



The Food
Foundation

State of the Nation's Food Industry 2025

Technical Report

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The Food Foundation

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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 37 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 2025 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. Healthy sales; using either a sales weighted average or % of sales of high fat, salt and sugar (HFSS) foods
2. % of sales that are fruit and vegetables
3. % of total protein sales by source (animal versus plant)

The full analysis from Plating Up progress and its methodology can be found [here](#). In 2025 we included 11 retailers, 5 caterers, 6 quick service restaurants, 5 casual dining restaurants, 3 wholesalers and 7 manufacturers. This year, Unilever have been removed from the Plating Up Progress benchmark as their portfolio now mainly consists of personal care products rather than food. Danone are included in this year's analysis for the first time, due to their size and market share. Bestway have also been added to the wholesalers to provide a clearer picture of the sector. 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. Corporate Lobbying

Data source(s)

The UK government website (gov.uk) '*Transparency and freedom of information releases*' was searched across eight departments for ministerial meetings with the UK food industry and their major trade associations¹:

¹ 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.

1. the Department of Health and Social Care (DHSC)
2. HM Treasury (HMT)
3. the Department for Environment, Food and Rural Affairs (Defra)
4. the Department for Business and Trade (DBT)
5. the Prime Minister's Office (PMO)
6. the Department for Culture, Media and Sport (DCMS)
7. the Department for Energy Security and Net Zero (DESNZ)
8. the Department for Science, Innovation and Technology (DSIT)

Our analysis focussed on these government departments from July 2024 up to and including June 2025 (only data up until Q2 2025 was available at the time of the analysis).

Methodology

Based on our previous research, we pre-identified the following trade associations most relevant to the UK:

- Food and Drink Federation (FDF)
- British Retail Consortium (BRC)
- The Agriculture and Horticulture Development Board (AHDB)
- National Farmers' Union (NFU)
- Dairy UK
- Hybu Cig Cymru/Meat Promotion Wales
- The Institute of Grocery Distribution (IGD)
- Country Land and Business Association (CLBA)

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
- 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
- Morrisons
- Ocado
- Sainsbury's
- Tesco

- Lidl
- M&S
- Waitrose (John Lewis is included under the searches for Waitrose as it is not always possible to identify where meetings are with Waitrose specifically and where the broader group is represented)

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

Food wholesalers

- Bidfood
- Brakes

We also searched for the following food delivery companies: Just Eat; Deliveroo; and Uber Eats.

All lobbying activity across these departments was analysed by assessing 'gifts, hospitality, travel and meetings' from July 2024 up to and including June 2025. 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.

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 previous research also identified a large number of smaller, livestock-focussed trade associations frequently meeting ministers, which were included in this year's analysis:

- 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
- The Association of Independent Meat Suppliers

We tallied the relevant meetings across the eight departments (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. The food and health focused 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
- The Food Farming and Countryside Commission

In this analysis the use of AI (Google NotebookLM) was utilised to count the number the number of meetings across the departments, however the results were also manually checked to reduce potential errors.

Metric 3. Net Zero targets

Data source(s)

- Climate Disclosure Project (CDP)
- Science Based Targets Initiative (SBTi)
- Plating Up Progress dashboard

Methodology

As part of Plating Up Progress, we gather data on whether the 37 companies assessed disclose and set targets for Scope 3, Net Zero, FLAG and if they are SBTi approved via the [dashboard](#). This year we also included, data kindly provided by CDP worldwide, to see which PUP companies are assessed by CDP. For this metric, we were interested in the climate questionnaire to see which companies have a credible transition plan (question 5.2 of the questionnaire) as well as each company's overall climate score. As CDP released their data in 2024, there is a possibility that some businesses may have published a transition plan since.

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 rates in the UK in 2024, was based on data kindly provided by the [Resolution Foundation](#) and their analysis of the [Annual Survey of Hours and Earnings](#) 2023–2024 from the Office for National Statistics.

The percentages in Figure 4 were lifted directly from this dataset, as well as the figures in the headline stat.

Definitions - taken from the [Living Wage Foundation](#), 2025:

- The Minimum Wage is the statutory minimum pay for under 21-year-olds. This is £10 across UK across the UK, as of April 2025.
- The National Living Wage is the statutory minimum pay for over 21-year-olds. Across the UK it is currently £12.21, as of April 2025.
- The Real Living Wage is a voluntary wage rate based on the cost of living for 18+ workers. In October 2024 this was set at £12.60 across the UK and £13.85 in London.

Methodology

The chart shows a comparison of the percentage of workers in the UK in 2024 who were paid below 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 16.8% of workers paid below the Real Living Wage, or the whole food sector, 43.5% of workers were paid below the Real Living Wage.

Metric 2. Cost of healthy lunchboxes

Data source(s)

Supermarket online web shops were searched for the products in scope between 9–25 July 2025.

Methodology

We conducted light touch research into the cost of a healthy and unhealthy lunch across seven major retailers including those with the biggest share of the market (Aldi, ASDA, Morrisons, Sainsbury's, Tesco, Iceland and Ocado). Multibuys were not included, single price promotions at the time of data capture were included to more accurately reflect the cost to consumers. The price given is for the proportion of the product needed for the portion sizes given, not the full cost of the item. The closest comparable product between retailers was selected.

The full list of products analysed from each retailer is available here. [Lunchbox product list.docx](#)

These food items have been taken as indicative items that can form part of a healthy or less healthy packed lunch and are not an exhaustive list.

We have chosen the healthy lunchbox items to gain a balance between a nutritious lunch, and one which children may realistically eat, as it’s important for low income families to provide food that their children will not reject so that it doesn’t go to waste. Portion sizes would need to vary depending on the child’s age, but this lunch is likely suitable for an older child, or a younger child including snacks eaten over the course of the school day.

To further understand whether switching to cheaper options due to limited resources could result in children eating a less healthy packed lunch, we analysed the cost of a packed lunch consisting of less healthy alternative products and compared it with the cost of our healthy packed lunch.

The alternative items in the unhealthy packed lunch are:

Items in healthy and unhealthy packed lunch

Healthy items	Less healthy items
Wholemeal bread (2 slices)	White bread (2 slices)
Spread (10g)	Spread (10g)
Cheese (30g)	Chocolate Spread (1 tbsp)
Carrots (80g), Cucumber (80g) and Hummus (50g)	Dunkers cheese snack
Apple and Banana	Chocolate Bar
Plain yogurt pot	Flavoured fromage frais pot
Bag of popcorn	Bag of ready salted crisps

For this analysis in 2025 we updated the list of items in both lunchboxes with any products at a lower price point that have launched since we first started tracking prices in August 2023.

Availability

Metric 1. Healthy Food on the Go

Data source(s)

Food Foundation survey

Methodology

We created a survey to assess the availability of healthy snacks at train stations and this was shared with our networks via a social media call to action. As a proxy, the survey asked participants to look in different outlets for the availability and count of fresh fruit and veg (including crudites, loose fruit or fruit pots) and chocolate, crisps and sweets. Participants were also given an open comment section to share any additional observations.

25 participants completed the survey, visiting 21 different stations (below) and reaching 41 businesses, which covered 100 individual outlets. All the stations visited were large stations as they all had over 0.25 million passenger trips per year ([ORR, 2024](#) & [Network Rail, 2022](#)).

Full list of train stations visited

Train stations	Passengers per year (2024)
Alnmouth Station, Northumberland	0.353 million
Bath spa	6.118 million
Bristol temple meads	10.227 million
Chelmsford Rail Station	6.538 million
Colchester (mainline).	3.719 million
Doncaster Train Station	3.916 million
Dorking (Main)	0.765 million
Edinburgh Waverley	21.308 million
Euston	36.185 million
Ewell West Train Station	0.921 million
Exeter St David's	2.722 million
Guildford	5.884 million
London Kings Cross x2	24.484 million
Newcastle x2	9.148 million
Paddington x3	66.859 million
Peterborough	4.721 million
Retford	0.546 million
Salisbury	1.812 million
St Pancras, London	35.960 million
Truro Train Station (Cornwall)	1.188 million
York station	9.185 million

Supermarkets in train stations and pubs and bars were excluded, as the focus was businesses from the Out of Home sector offering 'grab and go' options. Where there were results from the same stations, data was cross referenced as some participants may have missed some outlets.

Metric 2. Beans availability

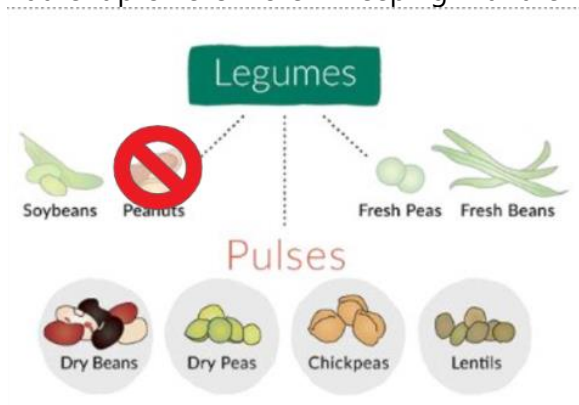
Data source(s)

Websites of food retailers and restaurants' online menus.

Methodology

We looked at the availability of beans in a) ready meals sold online by large food retailers, and b) dishes on restaurant menus. We analysed those retailers, casual dining and quick service restaurants included in Plating Up Progress.

We included all beans, pulses and other legumes, as shown in the diagram below (source: USA Pulses). This included products made from legumes e.g., tofu and tempeh, but excluded sauces or oils made from legumes, e.g., soy sauce. We included soy and pea isolates. We excluded peanuts given their nutrient profile is more in keeping with the nut category where they are typically categorised.



For retailers, we looked at fresh and frozen ready meals available in their online grocery offer. This includes predominantly own brand products, and a selection of branded products. The branded products we included were only those manufactured by companies included in Plating Up Progress assessments.

For the OOH sector businesses, we looked at mains, kid's mains and side dishes on their online menus.

Exclusions:

Aldi and Lidl were excluded because they do not have online delivery options and so their product information provided online is limited.

For the OOH sector, only mains and sides were assessed, while starters, desserts, drinks and snacks were excluded.

Branded ready meals

We wanted to capture branded ready meals stocked by retailers as well, so we looked at the ready meals which were brands owned by manufacturers analysed in Plating Up Progress, as shown below.

Brands	Manufacturers
Aunt Bessie	Nomad Foods
Bisto	Premier Foods
Marmite	Samworth Brothers
Old el paso	Samworth Brothers
Root & Soul	Tesco
Stamford	Sainsbury's
Tex mex feast	Tesco
The pizza deal	Morrisons
Wotsits	Samworth Brothers
WW	Greencore

This yielded similar results to the own brand ready meals in terms of bean categories, with the green pea/mangetout category and kidney beans being the most common types of beans and legumes found in ready meals. 60% of the branded ready meals contained beans (including mangetout/green peas), however there were only 28 products identified in total, so it was a much smaller dataset than the own brand. For this reason, we excluded these results from the main analysis in the report.

Metric 3. Healthy menus

Data source(s)

Data was kindly provided by LSHTM, as part of wider research they were conducting on calorie labelling provision and median calorie content by area deprivation.

Kalbus, A., Tanasache, O.-A., Law, C., Adams, J., Breeze, P., Brown, K.A., Cummins, S., Marks, D., O'Neill, S., Smith, R., & Cornelsen, L. (2025). How did labelling provision on menus for online food delivery change following England's calorie labelling regulations? MedRxiv. doi: <https://doi.org/10.1101/2025.09.26.25336607>

Methodology

Data were obtained from Deliveroo and Uber Eats in October 2023 and August 2023, respectively, using custom automated data collection tools (webscrapers)^(1,2). Information obtained includes a restaurant's name, tags and location as well as item name, description, price, and where available, menu section and calorie content. We removed all non-food and retail outlets from the delivery data, and deduplicated restaurants that delivered to both platforms. The companies included in the analysis were for the most part the same as the companies within Plating Up Progress.

Based on items names, descriptions and/or menu categories, we determined whether they were food or drink items, intended for sharing (e.g. 'family feast', 'bucket for two' etc.), or a meal deal or bundle (e.g. 'meal deal', 'box incl. a side/drink'), and whether it was an 'extra' such as toppings and condiments which wouldn't be consumed by themselves.

We considered all branches of relevant chains and calculated summary statistics. These are not weighted by the number of areas each food outlet delivers to, but are implicitly weighted by the number of branches per chain (as every meal in every branch is counted). Therefore, sector-level aggregates are greatly influenced by the number of branches of each chain. For example, the QSR sector is mainly driven by McDonald's due to their large number of branches (and subsequent items).

Not all chains of interest for the SOFI report were present in the delivery data, leaving a sample of 21 chains, none of which are from the 'Caterers' sector. The analysed dataset comprises 321,325 items (80.8% food items) from 3,410 branches of the 21 chains. Additional notes on the data are provided in the table below.

Chain-specific calorie content

Businesses of interest in online food delivery data (Deliveroo & Uber Eats, October 2023)									
Business of interest	Classification built on MenuTracker ^a	Available in online food delivery data	Number of branches in data	Food items		Food items (without extras, bundles and sharers) ^b		Drink items	
				Mean kcal (SD)	Median kcal (IQR)	Mean kcal (SD)	Median kcal (IQR)	Mean kcal (SD)	Median kcal (IQR)
QSR									
Domino's		No							
Greggs	Cafes and Bakeries	Yes	30	814 (1,043)	492 (307 to 624)	434 (186)	438 (331 to 601)	142 (101)	114 (69 to 233)
Burger King	Western Fast Food & Takeaway	Yes	407	807 (447)	759 (454 to 1,053)	572 (248)	571 (386 to 719)	94 (96)	95 (2 to 210)
KFC	Western Fast	Yes	990	610	450	339	330	54	12 (1

	Food & Takeaway			(642)	(300 to 615)	(170)	(165 to 450)	(88)	to 63)
McDonald's	Western Fast Food & Takeaway	Yes	1,293	513 (304)	444 (285 to 775)	352 (163)	321 (258 to 438)	120 (139)	80 (3 to 197)
SSP									
Upper Crust	Cafes and Bakeries	Yes	1	524 (180)	438 (412 to 633)	524 (180)	438 (412 to 633)	-	-
Millie's Cookies^b	Cafes and Bakeries	Yes	30	4,633 (2,390)	4,388 (2,280 to 5,972)	255 (188)	183 (48 to 315)	-	-
AMT Coffee		No							
Café Local		No							

Casual Dining

JD Whetherspoon		No							
Mitchells & Butchers		No							
Miller & Carter	Restaurants	Yes	111	809 (355)	703 (593 to 963)	803 (364)	696 (593 to 963)	134.8 (60.4)	135 (75 to 195)
Brand News		No							
ALEX		No							
All Bar One	Pubs, Bars Inns	Yes	35	650 (348)	640 (320 to 831)	623 (324)	626 (320 to 828)	75.0 (0)	75 (75 to 75)
Browns	Restaurants	Yes	24	785 (532)	667 (399 to)	661 (378)	577 (394 to)	133.6 (60.7)	75 (75 to 195)

					1,025		841)		
)				
Castle Ego		No							
Ember Inns	Pubs, Bars Inns	Yes	246	787 (389)	855 (434 to 1,086)	753 (352)	701 (401 to 1,086)	79 (42)	82 (65 to 115)
Harvester	Restaurants	Yes	157	1,072 (733)	847 (514 to 1,515)	963 (585)	785 (495 to 1,315)	67.7 (82.2)	9 (0 to 191)
High Street Innkeeper's Collection		No							
Nicholson's	Pubs, Bars Inns	Yes	1	747 (442)	677 (435 to 1,097)	747 (442)	677 (435 to 1,097)	97 (55)	75 (66 to 86)
O'Neill's	Pubs, Bars Inns	Yes	5	796 (387)	655 (486 to 1,258)	796 (442)	655 (486 to 1,158)	-	-
Orleans Smokehouse		No							
Premium Country Pubs	Pubs, Bars Inns	Yes	1	733 (389)	614 (421 to 979)	733 (389)	614 (421 to 979)	227.3 (170. 8)	195 (135 to 304)
Sizzling Pubs	Pubs, Bars Inns	Yes	217	770 (727)	697 (343 to 1,005)	667 (401)	646 (299 to 938)	86 (46)	75 (52 to 86)
Stonehouse Pizza & Carvery	Restaurants	Yes	67	1,027 (636)	1,001 (483 to 1,372)	1,015 (623)	935 (483 to 1,340)	76 (69)	72 (9 to 129)

)				
Toby Carvery	Restaurants	Yes	143	896 (829)	581 (468 to 979)	664 (326)	556 (439 to 820)	132 (54)	129 (75 to 195)
Vintage Inns	Pubs, Bars Inns	Yes	98	750 (398)	735 (351 to 1,065)	751 (398)	735 (351 to 1,065)	75 (0)	75 (75 to 75)
Nando's	Restaurants	Yes	385	411 (346)	332 (141 to 603)	406 (249)	367 (202 to 597)	105 (140)	57 (15 to 119)
The Restaurant Group									
Wagamama	Restaurants	Yes	130	534 (326)	453 (308 to 773)	579 (313)	504 (343 to 815)	114 (78)	110 (69 to 160)
TRGC – transport hubs		No							
Brunning & Price		No							
Bar Burrito	Western Fast Food & Takeaway	Yes	13	413 (297)	387 (67 to 624)	511 (254)	539 (386 to 682)	139 (255)	36 (1 to 114)
Whitbread									
Beefeater		No							
Brewers Fayre		No							
Bar + Block		No							
Thyme		No							
Table Table		No							
Cookhouse & Pub		No							

Appeal

Metric 1. Outdoor advertising

Data source(s)

Outsmart 2021-24 Out of Home Advertising Spend Analysis

(https://www.outsmart.org.uk/site/userfiles/File/20250211102829_Out_Of_Home_Advertising_Spend_Analysis_2021-24.pdf)

Methodology

For this metric we looked at data published by [Outsmart](#), the UK's trade body for the Out of Home (OOH) advertising industry which represents media owners responsible for over 90% of the sector's revenue.

The Outsmart website states that their members cover all public spaces from city centres, transport and travel hubs, to roadside, shopping & retail, leisure and fitness, healthcare and education. Formats include Posters, screens, billboards, buses, taxis, trains, ambient, banners, kiosks, ticket gates, bespoke installations and more.

This data we looked at illustrates the biggest spenders within OOH advertising, broken down by category and businesses over the period 2021 to 2024.

The Outsmart data is publicly available and can be found here:

(https://www.outsmart.org.uk/site/userfiles/File/20250211102829_Out_Of_Home_Advertising_Spend_Analysis_2021-24.pdf)

Metric 2. Gaming

Data source(s)

We used two academic studies to inform this metrics:

1. Evans. E.R, Christiansen. P, Masterson. T, Barlow. G, & Boyland. E (2024). Food and non-alcoholic beverage marketing via Fortnite streamers on Twitch. Available from: <https://tinyurl.com/4fkmvj3>
2. Caitlyn G Edwards, Catherine C Pollack, Sara J Pritschet, Keally Haushalter, John W Long, Travis D Masterson (2021). Prevalence and comparisons of alcohol, candy, energy drink, snack, soda, and restaurant brand and product marketing on Twitch, Facebook Gaming and YouTube Gaming. Available from: <https://pmc.ncbi.nlm.nih.gov/articles/PMC8593406/>

Methodology

We used data from two studies analysing food and drink marketing on Twitch, a major videogame livestreaming platform, to look at which brands and companies most frequently promote their brands

and products.

We also drew directly on analysis from Evans et al on the proportion of food marketing cues that are defined as HFSS (high in fat, salt and sugar), and the proportion categorised as branded or product specific.

While the Edwards et al paper looks only at food marketing cues in stream titles, the Evans et al paper included food and drink marketing cues across a wider range of locations on the videogame livestreaming view: see below.

Figure 1: Reproduced from Evans et al, 2024. An example of the marketing techniques used by Twitch Streamers in-stream. In the red circle is an example of product placement in the streamer section; in the orange circle is an example of a looping image cue (i.e., this image is part of an advert roll, which cycles through multiple different images) in the game section; in the yellow circle is an example of a textual advert in the title.

