks at the contribution of Scope 3 emissions within the food industry.

Methodology

The ATNi methodology used for the Global Index 2024 assesses the 30 largest global food and beverage manufacturing companies' nutrition-related commitments and policies, practices, and disclosure across seven categories. Each of the companies was assessed on a total of 150 indicators across the seven categories. Together, the topics address governance; products; accessibility; marketing; lifestyles; labelling; and engagement. Each topic is weighted according to the impact that it is considered to have on the diet of customers. ATNi sought engagement with all 30 companies and used non-disclosure agreements to ensure that their analysis and reporting is detailed, fair and representative.

We used data relevant to the 8 global food and beverage manufacturers with significant operations in the UK from ATNi's index for this metric.

Metric 4. Corporate Lobbying

Data source(s)

The UK Government website (gov.uk) 'Transparency and freedom of information releases' was searched across 10 departments, namely: the Department of Health and Social Care (DHSC); HM Treasury; the Department for Environment, Food and Rural Affairs (Defra); the Department for Business, Energy & Industrial Strategy (BEIS)[1]; the Department for Business and Trade (DBT); the Prime Minister's Office (PMO); the Department for Culture, Media and Sport (DCMS); the Department for Education (DfE); the Department for Energy Security and Net Zero (DESNZ); and the Department for Levelling Up, Housing and Communities (DLUHC). Four departments (DLUHC, DfE, DESNZ and DBT) were subsequently excluded from analysis as no (obvious) meetings on food were recorded. Our analysis therefore focussed on six government departments.

Private sector information was also accessed from the websites of the following trade associations[2]: the Agriculture and Horticulture Development Board (AHDB); the British Retail Consortium (BRC); Dairy UK; the Food and Drink Federation (FDF); Hybu Cig Cymru (Meat Promotion Wales); and the National Farmers' Union (NFU).

Methodology

The Food Foundation originally commissioned external consultants to conduct wider framing research and conduct analysis of publicly disclosed meetings held between the food and beverage industry, their trade associations, and ministers, in response to a package of high fat/salt/sugar (HFSS) policies that have been legislated for in the UK. A secondary objective also sought to shed light on the meat and dairy industry's lobbying against policies supporting a dietary shift away from meat. After conducting a first round of research we conducted further analysis of the ministerial meeting registers in-house, broadening our search out to include companies from across the food system, and – given the lack of information on the topics and/or policies discussed in meetings - looking at a wider range of meetings between 2020 and 2023.

We pre-identified 11 food and beverage manufacturers, including some of those assessed by InfluenceMap's Lobby Map, who are most relevant to the UK and most of which are part of The Food Foundation's Plating Up Progress benchmarking analysis. These were: Nestlé; Unilever; Mars; Nomad Foods; Premier Foods; General Mills; Danone; Mondelez; PepsiCo; Greencore; and Samworth Brothers. We also used The Food Foundation's Plating Up Progress benchmarking analysis to pre-identify companies from other key food sectors: food retailers (Aldi, Asda, Co-op, Iceland, Lidl, M&S, Morrisons, Ocado, Sainsbury's, Tesco, Waitrose); contract caterers (Aramark, Compass Group, Elior, ISS, Sodexo); casual diners (Mitchells & Butlers, Nando's, The Restaurant Group, JD Wetherspoon, Whitbread); quick service (Burger King, Domino's, Greggs, KFC, McDonald's, SSP); and food wholesalers (Bidfood, Brakes).

[1] 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).
[2] Trade associations are defined as an organization 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.

We also pre-identified the trade associations listed above, as well as the Institute of Grocery Distribution (IGD).

All lobbying activity across these departments were analysed by assessing 'gifts, hospitality, travel and meetings' from January 2020 onwards. CSV files of quarterly ministerial meeting records were searched for each of the organisations in the pre-identified lists. In some cases, organisations were recorded in different ways, so searches were repeated for the most common spellings or abbreviations e.g. "Marks & Spencer", "Marks and Spencer", "M&S". Each record identified was cross checked to ensure that it related to a new ministerial interaction.

The searches across departments with broad remits resulted in huge numbers of returns and meeting data. It became clear that DLUHC, DfE, DESNZ and DBT were not relevant as no (obvious) meetings on food were recorded. These four departments were subsequently excluded from analysis.

For clarity of language, we have used "meeting" as an overarching term for the number of organisations' interactions with ministers. The actual number of bilateral meetings was lower due to some cases where multiple organisations attended one meeting with a minister; for instance, three trade associations might have attended the same meeting, which we counted as three ministerial interactions but is only recorded as one meeting in government registers.

Our research noted that in addition to the above trade associations, the Country Land and Business Association held a significant number of meetings with government. Our research also identified a large number of smaller, livestock focussed trade associations actively lobbying ministers: the National Sheep Association; the Royal Association of British Dairy Farmers; the National Beef Association; the National Pig Association; the British Poultry Council; the British Egg Industry Council; the British Meat Processors Association; and the Association of Independent Meat Suppliers. We also noted a significant number of meetings with food delivery companies, so added the following organisations to our search: Just Eat; Deliveroo; and Uber Eats.

Given the thousands of entries, we chose to tally the relevant meetings across the six departments for the years 2020-2023 (by company/trade association). Finally, to compare the level of industry lobbying with lobbying by NGOs working in the food systems space, we also analysed the number of NGO meetings with Defra ministers (as the department with the highest number of interactions with the food industry according to our research) between 2020-2023. The NGOs we pre-identified were: The Food Foundation; British Heart Foundation; Obesity Health Alliance; Diabetes UK; Cancer Research UK; Trussell Trust; FareShare; Bite Back; Sustain; The Soil Association; Action on Salt; Action on Sugar; Alexandra Rose Charity; and The Food Farming and Countryside Commission.

Affordability

Metric 1. Wages in the food system

Data source(s)

The analysis of wages in the food sector, including the comparison of whole economy vs. food sector Real Living Wage and National Minimum Wage rates in the UK in 2023, was based on data kindly provided by the Resolution Foundation and their analysis of the Annual Survey of Hours and Earnings 2022–2023 from the Office for National Statistics.

The percentages in figure 2 were lifted directly from this dataset, as well as the figures in the headline stat.

Definitions - taken from the Living Wage Foundation, 2024:

- The Minimum Wage is the statutory minimum pay for under 21-year-olds. This is £8.60 across UK across the UK, as of April 2024.
- The National Living Wage is the statutory minimum pay for over 21-year-olds. Across the UK it is currently £11.44, as of April 2024.
- The Real Living Wage is a voluntary wage rate based on the cost of living for 18+ workers. In October 2023 this was set at £12 across the UK and £13.15 in London.

In this report, when referencing the National Minimum wage this is referring to both the minimum wages for under 21-year-olds and over 21-year-olds.

Methodology

The chart shows a comparison of the percentage of workers in the UK in 2023 who were paid the National Minimum Wage or below, and the percentage of workers who were paid the Real Living Wage. This is split between the whole food sector vs the whole economy, and then also broken down by food industry sub-sectors, i.e., retail, wholesale and manufacturing. It shows the whole economy as having 13.4% of workers paid below the Real Living Wage, and 6% of workers paid the National Minimum Wage or below. For the whole food sector, 36.4% of workers from across the whole economy were paid below the Real Living Wage, and 14.4% were paid the National Minimum Wage or below.

Metric 2. Supermarket support for low-income families

Data source(s)

Kids Food Guarantee, Questionmark Foundation

Methodology

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

Regular tracking of retail performance against these different guarantee areas has been reported via the Kids Food Guarantee dashboard. Using data captured in-house or provided by our partners Questionmark, an international non-profit think tank, we have been continually monitoring retailer progress against the Kids Food Guarantee areas since April 2023.

Further details on our methodology for each individual Guarantee area can be found in our Kids Food Guarantee technical report. Our Kids Food Guarantee Dashboard with data and reports can be found here.

For the SOFI report we summarised our May 2024 briefing which provided an overview of our findings, looking at retailer progress and performance against the following Guarantee areas:

- multibuys and price promotion deals
- fruit and vegetables
- staple carbohydrates
- first infant formula
- children's lunchboxes
- yogurt and cereals
- the Healthy Start scheme.

To produce the summary table providing an overview of retailer performance within and across each Guarantee area, we summarised progress across all reports published as part of the Kids Food Guarantee. For those Guarantee areas where performance was monitored for the five biggest retailers only (Aldi, ASDA, Morrisons, Sainsbury's and Tesco) rather than 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.

Metric 3. Meal Deals

Data source(s)

Soil Association's *Out to Lunch* survey, published in November 2024, which assesses the food and service offered to children in 20 of the UK's largest and most popular family restaurant chains. We also used supermarket meal deal surveys conducted by The Food Foundation and Bite Back ambassadors.

Methodology

We used data from two questions within the Soil Association's 2024 *Out to Lunch* survey, which assessed whether kids' meal deal menus included promotions for either healthier or meat/dairy-free options. We also used the survey's assessment of the percentage of total children's menus (not just meal deals) that were meat-free (main courses, starters, and breakfast options where applicable).

To gain a snapshot picture of retailer meal deals, Food Foundation and Bite Back Youth Ambassadors carried out a survey of meal deal options in their local supermarkets throughout August and September 2024. The survey was conducted using Typeform. Ambassadors recorded the number of meat and dairy-free meal deal "main" options in 17 supermarkets (45% of were local stores, 35% were standard and 20% superstores) and the availability of fresh fruit and vegetable "sides". They visited stores across London, Leeds, Portsmouth, Manchester and Glasgow. They also recorded the number of options with one or more red traffic light front of pack labels, with two or more green and no red traffic lights, and with four green traffic lights. Survey responses were subsequently analysed in-house.

Availability

Metric 1. Meaty menus

Data source(s)

MenuTracker, provided by the University of Cambridge.

MenuTracker is a longitudinal nutritional database of large chain restaurants with 250 or more employees. The data, collected in December 2023, included information from the menus of 78 restaurant chains in the UK, including casual dining and quick service establishments such as cafes, restaurants, pubs, cinema chains and takeaways. Details of the inclusion criteria for businesses can be found in this 2022 paper by Huang et. al.

Methodology

Meat vs meatless

From the dataset provided, the offerings on each company's menu were categorised into 'main meals', 'sides' and 'sharers' (across breakfast, lunch and dinner menus). A 'sharer' was defined as: items labelled as sharing dishes on menus, small plates, tapas, platters for 2 or more, and all single or multiple sushi items. All other menu items (including desserts, drinks, snacks, buffet items, starters, add-ons, upgrades, sauces and nibbles) were discounted - see below for further details of exclusions. Based on the item name and description, the items now classified as main meals, sides or sharers, were then also categorised into 'containing meat' or 'containing no meat', or as 'containing fish'. When dishes contained both meat and fish, they were counted into the meat category, rather than fish.

Dishes were then counted accordingly, the percentages of each were calculated and the tables showing the ranking of companies' percentage of meat main dishes and those with the highest percentage of meatless dishes were created. The percentage of fish dishes was not displayed in the report as this metric focused specifically on meat/meatless ratios, however they were still included in the total number of dishes.

Of the 78 total restaurants, 14 were excluded from the analysis due to the reasons provided below.

Companies	Reason for exclusion
Barburrito	Fewer than 10 main meals
Ben & Jerry's	No main meals, only ice cream
Boost Juice bars	Fewer than 10 main meals
Costa Coffee	No main meals, only drinks
Five Guys	Fewer than 10 main meals
Krispy Kreme	No main meals, only donuts

Paul	Fewer than 10 main meals
The Real Greek	No main meals
Thomas the Baker	No main meals
Vue Entertainment	No main meals
Odeon	No main meals
Cineworld	No main meals
Starbucks	Fewer than 10 main meals
Top Golf	Fewer than 10 main meals

We chose to include sides and sharers in our analysis this year because, although the research is focused on main meals, main meals can often encompass sides and sharers. So, they have been included, whereas starters and nibbles, for example, have not been included.

Some chains were included/excluded from last year's/this year's data scrape, due to issues with data capture due to company website changes. The chains that were included in 2022 and not 2023 were Asda Cafes, Ben & Jerry's, Cafe Rouge, Leon, Marston's, Revolution Vodka Bars, Wagamama & Yate's. See the technical report from our 2023 report for more details of inclusions and exclusions. The chains that were included in 2023 and not 2022 were Browns Restaurants, Nicholson's, O'Neill's and Town, Pub & Kitchen.

Further details on inclusions/exclusions and categorisations:

- Breakfast items such as 'toast and jam', 'porridge' and 'cereal' were included as main meal
- Items such as 'eggs on toast' were included as a main meal, but single items such as 'fried egg' were excluded, as these are likely to be add-ons.
- Pancakes and waffles were included as a main meal if on the breakfast menu but excluded if a dessert.
- Single bread items were excluded, for example 'bread roll', however 'garlic bread' or 'focaccia' were included as a side.
- If meat was offered as an add-on option, on an otherwise vegetarian menu item, then the dish was categorised as meat.
- All single or multiple sushi items were categorised as sharer, for example 'veggie dragon roll' or 'crunchy California roll 4pc'.
- All carvery items, continental breakfast items and 'veg deck' (vegetable buffet) items were excluded.
- 'A la carte' menu items were included if they could be a main/side/sharer, otherwise they were excluded.
- All pastries were excluded – these were considered to be snack items.
- Menu items were discounted if there was not enough available information to be able to categorise them as a main/side/sharer/other, or as meat/veg/fish.

Metric 2. Healthy Menus

Data source(s)

MenuTracker – provided by the University of Cambridge. See above in Meaty Menus metric for more detail.

Methodology

The dataset consisted of 72 out of home restaurants and the nutritional content of all the menu times. For each company, items were classified as either 'main meals', 'sides' and 'sharers' (including breakfast, lunch or dinner). A 'sharer' was defined as: items labelled as sharing dishes on menus, small plates, tapas, platters for 2 or more, and all single or multiple sushi items.

All other menu items (including desserts, drinks, snacks, buffet items, starters, add-ons, upgrades, sauces and nibbles) were discounted. The number of menu items which were over half of the recommended daily intake of calories, saturated fat, sugar and salt were counted and percentages were calculated against the number of main meals available per company.

50% of the average recommended daily intake for men and women according to the UK government's dietary guidelines were calculated as below.

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

Of the 72 companies, 25 were excluded from the analysis due to incomplete datasets. These were as follows

Companies
Ask
Barburrito
Bill's
Birds Bakery
Boost Juice Bars
Brewhouse and Kitchen
Chicken Cottage
Coco Di Mama
Cookhouse & Pub
Farmhouse Inns

Five Guys
Loch Fyne
Morrisons Café
Papa John's
PAUL
Pho
Pure.
Sainsbury's Café
Starbucks
Tesco Café
The Cornish Bakery
The Real Greek
Top Golf
Wasabi
Zizzi

Appeal

Metric 1. Advertising by brands to children

Data source(s)

University of Liverpool and Overnights TV, a Broadcaster Audience Research Board (Barb).

Methodology
This metric looks at how much exposure children have to unhealthy food adverts whilst watching TV, and which food companies are most commonly using TV advertising to market HFSS foods to children. The data was provided by our research partners at the University of Liverpool. They conducted an online survey of 800 children from the ages of 5 – 16 years, asking them to report on viewing activity on their most recent typical weekday and weekend day. Age, gender, ethnicity and household income were also captured in the survey. Advertising data was then purchased for the period covered (July – September 2022). The advertising data included information on the brand and/or products advertised, as well as the length, channel, date and time of broadcast. Viewing data was also provided for each advert.

We analysed those adverts in the dataset categorised as for confectionary and snack foods and aired between the hours of 5:30am and 9pm (pre-watershed). We looked at which companies had the most/least amount of adverts during those hours and ranked them accordingly.

Metric 2. Multibuys and price promotions on processed meat

Data source(s)

Questionmark Foundation, an international thinktank, captured online product and pricing information on the foods and non-alcoholic drinks included within volume and price promotions available across six major UK retailers.

Methodology

We worked with Questionmark Foundation, an international non-profit think tank, 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.

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 prices compared to an original price, or discounted prices as part of customer loyalty schemes (e.g. Clubcard price). We excluded those offers involving points for future redemption (e.g. 200 bonus nectar points) and bundle deals which offer a price discount when different kinds of products are bought together, e.g. "pizza with drink", "pasta with one of a selection of sauces", etc. We excluded bundle deals given our focus on specific product categories rather than combinations of products.

Foods included within offers were categorised depending on whether they were on meat, dairy and fruit and vegetables. Dairy based desserts such as ice cream, custard, sweet puddings, and other desserts were excluded from the dairy category given that they can be classed as discretionary confectionary products. We focused on dairy products that included butter, cheese, milk, and yogurt (incl. flavoured variants).

The NHS guidance on red and processed meat was used to categorise meat as either processed or unprocessed. This states that processed meat is any meat that has been preserved by smoking, curing, salting or adding preservatives. This includes:

- sausages, bacon and ham
- deli meats such as salami
- canned meat such as corned beef,
- sliced luncheon meats (including those made from chicken and turkey)
- pâtés

Vitamins, medicines, and other non-food products were excluded from our analysis along with alcohol.