

# Footprint Sustainability Index

## Trends Report 2016

Supported by  
Bidvest Foodservice and Plate2Planet

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**FOOTPRINT**  
INTELLIGENCE

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employees  
**collaboration** food security  
**water** sustainable menus  
 policy pressure logistics energy emissions  
 sustainable thinking public pledges  
 antibiotics supply chain **Waste**  
**health & wellbeing** provenance  
 animal welfare **nutrition** local communities

## Driving and sharing best practice in foodservice

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It gives us huge pleasure to present the inaugural Footprint Sustainability Index – Trends Report.

In many ways, Footprint has been the catalyst for shifting sustainability efforts in foodservice and hospitality; giving best practice a platform and context whilst highlighting areas requiring attention. Our industry has arguably, in parts, upped the ante on responsible business practice more than many other sectors but there is still a long way to go. Corporate sustainability is often a case of two steps forward and three steps back; food fraud, the redundant Public Health Responsibility Deal, soya, water, palm oil, GM all spring to mind.

Our objective with the Footprint Sustainability Index is to chart where we have come from, what we have achieved, to identify the areas of the market pulling their weight and those falling behind; but most importantly highlighting where the opportunities to make a difference are going forward. The question is: will your business be making a difference?

The Footprint Sustainability Index 2016 is an ongoing project. The index element aims to chart our progress across the board starting from now. This painstaking research has effectively created a playing field. We will now be able to chart our ongoing progress in some areas, and perhaps our regress in others. It will be the barometer for the industry to work with; a bible of best practice forecasting trends and giving business leaders insight into hot opportunities for strengthening their business and gaining competitive advantage.

We would like to take the opportunity to thank Bidvest Foodservice and Plate2Planet.co.uk for supporting this project. Without the backing of forward-sighted organisations, this project would have fallen at the first hurdle. We would also like to thank the people and organisations from across foodservice who generously shared facts, figures and insights throughout the interviewing and research process.

We hope you enjoy reading the Footprint Sustainability Index – Trends Report and we hope you will enjoy acting upon it. Please do let us know your thoughts. Tweet us @footprintmedia #sustindex



## Executive Summary

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**Who's doing what, why, and what needs to happen next: an analysis of the key trends in sustainability in foodservice.**

Foodservice has been pushing the boundaries. This ranges from an acceptance of responsibility for impacts up and down the supply chain to a growing recognition of the importance of sustainable meals and concerted, collaborative action to tackle industry waste. When it comes to sustainability, foodservice is growing up. But there is a way to go and the goalposts are moving all the time.

Covering the key topics of **supply chain, natural resources, energy and emissions, health and vitality, waste, and employees and local communities**, this report outlines where we have come from, and where we need to go next.

The **Footprint Sustainability Index** spotlights which parts of foodservice have made good progress, whilst highlighting the hottest emerging trends and opportunities, as well as which players need to do more and on which issues.

Foodservice is polarised between leaders and laggards, with some sectors and companies doing brilliant work, but many others are still coasting along with business as usual.

To keep climate change within the 2°C temperature rise demanded by the Paris Accord, complacency is not an option. Failure to act is a recipe for risk and ultimately, business failure. To use a Roman analogy, we can keep on blindly cooking as the planet burns. Or, we can build on our successes to share best practice and continually push for better, more sustainable systems and solutions to ensure foodservice takes responsibility for its share of impacts and emissions.

This index is designed to do just that. By sharing best practice and highlighting where we need to direct effort, we have a map to guide us to a more sustainable future.



## Leading insight - 2016 action points:

- **Create sustainable menus.** Understand and reduce the impacts of the food you serve, both on the planet and on human health. It is the only way foodservice should think about food.
- **Understand and take responsibility for the impacts of your supply chain.** Your customers expect you to, and businesses are being increasingly held to account.
- **Embrace collaboration.** From forums to working groups and business-to-business partnerships, collaboration is the new normal, but we still need to do more to address issues collectively.
- **Lead the sustainable norm.** Sustainability has shifted to become an accepted and commercially important part of business practice. Embed it into your operations and thinking or risk being left behind.
- **Ensure good provenance.** Transparency, quality and assurance are key. If you cannot prove to your customer that you know where your food comes from and that you are happy with its assurance and ethics, you have a problem.
- **Get ready for rapid action.** Customers are demanding answers, and combined effort can ensure fast industry transformation.
- **Water is the new elephant in the room.** Assess your impacts and your risks and work out a strategy to tackle them.
- **Be bold with pledges.** Those without targets and a strategy to achieve them are lagging behind. The leaders are setting punchy targets to drive innovation and transformational change.
- **Adopt a nutritional lens.** Demonising one ingredient/nutrient or trying to boost another can oversimplify things. Adopting a rounded nutritional lens to ingredients, recipes and supply chains is the best way to ensure food is truly healthy.
- **Never mind the policy – do it anyway.** The Responsibility Deal might have fallen by the wayside, but making out of home food healthier is foodservice's responsibility, whatever the policy/voluntary framework.
- **Educate your workforce about sustainability to maximise your impact.** It will create a green ripple effect throughout your organisation which will lead to greener behaviours and solutions, whilst disseminating through society too.



## Supply Chain

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**With increased customer desire for provenance and transparency, foodservice has made great strides in taking responsibility for its impacts up and down the supply chain, not just inside its own operations.**

As key players take it in turns to ask questions and be questioned about their impacts, issues are flowing along the chain from customers to clients to caterers, wholesalers, distributors, manufacturers and producers. Yet whilst everyone is expected to take responsibility for their part, the mood music is that companies will continue to be increasingly held to account for their suppliers.

Another key development in foodservice is that the acceptance of sustainability as a key business consideration has been wholesale. This has happened across foodservice, as it has in many industries, but the supply chain demonstrates it strikingly. This is because sustainability experts are now positioned along the foodservice supply chain as questions have been passed along it, and businesses have recognised the need to dedicate resources to finding answers, and addressing challenges.

The pace of change is also ramping up. The speed of transformation from initial question to industry action is becoming more rapid. Issues that are first raised front of house or by contract catering clients, such as animal welfare, sustainable soya, carbon intensity, or water and antibiotic use, are prompting a chain reaction of questions all the way back to distributors and producers. And the chain of questions is leading to collaborative effort.

Collaboration is the new watchword with the most innovative, effective solutions being found through partnership.

Yet there is a sense that foodservice (along with other business) is made up of leaders and laggards. Some companies are really pushing the boundaries and working to shift industry norms, but many others are still tinkering around the edges or coasting along with business as usual. To keep climate change within a 2°C temperature rise, we all need to use our influence to shift towards more sustainable systems to ensure our businesses survive and thrive.





## Leading insight - 2016 action points:

- **Understand your supply chain and address your biggest impacts, wherever they occur.** Businesses will be increasingly held to account for their supply chain.
- **Embrace collaboration.** From forums to working groups and business-to-business partnerships, partnerships are the new normal, but we still need to do more to address issues collectively.
- **Get ready for rapid action.** From soya to disposable cups, when supply chains communicate, industry is transforming more quickly and effectively.
- **Start thinking in terms of sustainable ingredients.** Then work with your supply chain - and with those who share your marketplace - to make them a reality.
- **Ensure good provenance and take on the big issues.** Concern about provenance is here to stay, and issues like animal welfare, antibiotic use in livestock farming, soya and palm oil, cannot be ignored. The most effective way we can tackle them is collectively.

provenance gmo  
soya collaboration organic  
communication rapid action fish antibiotics ethical certification  
milk impacts partnerships  
animal welfare British food security  
sustainable ingredients

## Collaboration is the new normal



Sustainability in foodservice has got people talking: from growers to suppliers, distributors, contract caterers, casual dining and high end restaurants. From sharing best practice to roundtables, forums and certification schemes, the leaders are the businesses who are there at the founding table, lending their weight, expertise and purchasing power to drive momentum, and helping to shape workable solutions.

From Bidvest launching Plate2planet.co.uk to provide an online information sharing platform that is open and relevant to everyone across foodservice; to Unilever working with Compass to translate product credentials into something that is meaningful for their clients; and Vacherin investing two years in finding a supplier of ugly fruit and vegetables; to Greene King working with Kuehne + Nagel to backhaul waste, foodservice is becoming more flexible and cooperative.

When McDonald's launched its pledge to halt deforestation across its supply chain, it explained that the move was partly driven by suppliers. Suppliers had pointed out that their anti-deforestation commitments were stronger than McDonald's and suggested the fast food giant made the same commitments. The incident demonstrates the power that both parties can exert over each other.

Unilever, known for helping to found the Marine Stewardship Council (MSC) and the Roundtable on Sustainable Palm Oil (RSPO), continues to think collaboratively. In the UK, for example, it has worked with the farmers providing Colman's mint to ensure they are not competing with each other but complementing each other. This allows them to stagger their harvest and share machines/GPS technology. This also allows them to harvest the field to exactly what is required, with little wasted.

Research<sup>1</sup> by the WWF and the Food Ethics Council concluded that joint effort and knowledge sharing was imperative. Yet it is still not happening enough. This is because the "limited knowledge amongst businesses of





how to deal with the range of issues associated with production – growing demand, climate change, deforestation, water management, fossil fuel dependence, soil fertility and biodiversity loss – further increases the risks”.

The research concluded that voluntary agreements were not enough. This is because despite an “appetite” to address issues, the motivation to work collaboratively remains “weak”.

There are mechanisms which help businesses share knowledge without losing competitive advantage, such as benchmarking schemes and informal working groups. Foodservice must embrace these or risk falling short.

#### REPORT CARD

Excellent examples demonstrated across foodservice but motivation to work collaboratively still weak.



## Sustainable ingredients must become the norm



The next part of the journey is sustainable ingredients. It is clear that many companies are still struggling to account for their impact up and down the supply chain – such as the emissions created by the food they sell, for instance.

Accounting for this is fiercely complicated at a global level. The COP21 deal has focused on product-based reporting rather than consumption-based metrics. But assessment is becoming a reality at company level. Coca-Cola has calculated that its own core business operations make up 32% of its value chain footprint<sup>2</sup>. Sodexo is developing a tool with the WWF to determine the carbon and water savings from its new “green and lean” sustainable menus.

Big brands, such as Unilever, are recognising that foodservice is increasingly turning to brands with strong environmental credentials so they can trust the quality, provenance and sustainability of their ingredients, even if a unified framework does not yet exist. This is one reason why the company has a stringent agricultural code, which has helped it to claim that over 50% of its agricultural raw materials are sustainably sourced<sup>3</sup>. Yet despite

the fact that Unilever first published this in 1996, only a few have followed. This is disappointing. Industry has to achieve genuine sustainability of its ingredients, from the choice of pesticides to water conserving irrigation practices and picking at peak to save resources. It is the only way we can hope to ensure a secure supply into the future.

## The importance of provenance



The shockwaves from the horsemeat scandal of 2013 are still being felt in foodservice. Provenance and transparency continue to be top priorities to reassure consumers concerned about what is in their food and where it has come from. The shift in awareness around sourcing and provenance has been described by foodservice insiders as “radical”, with surprising players such as McDonald’s coming to the fore to lead the market on sourcing and transparency. This is driving a trickle down effect that will overhaul the rest of the industry.

### Ethical certification still important

Ethical trade is continuing to grow in popularity. In the last year, Nestlé has committed to a no deforestation policy, and Nestlé Professional UK and Ireland announced they were only selling 100% sustainable cocoa. Apetito joined the Ethical Trading Initiative. Starbucks doubled its farmers’ fund to £19m.

Yet, in the last year, ethical certification has been under the microscope. There is concern that some claims, such as deforestation-free claims, lack accountability and must be handled carefully. Rainforest Alliance came under fire after a BBC investigation found poor working conditions on some of its certified tea plantations<sup>4</sup>. RSPO was criticised for dodgy auditing practices, although it did finally launch its improved criteria “RSPO Next”.

Meanwhile, although sales of Fairtrade wine have reached a record high, the



sales of Fairtrade goods fell for the first time since the mark was launched 20 years ago. Then, some Sodexo research indicated that only around a third of students cared about sustainable products<sup>5</sup>.

Yet, despite this, consumers use ethical products as a barometer of a food company's ethical standing. 72% said they expect food products to meet adequate ethical standards without having to pay more for them – a trend confirmed by industry insiders throughout this research<sup>6</sup>.

Ignoring the issue does damage sales. Half (52%) of consumers say they would boycott a company if they found it was acting unethically<sup>3</sup>. The reluctance to pay more is likely to be linked to the lack of clarity over what ethical claims actually mean. Half (52%) say they find information about which foods are ethical confusing, but the same percentage say they would pay more for ethical products if they understood clearly where the extra money went.



This passes the responsibility back to those in foodservice to educate our customers about our food's ethical credentials, and to demand more case studies and detail from the ethical marks to help bring the benefits of certification to life.

In the supply chain, dodgy practices definitely cost business. Mars, Unilever and Kellogg have been quick to break ties with palm oil producer IOI after it was suspended from the RSPO, and Nestlé and Cadbury owner Mondelez are expected to follow suit.

GMO is another area that will come under the spotlight in the future as transparency in the food supply chain highlights issues further up the chain, such as the reliance of genetically modified soya in animal feed, and the difficulty in guaranteeing non-GMO soya because suppliers typically do not support segregated supplies.

The industry's reluctance at times to engage with complex and thorny issues can mean that some companies do not even list problem ingredients, such as palm oil. But such an ambiguous approach is just a way of storing up strife for later.

### **Animal welfare still vital**

Animal welfare continues to be a key challenge. Consumers expect high welfare as standard, but in practice, they remain reluctant to pay for it, despite professing to be willing to shell out more in surveys<sup>7</sup>.

Animal welfare is crucial though because it is intrinsically linked with brand reputation: consumers link ethical meat with an ethical company. Research by Mintel found that 74% of consumers say that meat coming from well-treated animals is one of the top issues that makes a food company ethical<sup>8</sup>. Eurobarometer research<sup>9</sup> found that more than three quarters (76%) of UK

consumers feel the welfare standards for farmed animals could be improved. 89% also believe there should be an EU law requiring any person using animals for commercial purposes to care for them<sup>10</sup>.

This ties in with the finding of a recent Footprint Forum on animal welfare<sup>10</sup>. This concluded that if your customers would not eat your food if they knew where it came from, you need to change your supply chain, and pronto.



Whilst organisations such as Pret A Manager have always had a clear stance on animal welfare, some major players such as McDonald's and KFC are moving it mainstream. KFC has committed to serving only Red Tractor standard chicken, although some would argue that Red Tractor standards are still not high enough. McDonald's beef is also farm assured, but for other products it has gone further. It has committed to serving only free range eggs, pork from British, RSPCA assured farm schemes, organic milk in teas, coffees, happy meals and porridge, Rainforest Alliance coffee, and MSC fish.



Ethical meat can be a tough one to justify financially, because most people expect and trust chains with an ethical bent, such as Pret A Manager, to be doing the right thing. Yet lines made with higher welfare products, such as free range chicken, often suffer unless the price point is kept tight.

The discrepancy between the reality of livestock farming and the welfare standards consumers expect makes animal welfare a business risk, but also an area ripe for collaboration. The more the industry moves as one to raise standards and prices, it will be possible to create a level playing field where better welfare meat that costs a little more becomes the new norm.



### Antibiotic action

Antibiotic use in farming is becoming a major topic as the clamour grows for more regulation as antibiotic resistance continues to grow. This is because the widespread use of antibiotics in livestock farming has contributed to the rise of antibiotic resistant infections. This happens by increasing drug resistance as the bacteria are exposed more often to the antibiotics that treat them; and by the passing of drug resistant strains between animals and humans (notably farmers), or through the food chain, such as in food preparation. Lastly, antibiotics and the resistant bacteria are not metabolised by the animals and so are excreted into the environment<sup>11</sup>.

Globally, the use of antibiotics in farming is estimated to be equal to that of humans, while, in the US, "more than 70 percent of medically important antibiotics are used in animals"<sup>12</sup>. A government review called for legally-binding targets on the amount of antibiotics used and a "responsible use of antibiotics" label.

However, until this happens, the livestock industry is hamstrung by the



need to produce large volumes of cheap meat, so pressure from within foodservice is crucial. McDonald's has announced that it is phasing out irresponsible antibiotic use in its US chicken, and is also working on reducing the use of certain critically important antibiotics in Europe.

Behind the scenes, other high street chains and operators are putting together policies on antibiotics, but few are ready to go public. Those who already have clear stances on animal welfare, such as Pret, will find the topic easier to tackle, but it's not an issue that the industry can afford to ignore. And, like animal welfare, it's one that is best tackled together.

### Organic on the up

Organic food is on the up with significant growth in foodservice. Overall, organic sales rose 4.9% in 2015, whilst the organic catering sector increased by 15.2%. More than £9 million is now spent on organic food through the Food for Life Catering Mark, an increase of 28.5%<sup>13</sup>.

Many high street chains are also turning to organic, especially for products like milk. Foodservice's support has even been credited with helping to keep the organic dairy industry afloat during the milk crisis. McDonald's use over 26 million litres of organic milk per year making it the second biggest purchaser of organic milk, whilst Pret A Manger and Jamie's Italian provide organic food like porridge, eggs and bread.

Bidvest, Brakes, NCB and many smaller wholesalers across the broader catering spectrum, are also providing broader ranges of organic<sup>14</sup>.

The growth comes as a meta analysis of over 250 research papers found "clear differences" between organic and conventional milk and meat<sup>11</sup>. Catering still only accounts for just 3% of overall spend on organic food in the UK. Supermarkets continue to dominate with a 69% share. With health and wellbeing a strong trend, the figures imply that, when given a choice, a certain segment of consumers are choosing organic. Providing more organic offerings for this market in foodservice can surely only provide opportunity.



### British on trend

British produce continues to be on trend and British provenance is still heavily highlighted on menus from independent outlets to high profile chains. McDonald's is continuing to convert to British, bringing their total spend with British suppliers to £900m. Mintel's 2016 shopper survey showed that 55% of Brits want to buy British whenever they can<sup>15</sup>, even whilst British-food producing capacity continues to shrink. The government is attempting support with a Great British Food campaign which includes a Great British Food unit that brings together chefs, industry, associations and festivals to push British at home and abroad.



Buying British will become vital for those wishing to serve government. From 2017, central government will commit to buying fresh, locally sourced, seasonal food, through a new, simplified food and drink buying standard, The Plan for Public Procurement. The guidelines are expected to expand to include food purchasing in schools, hospitals and prisons as well as central government.

One in three (32%) consumers say that food products from British farmers and producers should be allowed to carry the Fairtrade Mark<sup>16</sup>. A Footprint poll found that 71% would pay more for a product if they knew the extra money would go back to the producer/farmer<sup>17</sup>, yet 57% thought that farmers should just be paid a fair price.

Others have tried to create a personal link between restaurant and farm. For example, the award winning Ingham Swan has earmarked land at a nearby farm to grow and manage the majority of its seasonal British produce. Kitchen staff will help to choose and tend to the crops to ensure fresh, traceable produce, whilst it will allow front of house staff to speak knowledgeably about where the ingredients have come from.

### **Milk still in crisis**

Foodservice has come under fire from ministers and the British Retail Consortium for not doing enough to support British dairy farmers. Many continue to quit the profession, insisting they are forced to sell at a loss. When approached by Footprint, foodservice providers were reluctant publish their figures, citing commercial sensitivity, with only Sodexo and Gather & Gather promising to share their prices if others did too.

The issue is fundamental to sustainability. By failing to treat and pay dairy farmers in a way that allows them to continue to producing milk, the security of the supply overall is jeopardised. And in foodservice, we have to ask ourselves, is that a risk we want to take?



### **Food security**

The horsemeat scandal exposed the vulnerability of supply chain networks and has led to business and consumers demanding full traceability and transparency in their supply chain. With oil price fluctuations, political instability and volatile supply of crops like olive oil, cocoa and grapes all increasing food fraud, an understanding and oversight of supply chain networks is paramount.

But the food industry is not doing enough to prevent food fraud, according to the Food Standards Agency's first ever assessment of food crime in the UK<sup>18</sup>. They concluded that the "threat is real". This is partly because information sharing is still in its early stages, hampered by concern by food firms that "reporting a crime will damage their reputation or profits".





Foodservice is particularly vulnerable, with meat species substitution still observed in local authority sampling, most often with lamb replaced by beef, turkey or pork in spicy dishes where it is harder to discern specific meat flavours.

Fish can also be a common target, with 10% of fish in foodservice mislabelled – compared to a 3% average across the industry. This is attributed in part to EU regulations which standardise the system, for example by requiring the fish's scientific name to prevent language-related misidentification, and, in some cases, where it was caught<sup>19</sup>. Foodservice fish regulation is much less rigorous – it needs to catch up.

### Sustainable fish more on the menu

When it comes to fish, foodservice has made great progress, with more big names and chains committing to sustainable fish. This include Brakes, CH&Co, Garrets, ISS, Sodexo, National Trust and others taking the Sustainable Fish Cities pledge; Caterer's Choice launching the first tins of MSC-certified tuna and the launch of the first three Responsible Fishing Scheme certified fishing vessels, whilst the School Foods Standards prompted<sup>20</sup> an 18% increase in schools serving sustainable fish.

There is still much to be done. Despite showing signs of recovery in UK waters, cod is still under threat. Greenpeace research found that suppliers of well know brands including Birdseye, Findus and Young's, as well as those delivering to fish and chip shops across the UK, are using destructive bottom trawlers in the "Arctic Galapagos" to catch cod<sup>21</sup>. Reports from WWF<sup>22</sup> and others highlighting the dramatic decline in population sizes of fish including mackerel and tuna, and John West's high profile failure to meet its own sustainable sourcing targets show that the industry must continue to throw its weight behind the transformation of the fishing industry to ensure fish stocks, and the valuable protein supply it provides, for the future.

There is hope – a study from the US National Academy of Sciences calculates that if reforms were implemented today, it would lead to a "significant increase" in the amount of seafood that could be caught, creating more jobs and increasing profits by 204%<sup>23</sup>.

So why are we waiting?



#### REPORT CARD

Massive improvement seen across industry, with pockets of good practice in every category. Dubious provenance equals business risk so laggards must adopt good practice now.





## Natural resources

**When it comes to natural resources, water is the elephant in the room. Whilst concerns about soil health and its ability to continue to sustain food and farming systems and store carbon continue to grow, it has yet to become an established issue across foodservice. The hot topic in foodservice is water...**

Managing water is now recognised as one of the key challenges of the 21st century. The World Economic Forum 2015 Global Risk Report ranked water crises as the top risk to the global economy, rising from third position in 2014<sup>24</sup>.

From the water embedded in products from chickens to cucumbers and computers, to operational, onsite usage and changes in water regulation, water is a topic that needs to be taken seriously.



### Leading insight - 2016 action points:

- **Assess your water impacts and your risks to get ahead of the game.** Water is the new elephant in the room.
- **Understand how embedded water impacts your products.** The concept of embedded water is becoming mainstream.
- **Engage with your supply chain.** Work with them on embedded water, focussing on products from water stressed areas first.
- **Reduce your operational impacts.** Operational use adds up to big impacts so ensure everything from sinks to urinals are using the best technology and water practices.
- **Be ready for deregulation.** And make your water provider help you to use less and give back more.



# water

soil **water stress**  
deregulation **replenishment**  
**drains** **embedded water**  
water intensity  
measurement  
reducing operational impacts

## Water risk real

84%

of consultants said  
water is the biggest  
food security issue

24.4%

reduction in amount  
of water used in the  
production of food  
and drink

30%

water savings to be  
gained through free  
AquaMark scheme

£500m

potential savings  
to be made through  
conserving water



Water is the new carbon. It is estimated that 30-50% of all food grown for human consumption never reaches a human stomach<sup>25</sup>, consuming 550bn cubic metres of water globally for crops that are never eaten<sup>26</sup>. Increasing concern over future water supply with more and more areas experiencing water stress means that water resources need to be used as sustainably as possible. And industry is beginning to react. Members of the Food and Drink Federation who are working towards an industry-wide water reduction target have collectively reduced the amount of water used in the production of food and drink by a quarter between 2007 and 2014. This is a reduction of 5.1 million cubic metres, enough to fill 2,040 Olympic-size swimming pools.

The figures for water intensity (the amount of water needed per unit of production) saw an even bigger reduction of 26.3%, decreasing by 0.69m<sup>3</sup> per tonne of product compared to 2007.

These reductions contribute towards the industry's Food and Drink Manufacturing Water Use Reporting (formerly the Federation House Commitment), which shows that industry has collectively made a 15% reduction in water use since 2007<sup>27</sup>.



This is part of an industry-wide target to reduce water use by 20% by 2020 compared to the 2007 baseline<sup>27</sup>.

The people closest to the food industry's biggest impacts, the growers and manufacturers, are the ones who are really taking the lead on this with clear policies in place to change irrigation or factory practices to dramatically cut use. Yet head into a restaurant or food outlet, and water use normally barely registers as an issue.



### Action to measure and drive change



The growing recognition of the importance of good water stewardship is also reflected in a growing number of bodies and benchmarks. These are designed to bring industry together whilst providing the tools and the framework to help businesses engage with their own water use and impacts.

They include: the establishment of the UK Water Partnership which recently held a “Food, farming and water” workshop; the free AquaMark benchmarking scheme which promises to help businesses reduce water use by 30% and recoup up to £500m in lost annual revenue<sup>28</sup>; and the Carbon Disclosure Project, which claims to be first ever assessment of corporate water management. McDonald's, Coca-Cola and Tesco are among the 62 food and drink companies involved. In all, 700 of the world's largest companies are expected to disclose information on their efforts to reduce water use<sup>29</sup>.

### Drinks manufacturers forging the way

The importance of managing water is an area where beverage manufacturers are leading in foodservice, with big names such as Coca-Cola, SABMiller, Whitbread and Nestlé working to improve and reduce water usage.

This is partly because manufacturers have long been scrutinised and criticised for their use of water, which can lead them into conflict with local communities. Nestlé's water bottling operations routinely come under fire, and indeed in March 2016 a new campaign was launched over bottling



production in San Bernardino National Forest as water tensions are fanned by California's historic drought<sup>30</sup>. This comes despite Nestlé working hard for its factories to "withdraw 41.2% less water per tonne of product than they did 10 years ago"<sup>31</sup>.

Coca-Cola, who hit the headlines in 2003 for "draining the water that feeds their [Indian farmers'] wells"<sup>32</sup>, is now leading in water management. The corporation claims to be on track to meet its target to replenish 100% of the water it uses by the end of 2015, four years ahead of target<sup>33</sup>.

SABMiller's detailed studies of the water basins in which it operates helped to build a strong business case for action. Its work<sup>34</sup> to understand its water impacts revealed that 90% of its water use came from growing the ingredients for its beer, not the actual water used to make the beer itself. Nonetheless, SABMiller achieved its target of reducing its operational water use per litre of beer by 25 percent by 2015 from 2008 levels. This will bring the company's water consumption to an average of 3.3 litres of water to make a litre of beer, down from 4.6 litres in 2008. It is now aiming for 3 litres by 2020<sup>21</sup>.

Diageo has committed to improving its water efficiency by 50%, returning 100% of waste water from its operations to the environment safely and replenishing the amount of water used in its final product in water stressed areas<sup>35</sup>. Such commitments are crucial as tensions will only increase as water stress becomes more acute.

Yet up the supply chain, the relatively low cost of water and its apparent abundant image meant that water conservation is not often prioritised in hospitality, a situation that needs to change, and pronto.



### **A growing understanding of embedded water**

Accounting for embedded water is becoming an industry norm, with manufacturers taking the lead in working with their producers to reduce the water used in their agricultural products.

Organisations such as Unilever and Innocent have been working with farmers and growers to reduce the amount of water required to grow product critical crops such as tomatoes and strawberries. For example, by working with growers to introduce drip irrigation for thirsty crops like tomatoes, Unilever has been able to cut water use by 50%, and increase yields by 25-35%<sup>36</sup>.

Food has a massive water footprint. Irrigation for agriculture (for food and animal feed) is responsible for 70% of water use. Meat is particularly water hungry – with a kilo of beef requiring 160,000 litres<sup>37</sup>.

A WWF study found that 40% of UK imports (by value) come from countries with high areas of water risk with another 40% of imports coming from areas of moderate risk, taking the total up to 80%<sup>38</sup>. Water is used in





the supply chains of many everyday products, and two thirds of the UK's virtual water consumption is from other nations. The most significant countries for the UK (in terms of import value) with high water risk are China, the USA and Spain.

In England, Environment Agency figures show that just 17% of rivers are in good ecological health with the pressures causing failure “closely associated with the production of food and drink”<sup>39</sup>.

Friends of the Earth research estimated the water and land footprint for seven common products to reveal that the average chocolate bar requires 1,430 litres of water, the average cup of coffee 136 litres, and the average cup of tea 28 litres<sup>40</sup>.



A WWF report<sup>41</sup> outlines the steps that businesses can take to address their water risks and sets out 10 “golden rules” they should follow. These include using the WWF's Water Risk Filter to map supply chains against exposure to water risk. Businesses can also work with catchment neighbours, NGOs, and those in their supply chain to reduce risk. They could also use their influence to advocate for improved management of rivers, lakes and aquifers, and should not be afraid to create innovative solutions, the report states.

## Reducing operational impacts



The catering fraternity has been slower to act on supply chain impacts. Instead, efforts have focussed more on operational water usage on site, rather than looking to tackle impacts up the supply chain.

Urinal timer controls, waterless urinals, hippos in cisterns, infrared tap sensors, water efficient dishwashers, and, in rarer instances, rain water/grey water harvesting, are becoming more common, and can have significant impacts.

For example, late night entertainment specialists the Deltic Group reduced their water consumption by 50% by instigating measures such as reducing toilet capacity and putting sensors on urinals so they flush on movement instead of constantly. Pizza Hut installed green urinals in 200 of its venues where a green ‘bio cap’ reduces the need for chemicals and water whilst eliminating bacteria and odours. The switch means the pizza chain should save 74.4 million litres and £100,000 per year<sup>42</sup>. Waterless urinals have also been installed in over 1,000 McDonald's restaurants, with estimated savings of more than 200 million litres of water every year<sup>43</sup>.

However, fewer have taken the bolder steps to implement strategies such as rainwater and grey water harvesting. Hotels have tended to be the most proactive part of hospitality. After partnering with Waterscan to conduct a water footprint, Whitbread has reduced water consumption by 21%<sup>44</sup>.



Much of this was done by installing grey water recycling from showers, baths and taps to flush toilets, or retro-fitting rainwater harvesting. Low flow taps and showers and sensor flushing cisterns were fitted. Automatic meter readings and leak repairs also helped reduce use. In total, these actions resulted in a total water reduction of more than 250,000 cubic metres per year – the equivalent carbon saving of 251,250kg CO<sub>2</sub>e per year.

## Deregulation of the water market

Unless metering becomes common, one difficulty for many in hospitality is that water is cheap. A lot of water must be wasted operationally before businesses feel the pinch. Deregulation of the water market in 2017 is expected to push water conservation up the agenda as water companies vie to offer better deals and more services to help clients to reduce consumption.

## Down the drain

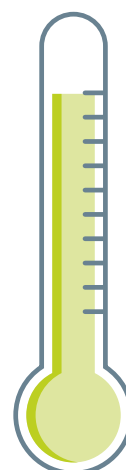
Deregulation may also drive better monitoring of what hospitality is putting down the drain. This would be welcome as drains can be an invisible issue because although most catering outlets need drains cleaning several times a year, this is accepted as a cost of business and is not usually challenged.

Severn Water and McDonald's have joined forces to reduce sewer blockages by helping to educate staff about what they should and should not be pouring down sinks and drains. The water company has been helping McDonald's to set up an awareness raising programme for a pilot group of managers across the Midlands on how to dispose of fats and oils from cooking, and understand the environmental benefits of looking after their pipes and local sewers.

It can also be financially and reputationally damaging to send the wrong things down the drain, as Molson Coors Brewery discovered earlier this year when it was fined £100,000 plus costs for breaching environmental regulations<sup>45</sup>.



Understanding water impacts – both operationally and within products and the supply chain – is crucial to ensuring the longterm security of supply. It's not a subject that foodservice can afford to ignore.



**KEEP UP THE GOOD WORK**

**HOTEL CHAINS**

**CONTRACT CATERERS,  
CASUAL DINING, QSR**

**NOT GOOD ENOUGH**



## Energy and emissions

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**Whilst business and governments may be busy trumpeting about emissions saved and carbon averted, there is a sense that we are fiddling while Rome burns.**

Nine in every 10 UK companies in the FTSE 350 now have activities in place to lower their carbon output, compared with less than half in 2010<sup>46</sup>. Three quarters offer incentives for improving climate performance; up from 52% five years ago<sup>47</sup>.

Yet UK Met Office figures indicate that in 2015, global temperatures rose more than one degree above pre-industrial levels for the first time<sup>48</sup>. It is calculated that we have already used up two thirds of the CO<sub>2</sub> emission budget to keep warming within 2°C<sup>49</sup>.

The UK-US Taskforce on Extreme Weather and the Global Food System Resilience warned that major shocks in global food production will become three times more likely by 2040. This means that dramatic falls in one of the world's four major crops of maize, soybean, wheat and rice will go from once a century to once every 30 years. Shocks could lead the UN's food price index to rocket by 50%<sup>50</sup>.

Food production and distribution, along with deforestation and land-use change for agriculture, are responsible for up to 29% of global greenhouse gas emissions<sup>51</sup>, and 30% of the UK's CO<sub>2</sub> emissions<sup>52</sup>. This is one reason why the concept of low carbon meals is growing in importance. Bringing together sustainability across the spectrum from energy and emissions to health and wellbeing, sustainable meals attempt to consider the impact of everything from agricultural practices and the impacts of raw materials to the impact food has on health and wellbeing. [See sustainable menus, page 33.]

Britain's restaurant sector consumes more than £1.3 billion in energy each year. Energy costs make up almost a quarter (22.5%) of overheads for the restaurant and catering industry, with an estimated 10% of overheads lost on wastage. Yet despite more than 80% of restaurateurs (defined as owners, chefs and managers) saying they consider sustainability when making business decisions, 75% say they do not have the tools and knowledge to make changes<sup>53</sup>.

Foodservice has made some good progress but our collective impact is too sizeable to settle for incremental improvement. As an industry, we will all have to do much, much more, much, much faster, to play our part in trying to ensure a climate tipping point past a 2°C temperature change is not reached.





### Leading insight - 2016 action points:

- **Be bold with pledges.** Those without targets and a strategy to achieve them are lagging behind. The leaders are setting punchy targets to drive innovation and transformational change.
- **Keep up to date with the best available energy efficient technology.** Leading edge is becoming the norm so do not get left behind.
- **Make logistics work harder.** From backhauling to combined deliveries, investing in efficient logistics has multiple paybacks.

**RE100 low carbon meals**  
**energy efficient**  
**technology public pledging**  
**streamlining logistics**  
**combined deliveries energy from**  
**backhauling product waste**  
**water stress**



## Public pledging



As acceptance of climate change has become mainstream and sustainability has become incorporated into everyday business, the pledges have come thick and fast from businesses committing to reducing their emissions.

Nine in every 10 UK companies in the FTSE 350 now have activities in place to lower their carbon output, compared with less than half in 2010. The percentage of businesses with absolute emissions reduction targets has also increased from 31% to 38%, according to the Carbon Disclosure Project's (CDP) latest figures<sup>54</sup>. The CDP also found that almost three quarters offer incentives for improving climate performance; up from 52% five years ago. However, only 113 of the 2,000 companies who submitted information made the "A grade" – those with the best performance on carbon mitigation and disclosure. The list includes Sainsbury's, Nestlé and Unilever.

The RE100 initiative, signed by Unilever, Starbucks, Coca Cola, IKEA group, Mars Inc, Marks and Spencer and International Flavors & Fragrances, commits signatories across business sectors to converting to 100% renewable power. RE100 analysis indicates that if the private sector switched to 100% renewable electricity, it could cut global CO<sub>2</sub> by 15%<sup>55</sup>.

Those who have made the most progress have not only looked at buying renewable energy, but also looked at circular ways of creating their own, such as Unilever powering factories on Marmite waste or by-products of the seed oil from Flora, and McDonald's running its delivery trucks on its cooking oil waste.

Mars has made headway too, reducing energy consumption across the company, whilst increasing renewable energy by 54%, in part by sourcing 12% of its energy from a wind farm in Texas, whilst in other areas capturing waste energy on site or from neighbours to power sites.



Sodexo has committed to cutting emissions by 34% by 2020 as part of its Better Tomorrow roadmap. Developed with the WWF, a partnership that Sodexo insiders credit with helping to “stretch” the company to set challenging targets, the aim is to develop an industry-leading methodology to calculate carbon emissions within the group’s entire supply chain (and that includes Sodexo’s suppliers’ supply chain). It includes tackling food waste, deploying energy efficiency interventions and incorporating renewable energy sources.

Some franchises deal with the arms length nature of the beast by negotiating green energy deals for franchisees, and moving depot locations to save transport miles (as Subway has done), but whilst laudable, if done in isolation, such efforts can lack ambition, hard targets and genuine impact.

Organisations such as Carbon Reduction Statement have created a hospitality specific platform where pubs and restaurant groups can share energy data anonymously for benchmarking. For example, the benchmarking revealed that the total energy spend represents 2% of the sector’s turnover, but 25% of its profit. This type of insight enables operators to indentify which venues and what parts of their business are consuming more than they should, across not only energy but also other issues such as water. This has helped organisations, such as the Casual Dining Group, reduce their energy use by 17% in three years.

Others, such as Canary Wharf, are using new micro-power plant technology to turn on site food and organic waste into energy that powers the site *in situ*.

Up the supply chain, food suppliers, such as Reynolds, are looking at their warehouses to incorporate energy efficiency into their operations from LED lighting, motion sensors and fitting fridges with power surgers, to changing bay doors to high insulation doors.

Other technologies that provide energy savings with relatively quick payback periods, such as variable extraction, are becoming common throughout industry. But for some catering businesses though, tackling energy use is low priority. This is because for many, analysis of their carbon impact across their business from waste to supply chain highlights how little energy use actually contributes to overall carbon impact. In one example shared by a high street chain, energy usage was dwarfed by the impacts which result from the food (including food waste) itself.

The most effective approaches to carbon management are those which look at energy use holistically across their business. Nandos, for example, has just launched a three-pillared energy management strategy. This encompasses efficient technology (such as LED lighting and variable extractor fans which only operate when food is being cooked), and green innovation (such as sending food waste for anaerobic digestion). Where it gets more interesting is staff engagement. The chicken chain is using gamification models to



encourage staff to engage in energy efficient behaviour by measuring them against themselves to track the progress of each restaurant against the same period the year before.

Staff engagement is often crucial. The Deltic Group achieved 25% energy reduction results when it engaged its staff through a range of measures that ingrained energy efficient behaviour into the company culture. Champions were walked around the venues and educated on energy issues, learning for example the amount it costs to power the air con every week, and the logic behind putting fridges on a circuit so they can be turned off from Monday to Thursday morning when the clubs are shut. They were also incentivised by receiving a percentage of the energy savings which meant that in its first year, the staff received 10% of the £400k saving.

Some companies, like Whitbread, are using valuable roof space on their building stock to install solar panels on 88 of their Premier Inns. The panels are expected to provide approximately 10% of each hotel's annual energy use, and a £280,000 saving in Whitbread's energy costs. However, the projects snuck in before the feed in tariff reductions in January, so similar projects instigated by other operators look less likely in the future.

However, pledges are not enough on their own, with some frustrating failures – such as 75% of universities failing to meet their own targets<sup>56</sup>. Pressure must be sustained to ensure that targets are met and recalibrated to continually drive improvement.



#### REPORT CARD

Excellent efforts from players in all segments of foodservice, but laggards still remain

## Energy efficient technology

Energy efficient behaviours and technologies are becoming more normal. Chefs are learning not to turn on all the equipment in the kitchen indiscriminately, and education programmes and simple traffic light systems are helping to instigate behaviour change. Lower cost energy efficient technologies are becoming mainstream, such as low energy lighting and heat recovery from extractor fans. Yet payback times for larger items of lower energy equipment make businesses reluctant to invest, although most businesses are convinced by the business case during equipment replacement cycles.

There are a few issues which make energy efficiency especially challenging – for example, contract caterers do not usually pay the energy bills in host sites. Linking contracts with energy costs is one way to address this disconnect but



more work needs to be done to link the two. For caterers, convincing clients to take the next step on sustainability is not always easy - especially if there is an extra cost. Clients are beginning to ask the right questions, but who pays for any additional investment - for example, storage equipment to reduce weekly deliveries - is a big question.



There is also a lack of industry body to drive down reductions - the Carbon Trust has stopped pushing and no-one has stepped into that vacuum. Efforts have been patchy in the pub sector, casual dining and QSR - and all need to do more.



#### REPORT CARD

Pockets of good practice, but whole industry must try harder

## Streamlining logistics



Road haulage accounts for a fifth of the EU's total CO<sub>2</sub> emissions. The transport of food is responsible for 19 million tonnes of carbon. Yet progress to date on the "greening" of logistics has been led by commercial gain rather than carbon cutting.

For many in the industry, there is frustration that alternative fuels have advanced very slowly. Technology has not kept pace with what industry requires because lower emissions vehicles, such as electric motors, cannot cope with the long distances covered by suppliers and distributors. There have been a few innovations though, such as introducing a kinetic energy recovery system popular in Formula 1 to cut lorry emissions and fuel usage by 15-25% or recycling used cooking oil into diesel, some of which are becoming more common.

McDonald's is one of the more high profile companies to run its vehicles on its waste oil. Its used cooking oil is recycled into biodiesel, which is used to help fuel its delivery fleet, saving over 7,500 tonnes of CO<sub>2</sub> each year<sup>57</sup>.



The used cooking oil, cardboard and kitchen food waste is collected by the vehicles that have delivered food and packaging to the restaurants. Using the delivery trucks in this way saves an additional 5,000 trips per year<sup>58</sup>.

When Bidvest Foodservice identified transport as its biggest impact, it launched a free used cooking oil collection service for all of its clients. This collects over 1.6m litres of waste oil annually, which is recycled into biodiesel for use within the UK to reduce carbon emissions.

Vehicle refrigeration is also a key area for reducing carbon. Alternator driven units can help reduce CO<sub>2</sub> dramatically, as they emit 50% less than their standard diesel powered alternatives. Converting to alternator driven units in 95% of their fleet has helped Bidvest Foodservice to reduce CO<sub>2</sub> by 50%, and other pollutants, such as NOx, by between 62-96%.

Other potential alternatives, such as rail and water freight, may have been unfairly sidelined. This is because a government study underestimated their environmental savings by only looking at national averages on strategic roads. The Campaign for Better Transport analyzed the routes that are typically clogged up by long-distance HGV traffic, particularly to ports. It found that if rail and water freight were increased by 50% on these routes, HGV traffic could fall by 21% and congestion could fall by 15-25%<sup>59</sup>.

For a grocer like Reynolds, logistical distribution basics include inducting drivers on eco-driving, installing tracking systems which can identify which drivers and vehicles need attention, updating the fleet to include features such as double decks, increased capacity, incorporating a percentage of biodiesel, and backhauling.



The real advances in logistics seem to have come from reverse logistics/ back haulage and consolidation in deliveries and collection. Often prompted by client requests, logistics companies such as Kuehne + Nagel are working with clients with engaged and proactive sustainability strategies, such as Greene King, to develop reverse loops so that lorries collect waste after making deliveries, reducing overall transport miles and the number of bins needed on site substantially.

Kuehne + Nagel is also focussing on consolidation – recognising that maximising the final mile by partnering with other, non-food suppliers to deliver items such as cleaning supplies and stationary maximises the capacity of the vehicle on the road, reducing delivery miles and delivery disruption. Coupled with being able to offer waste collection on delivery, this means that front of house staff can have a range of goods arrive in one delivery which includes waste removal. This reduces the administrative burden and prevents staff from being interrupted at multiple points during the day.



For the logistics companies, the beauty is that once these partnerships and fleet investments have been made and the system is operational, it can be offered to other clients.

However, the high price of fuel has driven innovation, so there is concern in the industry that the falling price could reduce the priority of fuel-efficient behaviours and innovations.

**REPORT CARD**

Front runners from McDonald's to Greene King and Kuehne + Nagel are transforming industry but leading initiatives must become standard practice.





## Health and vitality

**Health and Wellbeing has been a hot topic in foodservice over the last year, with topics like obesity and sugar rarely out of the headlines and the debate about how to make the nation healthier, and whose responsibility it is, continuing to rage on.**

Foodservice has been pushing the boundaries. This ranges from the introduction of soft drink taxes in high street restaurants and trials of healthy and sustainable school meals, to continued product reformulation and thought leadership on improving chefs' nutritional understanding.

In 2015, the big issues have been nutrition, sustainable meals, sugar, policy pressure, education and salt, whilst recurrent favourites such as fat, allergens and alcohol have barely made a splash outside of the wider nutritional context.



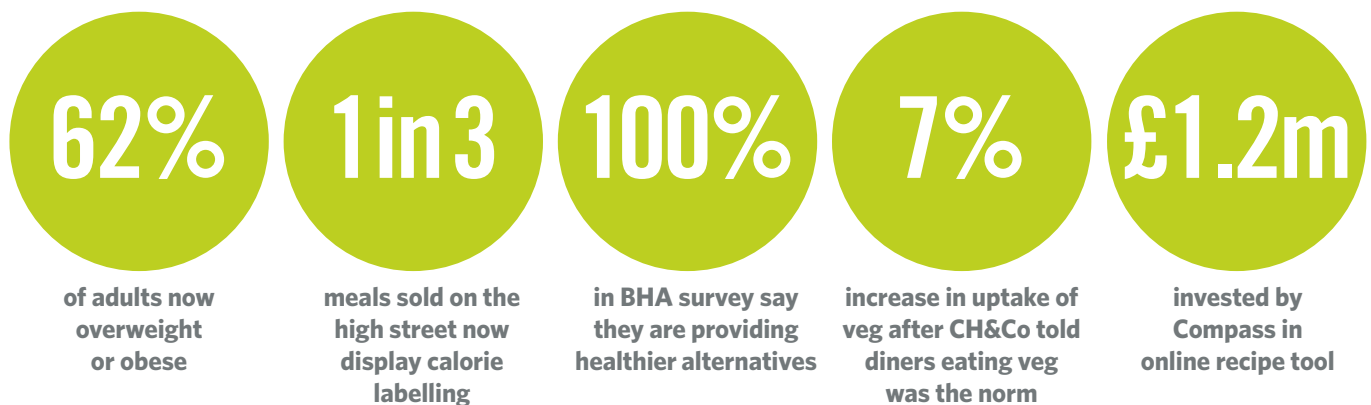
### Leading insight - 2016 action points:

- **Adopt a nutritional lens.** Demonising one ingredient/nutrient or trying to boost another can oversimplify things. Adopting a rounded nutritional lens to ingredients, recipes and supply chains is the best way to ensure food is truly healthy.
- **Create sustainable menus.** The idea is catching on and taking hold. Own it, embed it and lead – it is the only way foodservice should think about food.
- **Invest in chefs.** Chefs need better nutritional knowledge so ensure chefs in your supply chain undertake mandatory, high quality nutritional training.
- **Never mind the policy – do it anyway.** The Responsibility Deal might have fallen by the wayside, but making out-of-home food healthier is foodservice's responsibility, whatever the policy/voluntary framework.



# sugar allergens education fat nutrition salt policy pressure alcohol sustainable meals

## Nutrition



This year we have been bombarded with even more research and stats linking diet to ill health. 62% of adults in the UK are now overweight or obese<sup>60</sup>. Research has shown that obesity is fast overtaking smoking as the leading cause of cancer<sup>61</sup>, while the World Health Organisation has labelled processed meat a carcinogen<sup>62</sup>. With 1 in 6 meals eaten outside of the home, foodservice plays a key role in the nation's health.

Foodservice has made massive progress regarding health and nutrition in the last decade. Much of this has been health by stealth, from manufacturers cutting salt or sugar in everyday products such as bread, baked beans and soft drinks, to contract caterers redesigning menus to reduce fat and salt.

In 2016, health and wellbeing continues to be a significant industry trend with high consumer and client demand for healthier options with everyone from wholesalers to catering managers reporting that "customers are asking for it". This trend is also reflected in research by Nielsen, Mintel<sup>63</sup> and others. 100% of respondents in British Hospitality Association 2015 research<sup>64</sup> said they were providing healthier alternatives, but while this shows willingness,



what percentage these healthier alternatives make of the overall offering is unspecified, and likely to still be inadequate.

One in three meals sold on the high street now display calorie labelling, including 70% of fast food and take away meals<sup>65</sup>. Most major Quick Service Restaurants (QSRs) such as McDonald's, have a range of healthier options and clearer customer nutritional information, but what proportion of sales these product lines make up is generally unclear.

However, whilst casual dining has made some advances in this area, hospitality is rarely designed to be a nutritionally balanced experience. It's an area that urgently needs attention, and with consumers demanding it, it presents a massive business opportunity.



### Make sustainable nutrition the lens

The organisations leading in this area are the ones going further than tinkering around the edges to research and implement inspired ways to make the whole out-of-home food experience healthier.

Whilst issues of salt, fat and sugar are all important, industry insiders from scientists to sugar pressure groups note that providing healthy balanced meals is the most important aspect in ensuring good general nutrition, rather than demonising one component or trying to add a particular nutrient in. It's a harder concept to define and sell though, which is why single-issue campaigns can be so successful.

Taking a sustainable nutritional lens is the key as it ensures sustainably sourced ingredients are used to make healthy meals. Framing foodservice in this way highlights the need to go beyond what you can do with product innovation to shift entire menus and shift peoples' behaviour. This is where the promise lies – it just needs testing and trialling so it can be scaled up.

Contract caterers have taken on board the nutrition challenge more readily, partly because their business and industry clients understand that healthier menus lead to better staff performance. The leaders, such as Compass, CH&Co and Sodexo, have invested heavily in reformulating menus, giving more promotional attention to healthier options and meal deals, and educating customers on healthy choices.

One CH&Co project combined nutritional and lifestyle advice with lower calorie options in the restaurants in a 12-week trial. This holistic approach helped Gatwick Airport shift workers lose weight, inches and to reduce their cholesterol and blood glucose levels. A research project by the same company used social norms to increase vegetable consumption by 7% just by making diners aware through table talkers and signage that eating vegetables was the norm. Other simple, but notable, initiatives include Brighton University removing the trays in catered halls, which had the



immediate effect of reducing portion size (and waste), whilst others have reduced chip portion sizes but allowed customers to ask for more, with hardly anyone coming back for a second helping.



## Sustainable meals



The idea of sustainable meals which offer food which is healthy for both people and planet is slowly but surely building traction with industry insiders from suppliers to distributors and contract caterers predicting it will become a mainstream trend.

Food production and distribution, along with deforestation and land-use change for agriculture, are responsible for up to 29% of global greenhouse gas emissions<sup>66</sup>, and 30% of the UK's CO<sub>2</sub> emissions<sup>67</sup>.

Protein has become a main source of focus, with meat in the spotlight as it has disproportionately more impacts than plant based foods, yet global demand for meat and milk is predicted to double by 2050<sup>68</sup>. Around 70% of all agricultural land is used to grow crops for livestock<sup>69</sup>, and the average person in the UK eats 79kg of meat per year.



The UN Food and Agriculture Organisation identified livestock as being one of the top “two or three most significant contributors to the most serious environmental problems, at every scale from local to global”<sup>70</sup>. This is because of its far ranging impacts, including greenhouse gas emissions, water use and quality, impact on biodiversity and pollution. Meat also uses a huge amount of water with an average beef burger requiring about 2,350 litres of water, verses 158 litres for a soy burger<sup>71</sup>.

Sustainable meals typically feature more plants, less but higher quality meat and less processed food. The WWF has developed the blueprint for a sustainable diet with their LiveWell plate. Shifting to this diet would decrease greenhouse gas emissions by 25%<sup>72</sup> and reduce obesity by at least 15%. Even the UK Government’s newly updated Eatwell Plate has been tweaked to recommend less dairy and red and processed meat, giving it a 32% lower environmental footprint than current national diets.

The massive impacts of animal protein has spawned a variety of meat-reduction initiatives with everyone from Michelin-starred chef Alain Ducasse to Compass and IKEA trying to use less meat. The Forum for the Future Protein 2040 project aims to bring industry together to assess how 9 billion people can get the protein they need in the future whilst reducing health and environmental impacts<sup>73</sup>. However, whilst potential innovations include kitchen-top mealworm farms and insect protein to laboratory grown meat, sustainable meals are often remarkably low tech.

Sodexo has launched a WWF-partnered pilot to introduce “green and lean” sustainable meals at eight independent schools. The project reinvents crowd-pleasing classics like lasagne to be healthier and planet friendly by upping vegetable content whilst reducing fats, salts and animal proteins, at virtually the same cost and with no loss to customer satisfaction. After positive results, the company hopes to roll out the program more widely, which would have ripple effects across the whole industry.

There are other front runners. Hugh Fearnley-Whittingstall’s four restaurants were some of the first to try to serve sustainable menus with locally sourced, organic products and an emphasis on less, but higher welfare meat. Others are catching up. The Michelin-starred chef Alain Ducasse caused a stir when he announced his newly re-opened restaurant at the Athénée Hotel, Paris, would embody “naturalité” or naturalness, with vegetables and fish taking centre stage, a reduced amount of meat on the menu and largely organic produce. London’s The Grain Store ethos is to give plants equal billing to meat, IKEA has launched vegetarian meatballs, while Pret found that a staggering 96% of their customers would support a 100% veggie Pret or a veggie only fridge in every shop<sup>74</sup>. Caterer Vacherin has also launched “sustainable” menus whilst Compass has signed a deal with Hampton Creek for egg-less dressings and cake mixes.





However, whilst there have been pockets of activity, the sustainable menu must become mainstream.

#### REPORT CARD

Pockets of good practice, but whole industry must try harder

## Education

90%

of people believe chefs should take an interest in the nation's health

88%

of the industry who say they are training chefs/others on healthy eating

1.6m

children receiving free school meals after introduction of free school meals, up from 300,000

NUTRITION

nutritional training must become the norm

From the School Food Plan to Footprint's own white paper on improving the nutritional content of catering colleges' syllabuses, education is a hot topic.

Caterers have responded fantastically to the challenges set by the Department for Education in their School Food Plan to find more local, sustainable food, and healthier ingredients. The continued success of Universal School Meals ensured operators supplying in the space kept nutrition at the heart of their offering. Meanwhile, the School Food Plan confirmed in spring 2015 that food and cooking would become a part of the educational curriculum.

### Educating the engine room of the future

However, the nutritional understanding of the nations' chefs is still woefully inadequate with nutrition barely featuring in catering education, despite colleges being perfectly placed to dramatically change the culture, particularly from a default of using salt, fat and sugar to create flavour. CASH research has shown that 90% of people believe chefs should take an interest in the nation's health, and that 70% think chefs should be more responsible for helping consumers to eat less salt<sup>75</sup>.

Work by Footprint and Nestlé Professional is underway to identify





the quickest and most effective way to ensure nutritional education is incorporated in the catering syllabus, with a white paper coming later in Spring 2016.

The British Nutrition Foundation has launched a short chefs' nutrition module which makes basic nutritional training accessible for organisations that do not have the resources to do it in-house.

Some contract caterers, such as Sodexo and Compass, are attempting to tackle the knowledge gap with excellent in-house nutritional training, dieticians, recipe analysis and considered menu planning. However, the training is not mandatory.

88% of the industry say they are training chefs/others on healthy eating<sup>76</sup> whilst the Association for Nutrition have created a guide for contract caterers to define and advance caterers' own, in-house training modules.

Things are definitely beginning to move in the right direction, but there is still little being done on tracking how many chefs have actually been trained, and ensuring that those who have not received training, get it.

The industry needs to step up and commit to ensure working chefs have ongoing nutritional training so that recipes, menus and rotations are automatically designed with good nutrition in mind.







## Salt



**the average adult eats 1/3  
more salt every day than  
the RDA**



**80%  
of the salt consumed  
with food is put there  
by the food industry**

Salt reduction has been a real success story in the UK, with many food products now 20-40% lower in salt than they were 10 years ago. However, the out-of-home sector was only included in the Government Health Responsibility Deal in 2014, and is still lagging behind the rest of the food industry.

Indeed, as of March 2015, only a handful of signatories had signed up to each of the pledges, with the whole deal now apparently sidelined in favour of the government's soon-to-be-launched childhood obesity strategy. Impetus has also been lost since the FSA was relinquished of the job of monitoring the voluntary agreement.

Research on levels of salt in childrens' meals by World Action on Salt and Health found that while some UK outlets of popular fast food chains had up to six times lower levels of salt than their international counterparts<sup>77</sup> - for example, KFC's popcorn chicken in the UK versus Costa Rica. However, even the UK version, at 0.9g, was still nudging the 1g total of a child's daily allowance.

Figures also show that the average adult is eating a third more salt every day than the recommended 6g. 80% of the salt consumed with food in the UK is put there by the food industry - that is, it is in processed foods, fast foods, canteen and restaurant foods<sup>78</sup>.

Salt has registered on the foodservice agenda, with 94% of respondents in BHA research saying they were reducing salt. It just is not translating into hard enough action. Foodservice needs to dramatically up its game.

Contract caterers and manufacturers are doing the most at present, with organisations such as CH&Co reaching 2017 targets in 2015 by taking a rounded approach to salt reduction ranging from training their chefs and product reformulation to salt tolerance tasting sessions.

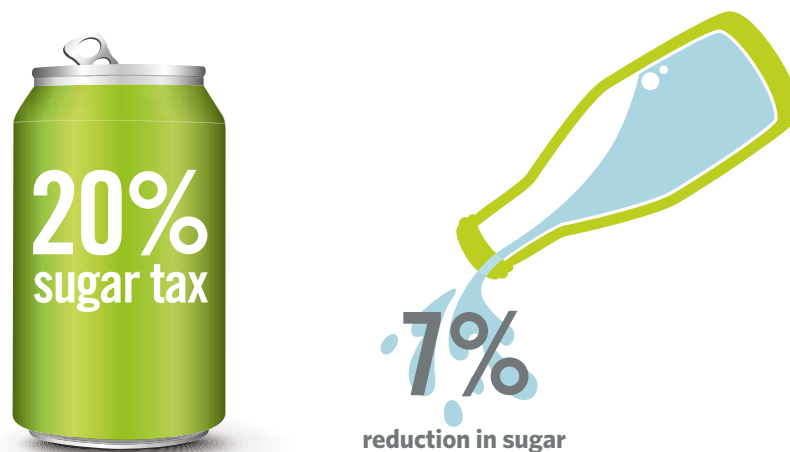




CASH research in 2015 concluded that progress on salt had been patchy with “no ‘gold standard’ companies,” with progress needed across the board. In comparison, companies “appear to be doing much better in their children’s dishes, with nearly two thirds of those surveyed already meeting the Department of Health’s maximum per serve target for children (1.8g/serving).”<sup>79</sup>



## Sugary Drinks



Barging salt and saturated fat out of the way, sugar has hogged the limelight as public health enemy number 1 in the last year with the launch of a soft drinks sugar tax causing surprise and controversy. The tax was one of the recommendations of a report by Public Health England, published in October 2015. The report also recommended curbs on marketing to reduce intake.

Jamie Oliver brought the sugar tax campaign to the mainstream public with a TV programme and lobbying efforts, whilst his restaurant chain aimed



to lead by example by adding its own levy to sugar-added soft drinks. He also supported Brighton and Hove in becoming the first city in the UK to introduce a voluntary sugar tax, whilst doctors and hospital chiefs also backed the idea.

Meanwhile, 2016 started with a study in the Lancet concluding that incrementally cutting sugar in soft drinks by 40% over five years could slash rates of obesity and diabetes<sup>80</sup>.

Drinks manufactures are working on this, with calories across the category down by 7.3% over the last 3 years, according to the latest figures from Kantar Worldpanel<sup>81</sup>. Manufacturers, like Coca-Cola and Britvic, have been reducing sugar significantly across some ranges (although sales of Coca-Cola Life, a lower sugar cola sweetened from natural sources, are apparently floundering which is a great pity).

And, after hitting the spotlight in 2014 when media reports published the amount of sugar in natural juice drinks, even juice/smoothie manufacturer Innocent are trying to reduce the natural sugar content by introducing vegetables in its smoothies and launching new ranges which mix fruit juice and water to make a lower calorie drink.

Whilst the soft drink sugar tax will tackle the drinks industry, more industry-wide action is needed across other product groups to level the playing field and get everyone reducing sugar levels harder and faster.





## Policy pressure

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The last year has been characterised by calls for a whole raft of different food related taxes and mechanisms as concerns about obesity grow, whilst the global agreement signed at COP21 in Dec 2015 could increase pressure on government interventions in 2016, although it has not had much of an impact on the ground as yet.

Meanwhile, the Public Health Responsibility Deal published some successes in the spring, but then went quiet after the election, apparently sidelined and overtaken by the government's soon-to-be-launched childhood obesity strategy.

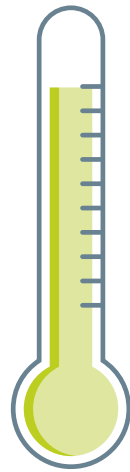
Sugar took the lion's share of the focus (see above) culminating in the controversial announcement of a sugar tax. There have also been calls for wider bans on advertising junk food to children, including pre-watershed, and faster re-formulation. Meanwhile, the Local Government Association (LGA) is urging pubs, restaurants and cinemas to display calorie information as part of a voluntary initiative.

Processed fruit snacks also came into the firing line as new research revealed that 85% of them contain more sugar per 100g than sweets, such as Haribo Star Mix, even though many parents think the snacks are a healthy choice<sup>82</sup>.

Mandatory free fruit and veg snacks in schools were mooted after an American study demonstrated that £48 spent on fruit and vegetables reduces the obesity rate by 3%. This was much cheaper than the £217 per-student per-year cost "break even point" to reduce childhood obesity by just 1%<sup>83</sup>.



Whether the sugar tax works, or the, somewhat toothless, Responsibility Deal is now defunct is irrelevant as these instruments just represent what a responsible industry should be doing anyway to overhaul its ingredients, products and menus to ensure healthier options are available more widely and more routinely to consumers. So, whether it is in the context of industry-led action, a voluntary agreement or legislation is irrelevant, foodservice should be taking action because it is the right thing to do, whatever the policy landscape.



**KEEP UP THE GOOD WORK**

**CAMPAIGNERS**

**GOVERNMENT**

**NOT GOOD ENOUGH**



## Waste

**Waste has remained a key issue in foodservice with continued momentum in achieving voluntary targets and high profile media campaigns such as Hugh's War on Waste helping to drive the issue.**

In the last couple of years, foodservice has become much more aware of food waste, and industry has shifted to start taking responsibility for it, rather than passing it back to the customer or up the supply chain. Measuring and monitoring is becoming more common. But while it is becoming prevalent, it's still not common practice, and nor is it entirely integrated into day-to-day management systems. There is still a tendency to focus on what to do with the waste itself rather than prevention in the first place.

There have been many examples of the industry adopting and introducing some brilliant innovations, some of which are becoming common practice. These range from closed loop systems which turned used cooking oil into fuel to power delivery trucks, and food waste tracking systems that shock and inspire catering staff into changing wasteful behaviour, to delivery trucks backhauling rubbish and recyclables, and ensuring edible food waste goes to food redistribution charities.

Many big operators, distributors, suppliers and outlets have changed their operations, and used their power to change the system. A few examples include Greene King working with Kuehne + Nagel to create the infrastructure for waste backhauling; Unilever raising the bar with its sustainable agricultural code and sharing good practice with their clients (including launching a free food waste monitoring app for caterers); McDonald's setting up a partnership to recycle paper cups; and KFC and Nandos joining old hands Pret A Manger in getting surplus food redistributed to charity.

### Working together on waste

Waste is an area where industry is coming together to try and tackle issues collectively, with widespread acknowledgement that few organisations are big enough to shift the market on their own.

Examples include waste summits which bring all parts of industry together from the material manufacturers to the restaurant chains, waste management companies and recyclers to hammer out workable solutions for problem components; or the plastics industry supply chains developing an action plan to meet the government's 57% 2017 recycling target. There



are also great examples of knowledge sharing. For example, Pret A Manger is willing to share the LCA it has commissioned on packaging with those in its industry who are collaborating to find solutions.

But while there are of course exceptions, in general, it is the smaller hospitality groups, hotels, pubs groups and independents who have failed to make as much progress; the latter often hampered by the lack of capacity to tackle issues beyond the day to day running of the business.



### Leading insight - 2016 action points:

- **Prioritise preventing food waste.** Start at the top when tackling food waste by ensuring you do everything possible to prevent it in the first place.
- **Send unavoidable waste to the right place.** Ensure any unavoidable waste goes to the right place from charitable distribution to anaerobic digestion. If you don't, it can become a headline grabbing topic.
- **Be smart about packaging.** Make sure you are using the right packaging, and disposing of it appropriately. Do the research to choose the best materials and systems for actual practice, instead of going with your (or your customer's) gut instinct.

**food waste**  
**packaging**  
**food redistribution**  
**litter** **disposable cups**  
**anaerobic digestion**  
**Courtauld 2025**





## Food waste



It is estimated that 50% of all food produced on the planet never reaches its intended human stomach<sup>84</sup>. Rabobank estimates waste in the European Food and Agriculture supply chains costs €60 billion a year whilst the Consumer Goods Forum calculates that the third of food calories that are produced but not eaten every year cost \$750 billion to the global economy<sup>85</sup>. In foodservice, the penny has finally dropped: food waste equals wasted profit.

Chefs used to be blind to food waste, but the situation is finally changing. WRAP and HaFSA have driven the issue into the spotlight, and industry has reacted to develop a range of tried and tested ways to tackle food waste. This ranges from guides and education programmes to tools such as waste metering systems such as Winnow and LeanPath and the free Unilever Wise Up to Waste app which helps restaurants identify and tackle their food waste.

The Hospitality and Food Service Agreement (HaFSA) has been hugely successful in driving signatories to save £3.6million in two years as a result of reducing food waste.

The new Courtauld 2025, launched in March 2016, brings foodservice, manufacturers and retailers under the same umbrella to cut the waste and greenhouse gas emissions associated with food and drink by 20% and improve water stewardship, with cumulative savings of around £20 billion. Apetito, Bidvest Foodservice, Compass, Greene King Retail, KFC, OCS, Pizza Hut, Sodexo UK & Ireland, Unilever, The British Hospitality Association and the British Beer and Pub Association are some of the first in foodservice to sign up.

The Consumer Goods Forum announced its commitment to tackling the global food waste challenge by agreeing to halve food waste within the operations of its 400 retailer and manufacturer members by 2025<sup>86</sup>.



Scotland has pledged to cut food waste by a third by 2025, a move which they estimate could save businesses and households somewhere between £500m and £800m.

### Charitable redistribution



Food redistribution has become a hot topic, with the French government passing a law committing French supermarkets to giving unsold food to charity and similar petitions launched in the UK. Supermarkets, such as Tesco and M&S are stepping up to launch their own redistribution schemes. Foodservice, whilst receiving less public pressure, has been making great strides to get more unsold food to those in need. Along the supply chain there has been increased action from suppliers such as Reynolds to contract caterers and high street chains joining old hands such as Pret A Manger and Sodexo.

There has, at times, been a disconnect between what organisations say they are doing and the reality on the ground. KFC had its fingers burnt after Fearnley-Whittingstall's TV programme, "Hugh's War on Waste", highlighted how KFC's website implied all food waste was being redistributed to charity, when in fact the company was piloting a scheme that covered under 1% of outlets. KFC has now clarified their position, outlining how the scheme will roll out to all UK and Ireland outlets by the end of 2017<sup>87</sup>. But the incident demonstrates the importance of honesty. It was a shame that a worthwhile initiative came under fire because of a lack of initial transparency.

### Holistic approaches to waste



One major area for improvement is joined up thinking as there is still a tendency to think about issues like ingredients or packaging in isolation. Disappointingly, The European Commission has dropped a 30% food waste reduction target within its EU circular economy package.

The most successful approaches are those that take a circular approach by closing the loop on product lifecycles to ensure the system is designed to create as little waste and impact at every stage.



Looking at new, less impactful ways to achieve the same output are key to sustainable thinking and there have been excellent innovations. Looking at ways to reduce the impact of ready-to-use sauces led Unilever to switch to concentrated sauces. This had the multiple benefits of reducing the packaging by 37% compared to the traditional Knorr RTU's packaging, as well as reducing water and weight, with all the knock-on emission reductions from logistics. It also created a more flexible product that customers loved as the sauce could now also be used as a spice, a marinade, a sauce and a soup.

Some upmarket restaurants, such as The Checkers in Montgomery, Powys; The Araki, London and The Man Behind the Curtain, Leeds are ditching à la carte



menus in favour of set menus to cut food waste. This is because à la carte menus create a lot of waste as kitchens have to stock for, and prepare, several portions of many dishes in advance. These can end up being wasted if the dish is less popular than expected.

Waste, of course, has value. Other innovations include turning used coffee grounds into office furniture, while concerns over single use coffee capsules led to Lavazza committing to a 2016 launch of 100% compostable coffee capsules made from thistles. Diageo has turned whisky waste into heat energy which helps power the distillation process, and recent field trials found that putting composted tea on crops increased yields by 50%<sup>5364</sup>.

Across foodservice, anaerobic digestion (AD) has seen dramatic growth, with a 500% increase to 1.6million tonnes from 2010 levels. AD has definite value for food that is not fit for consumption, but there is concern in industry that it is an end of pipe solution when reducing waste in the first place would be more effective and less impactful.

### Portion sizing

It's a tough challenge to present a customer with the perfect portion size that gives the impression of good value without leading to leftovers or overeating. But there have been a few tricks where the foodservice fraternity has managed to reduce waste without pain.

These include offering additional, lighter portion sizes; using photos of lunches for different-sized groups of guests to help events co-ordinators and bookers visualise food quantities and order correct amounts; taking away trays in catered halls to reduce the amount customers take which gets thrown away, and reducing the portion sizes for products such as chips whilst including the option to go up for free 'seconds', a service which in practice is rarely utilised.

Yet there is much more that can be done, and there is a wealth of research out there which could educate foodservice in simple ways to help people eat less and tackle food waste such as reducing plate, glass and single portion sizes. The manufacturers have made great strides reducing portion sizes and making re-sealable packing. It's likely the opportunities presented by upselling and ensuring value propositions have created conflict in front of house. But for those who take on the challenge of tackling portion sizing creatively to ensure less waste and better health whilst keeping customers satisfied will reap significant financial and environmental benefits.

### Education and excitement

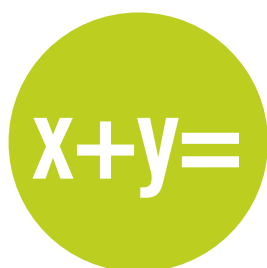
One question that remains is how to create excitement around food waste to really get people engaged and drive the issue forward; especially in hospitality





- from doggy bags to chefs and front of house. There is also considerable education to be done to ensure that customers realise that reductions in portion sizes are not necessarily only cost but waste driven and they're not being conned (as the press continually screams over manufacturers reductions in portion sizes of confectionery etc., despite increases in commodity prices).

## Packaging advances continue



**decisions must be  
based on fact not  
instinct**



**paper cups used  
every year**



**increase in food litter  
in the last year**

Packaging is an area where emotions run high. Customers hate it but the reality is that the footprint of packaging is often dwarfed by the product it protects. And fundamental beliefs about which packaging has the best environmental impact are not always held true (e.g. biodegradable packaging needs to be used appropriately in order to genuinely offer a lower impact as sending biodegradable items to landfill can increase their impact).

Consumer understanding around what can theoretically be recycled versus the actual market for that item also needs improving. This is why lifecycle analysis and other evidence-base research is such a vital tool in sorting fact from gut reaction. It's also a crucial reason why industry needs to get together to ensure commonality of messaging so that consumers do their part to ensure waste is disposed of appropriately.

From reusable crates in distribution and more businesses committed to sustainable packaging materials such as FSC certification, to redesigning takeaway containers to reduce packaging volume and weight and reducing the number of materials used to foster simplicity and easier recycling, packaging is continuing to evolve.

### Disposable cups

Disposable cups hit the headlines when they became the latest target of Hugh Fearnley-Whittingstall's "Hugh's War on Waste". An estimated



2.5 billion paper cups are used in the UK every year. Paper cups are notoriously hard to recycle as the polyethylene-coating means they cannot be recycled amongst ordinary household waste.

While industry has been trying to tackle the issue behind the scenes for some time, the media firestorm claimed several casualties, highlighting the importance of pro-activity, leadership and the importance of finding solutions to sustainability challenges before campaigners feel compelled by apparent industry inaction to take up the mantle.

McDonald's Corporation's proactive approach to disposable cups gave it a considerable advantage, having already launched a partnership to trial recycling disposable cups with James Cropper and UK's first specialist facility to recycle paper cups, Simply Cups. Cups account for about 30% of McDonald's packaging waste. The trial is being rolled out across 150 of their 1,250 UK restaurants, but the hope is that the partnership will help to set up an infrastructure for cup recycling which can be used by others in the industry.

Interestingly, whilst the outraged public call for action, insiders noted that sales of coffee were barely affected. This disconnect demonstrates how consumers often hold business entirely responsible for negating the environmental impacts of their favourite products. Yet any solution will still require consumers to play their part by disposing of cups in the right bin and without contaminants, so customer education will also be key.

The success of the plastic bag tax has led to calls for a coffee cup tax, though one seems unlikely so far. Although after the sugar tax U-turn, anything is possible.

### Litter and eating plastic



Litter has also been in the spotlight with litter levels at their worst in a decade, and a 20% increase in fast food litter was recorded in 2015<sup>88</sup>. This has led to businesses and campaign groups such as McDonald's, Wrigley's, the Packaging Federation, the Beer and Pub Association and the British Soft Drink Association to sign a Litter Manifesto calling for a national strategy.

However, the litter debate has evolved with several alarming studies showing how plastic waste is ending up in the food chain, especially the marine food chain. For example, microplastic debris was found in a quarter of fish sold for human consumption<sup>89</sup>; and 11,000 plastic particles are eaten by the "average" seafood consumer<sup>90</sup>. Increased concern over the volume and impacts of marine litter have also put packing in the spotlight. With one microplastics campaign targeting the beauty industry, foodservice – from those whose packing ends up in the marine environment to those serving fish – would be wise to start considering its stance and strategy on the issue.



## Employees and local communities

**CSR has come a long way from the local restaurant putting a Christmas tree on the village green. As one of the UK's biggest employers, foodservice has an amazing opportunity. By using its influence to educate its workforce about sustainability, we can ensure our businesses are run sustainably whilst creating a ripple of sustainable knowledge and behaviours that can be practiced and shared in the community.**

From empowering female farmers, to apprenticeships and veteran recruitment schemes, foodservice has a history of looking at ways to increase the talent pipeline. Sustainability is just another staff recruitment and retention opportunity.

Manufacturers have long recognised the importance of working to build up the communities from which they source and this recognition is now filtering up the foodservice supply chain, with operators keen to understand what is happening at a producer/manufacturer level. This matured version of sustainable business acknowledges that such behaviours are good business, because if businesses do not invest in their employees, communities and supply chains, their businesses will struggle to function.



### Leading insight - 2016 action points:

- **Use your reach.** Educate workers on sustainability issues so they can apply sustainable behaviours at work and at home.
- **Embrace the living wage.** Poor publicity has followed for those who have tried to pay for the living wage by cutting other staff benefits.
- **Think creatively to tackle the skills shortage.** From flexible hours to tempt by those with young families to embracing diversity, a wider pool means more available talent.



# living wage skills shortage creative recruitment reach sustainability inspires tips

## Driving employment and sustainability knowledge

3.6%

increase the living wage will add to foodservice wage bill

62%

of BHA members have at least 25% of women on their boards

tips

admin fees in spotlight after media pressure

258%

rise in number of restaurant and food outlets since 1998



Hospitality is now Britain's fourth largest industry, supporting 14% of total employment and delivering £143 billion to the country's economy (10% of GDP)<sup>91</sup>. The sector has created one in five of all new jobs since 2010. Yet this huge employment power provides foodservice with a huge opportunity.

If foodservice can educate its employee base about climate change and sustainability, foodservice can be a force for good in the world. It would be giving workers not just the tools to operate our businesses efficiently, but we could be giving them the knowledge to go home and tell friends and family about sustainability to broaden the issue within society. This would be hugely powerful, especially in areas like casual dining. This is because the sector is typically staffed by a young, transient, international and frequently poorly-educated workforce whose engagement in sustainability issues can often be limited.





## Living wage

Long overdue, the living wage has caused ripples across foodservice. As an industry traditionally associated with low pay, high turnover and unsociable hours, foodservice has a responsibility to improve conditions for workers in the sector. Low pay is most prevalent among women, part-time employees, those on temporary contracts and those working in hotels and restaurants<sup>92</sup>.

Research by Resolution Foundation<sup>93</sup> suggested that the living wage will see wages increase more in hospitality and foodservice than in any other industry. It estimates that the National Living Wage will add 3.6% to the wage bill of the foodservice sector by 2020. The new living wage is predicted to benefit 3.7 million women and 2.3 million men by 2020<sup>94</sup>.

Although the industry was quick to express concern about the impacts of the National Living wage, others, such as Sodexo, have embraced it. This has sometimes been done somewhat clumsily. Café Nero, for example, laudably decided to extend the National Living Wage to all staff, including those under 25, increasing the cost of implementation four fold. But this was coupled with replacing free staff lunches with a 65% discount. So, this was the component that made the headlines. Eat is also reported to have stopped paying staff for their lunch breaks to pay for the cost of the pay increase. Employers are not legally obliged to pay for legally necessary breaks, but it is a real shame when efforts to increase basic wages result in good practices being reversed.

However, with 13 hospitality and foodservice businesses in the 113 named and shamed for failing to pay at least one worker the national living wage<sup>95</sup>, companies have a clear incentive to ensure they are compliant.



## Supporting their workforce

A Bloomberg survey<sup>96</sup> on job satisfaction for UK workers found that Coca-Cola, Warburtons and Nestlé are ranked the UK's top three "best employers" in the "Food, Soft Beverages, Alcohol and Tobacco" category. However, British firms came out trumps across all categories, taking over half of the top ten spots. Baxters, British Sugar, Betty & Taylors Group and Edrington joined Warburtons in the top 10 listing. Another top ten company, Unilever, tips the balance to a British majority as a British-Dutch company.

Another achievement is around employing women, with increased regulation around gender imbalance. Foodservice has gone a long way to achieving the government target of having 25% of female board members by 2015. 62% of BHA members stated that at least 25% of their board members were women<sup>97</sup>. A further 44% said their companies were led by a woman<sup>98</sup>. Unilever have managed to achieve the ideal of creating a board with 50% women by 2015, whilst Diageo have achieved an impressive 40%<sup>99</sup>.



Others have taken a more imaginative approach to tackling the skills shortage for example, by making their operations more female friendly. Corbin and King launched an initiative aimed at tempting mums back into the kitchen after a career break by hosting workshops to discover the challenges for returning to work in hospitality with a family. The company behind the Wolseley and the Beaumont already offers 30 hour contracts, which enable job sharing, and “overnight working” initiatives where those sharing child-care responsibilities can alternate their working hours with their partner. Restaurateurs Sat and Amanda Bains have moved their restaurant and rooms to a four-day working week to improve working conditions and to attract and retain talent, irrespective of gender. Logistics experts Kuehne + Nagel have a veteran friendly approach to recruitment; providing opportunities that capitalise on the skills offered by those who have left the armed forces.

Yet there is still more work to be done to make sure such initiatives and approaches are the norm rather than the exception.

### Tips

One area long overdue for an overhaul was tips, with many companies taking a sizeable slug of the 10-12% service charge which is often routinely added to the bill. Subjected to pressure from separate campaigns led by Unite, the Observer and 38 Degrees, operators such as Pizza Express and The Casual Dining Group (which counts Las Iguanas, Bella Italia, Cafe Rouge and La Tasca amongst its brands), dropped the unfair practice of pocketing a percentage of staff tips as an “administration fee”.

The Restaurant Group – which counts Frankie & Benny’s and Garfunkel’s amongst its high street brands – was commended for its approach, which sees all card-based tips end up in the hands of staff.

The furore has led to an investigation into dubious tipping practices by the Department for Business, Innovation and Skills, and calls by the BHA for the lacklustre voluntary code on tipping to be replaced with something legally binding.



### Creating community

In the world of online retail and services, restaurants have been credited with keeping the high street vibrant. Recent figures from the Grocer found that the restaurant market totals 119,687 outlets. The largest component is pubs at 41.6%, followed by fast food outlets (30%) and casual restaurants (27%)<sup>100</sup>.

The sector has seen a 258% rise in the number of restaurant and food outlets since 1998, equating to an average 8% average growth rate. This compares to a 90% rise for other leisure outlets, and a 50% rise for shops, versus a 36% fall in the outlets in the service sector, such as estate agents



and banks<sup>101</sup>. Yet much of this growth has been of branded chains leading to bland, standardised high street experiences. Some chains are reacting by increasing their brand portfolio, or by giving outlets freer reign to adapt to local conditions, but restaurants could do more to stop homogenising the high street.

The community spirit that hospitality fosters by keeping the high street buoyant spreads further than just the high street. Charity events such as theme days or sponsored activities, staff competitions and awards have become established ways to create a sense of community within the workforce. High street chains often recognise that much of their international, student-focussed workforce live in house shares; many living with other staff members. This has led some to host regular social events which can help foster a sense of fun and family, helping to keep staff happy and reducing turnover.

Others, such as the Deltic Group take their duty of care towards their customers seriously. The late night entertainment specialists have set up dedicated phone charging points, and try to ensure lone females make use of the trusted and policed taxi ranks outside.

However, few in foodservice have managed to ensure that their approach to community adequately covers the full range of their impacts from staff to suppliers and customers. Those who succeed will reap the reward for their brand, and for their bottomline.



#### REPORT CARD

The industry must do more to share examples of good practice across the employees and communities spectrum.

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