

FOOTPRINT SUSTAINABILITY TRENDS REPORT 2019

Foodservice's guide to a more sustainable future





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Foodservice's guide to a more sustainable future

Welcome to the 2019 Footprint Sustainability Trends Report. Its purpose is to help guide internal strategy, enabling readers to identify key trends and opportunities, chart best practice and identify areas in need of urgent attention.

By sharing best practice and highlighting where to direct effort, the Footprint Sustainability Index 2019 provides an up-to-date map to guide foodservice towards a more sustainable future.

This year, we have built upon our six key topics. **Supply chain** has been widened to become **Policy and supply chain**. This is to reflect the increasing legislative pressure which ripples along the supply chain, and often requires a collaborative response.

A brand-new section, **Clients and consumers**, has emerged. This is to capture the changing dynamic of an age defined by transparency, social media and instant feedback. An age where clients and consumers are becoming active participants in driving strategy and questioning corporate behaviour.

Health and wellbeing has evolved into a vital ongoing priority, rather than a transient trend. This section discusses the key trends, including sustainable diets and the move towards taking more holistic approaches to health.

Never far from the headlines, the **Waste** section explores the hot button topics of plastics, packaging and food, highlighting some great achievements, but also the need to take considered, rather than soundbite solutions.

The **Employees** section shines a spotlight on issues such as food poverty, the living wage, Brexit, recruitment and gender for the foodservice workforce.

Last, but certainly not least, the **Energy, emissions and natural resources** sections have been merged. This section highlights the importance of setting fit for purpose targets to ensure foodservice plays its part in limiting climate change to less than 2°C.

We hope you enjoy the Footprint Sustainability Trends Report 2019, and that more, importantly, it will help guide your efforts. Tweet us your thoughts @footprintmedia #susttrends.

Amy Fetzer

Head of Research and Analysis

Footprint Intelligence

Executive summary

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

In the last two years, foodservice has taken great strides to embed sustainability into everyday business practices. The perfect storm of positive pressure, media campaigns, policy instruments and public expectations have helped to build and drive the paradigm shift towards more sustainable business practices that were already underway.

This transformation can feel inexorably slow at times, and there is still a huge amount of work to be done. Covering the key topics of **Policy and supply chain; Clients and consumers; Health and wellbeing; Waste; Employees** and **Energy, emissions and natural resources**, The Footprint Sustainability Trends Report 2019 enables the foodservice industry to chart this ongoing progress.

It highlights the hottest emerging trends. And it identifies where the greatest opportunities exist for operating more sustainably while remaining commercially successful.

It gives business leaders insight into the opportunities that exist for strengthening their businesses and gaining competitive advantage, as well as identifying issues in urgent need of attention.

Its aim is to openly share challenges and successes to build on best practice and to provide a map to guide foodservice to a more sustainable future.

Leading insights - 2019 Action points

POLICY AND SUPPLY CHAIN

- **Sustainability is becoming business as usual.** There is still a huge amount of work to be done, but the Paris Accord and the Sustainable Development Goals (the SDGs) are helping to drive a sea change. Policy and public expectations are increasing so assess business practices to highlight hotspots for action
- **Legislation is driving industry action.** Legislation, though at times imperfect, is generally accepted to be driving action in certain areas, such as sugar reduction in beverages, packaging, plastics and modern slavery. It is helping by shining a spotlight on problem areas, levelling the playing field and driving collaboration. Many in foodservice are (quietly) welcoming the idea of more legislation to ensure the industry pulls together to tackle multi-faceted, multi-stakeholder problems effectively
- **Media campaigns providing momentum...** The huge range of media campaigns are seen as being largely helpful at putting sustainability issues in the spotlight. They have helped prompt some of the laggards into action, and can be used to get schemes off the ground by helping to drive internal buy in

- **... but campaigns can drive reactive action instead of considered campaigns.** Legislation and media can be drivers for change, but knee-jerk reactions to provide media-friendly soundbites can be counterproductive. Strategies must be based on considered, holistic approaches to ensure solutions are genuinely more sustainable
- **Evidence-based approaches becoming common.** Foodservice is shifting towards more evidence-based approaches. This is the best way to ensure strategies genuinely improve negative impacts, and that they are seen as credible by industry and the public alike
- **The concept of sustainable diets is expanding to include the supply chain.** This means taking action to reduce the impact of the ingredients on the plate. Working with the supply chain to reduce impacts will help insulate foodservice businesses from climate risks and regulation
- **Brexit is not impacting on sustainability strategies.** This is the feedback from industry insiders. But foodservice must use its influence to ensure that commitments remain robust, especially in areas such as animal welfare, antibiotics and waste
- **Blockchain is poised to transform supply chains.** Blockchain is predicted to transform transparency up and down the supply chain in the next five years. Understand how it will change things and be ready for a new era
- **Ethical certifications valuable but the number of marks needs streamlining.** Marks can convey complex messages simply, and provide a valuable shorthand, but the plethora of certification schemes is creating industry and consumer confusion and needs tackling
- **Collaborate, collaborate, collaborate.** From competitors to suppliers, NGOs to producers, pooling knowledge, skills and clout is increasingly recognised as the most effective way to tackle issues

CLIENTS AND CONSUMERS

- **The active client and consumer.** In an interconnected, global age defined by transparency, social media and instant feedback, clients and consumers have moved from being passive to active. Bringing these stakeholders on board is therefore vital to maintaining brand reputation and loyalty
- **Communicating with clients and consumers is key.** These stakeholders are becoming part of the team. Keep them abreast of efforts being made so they can understand the journey and see efforts are authentic
- **Consumers want clarity,** not greenwash or a multitude of different labels and systems, so be consistent, honest and open about efforts
- **Guiding consumer behaviour is still a challenge.** The public wants companies to tackle impacts but might not always accept their role in making it happen. Think carefully about how to bring these stakeholders on board, and appeal to them as citizens not consumers and they'll be much more likely to engage

HEALTH AND WELLBEING

- **Sustainable menus have hit the high street.** Invest in sustainable menus to capture growing market interest, and to help insulate your business from climate risks and regulation
- **Technological transformations are changing menus.** Investigate alternative proteins, aquaponics and other innovations and embrace those with the most potential for each business
- **Foodservice is moving towards a more holistic approach to health.** Individual ingredients like sugar might still be demonised, but the recognition that diets should be viewed in context is growing. This is enabling foodservice to switch focus to overall nutrition, instead of specific nutrients. This shift is supported by government increasingly focusing on calorie reduction to tackle obesity, with calorie reduction guidelines coming next year
- **Sugar is still in sharp focus so keep working hard at sugar reduction.** The public and policy makers expect it
- **Chefs' nutritional education is a priority.** Invest in chefs' nutritional and sustainability education to ensure staff can keep up with and ahead of new market dynamics where health is a top priority
- **Ones to watch: fibre and gut health.** It is a way off yet, but the modern lack of dietary fibre and the modern diets impact on gut health is ringing alarm bells with medical professionals. Do not wait for the storm to hit - tackle it now by increasing fibre, switching to wholegrain where possible and looking at other ways to support gut health.

WASTE

- **Campaigns have pushed waste into public consciousness,** making challenges like single use plastics a priority issue for foodservice
- **Ensure outlets and customers manage waste correctly.** Head office policy must match staff knowledge and understanding, otherwise waste targets will not be met. Customers must also be helped to play their part
- **Tackle packaging** meaningfully and without increasing food waste – badly managed, packaging poses a serious reputational risk
- **Prioritise plastics** and other difficult to recycle packaging such as composite materials, but ensure strategies are workable and will actually lead to reduced impacts. And be ready to collaborate: multi-stakeholder issues usually require a partnership approach
- **Act on disposable cups.** Industry is pulling together to implement considered approaches which tackle the whole supply chain. The infrastructure is coming so there is no longer any excuse for the absence of a workable strategy
- **Tackle food waste as an urgent priority.** Additional challenges are looming. There is increased consumer awareness and media coverage and increasing pressure to report food waste and loss publicly. This is pressing when foodservice contributes 9% of UK, post farm

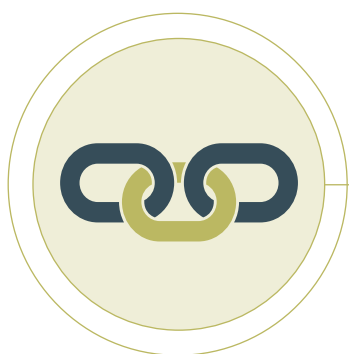
gate food waste (over four times the level of the retail sector)¹. It will save money in the long run, and it is vital to meet target 12.3 of the SDGs: halving global food waste at retail and consumer level.

EMPLOYEES

- **Check staff wages enable them to meet basic needs.** Food poverty should not be an issue for anyone, especially those who work in foodservice
- **Plan for Brexit impacts on the workforce.** Shortages are only likely to get worse so be creative about recruitment
- **Use purpose as a recruitment and retention tool.** Research shows it increases employee satisfaction and motivation. This is especially relevant for young people, so make sure purpose is clearly articulated throughout the organisation
- **Close the gender pay gap.** Gender balanced teams perform better so tackling gender imbalances strengthens business. It also helps to support SDG 5: Gender equality

ENERGY EMISSIONS AND NATURAL RESOURCES

- **Targets must be fit for purpose.** It is not enough to choose targets that work for the business: goals must support Paris Accord commitments
- **ESG issues must be well managed and well communicated.** A company's non-financial performance plays a pivotal role in investment decision making. There are frameworks to help guide measuring and reporting – use these to ensure open communication, and to build the business case for tackling ESG impacts
- **Water impacts are rising up the agenda.** Water stress is growing, so taking steps to tackle operational and supply chain impacts should help build business resilience
- **The kitchen is a blind spot.** Remove the blinkers to ensure the appropriate technology and training is utilised to reduce impacts and costs
- **Embrace energy efficient lighting and equipment.** Ensure suppliers provide data on lifecycle costings, and smash down silos to work across teams to ensure decisions are made on what is best for the business, rather than what suits one business unit's budget
- **Streamline logistics.** With the potential to save emissions, administration, money, pollution and road vehicles, logistics-related efficiencies present multiple opportunities



Policy and supply chain



Leading insights - 2019 Action points:

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- **Legislation is driving industry action.** Legislation, whilst not perfect, is generally accepted to be driving action in certain areas, such as sugar reduction in beverages, packaging, plastics and modern slavery. It is helping by shining a spotlight on problem areas, levelling the playing field and driving collaboration. Many in foodservice are (quietly) welcoming the idea of more legislation to ensure the industry pulls together to tackle multi-faceted, multi-stakeholder problems effectively
- **Media campaigns providing momentum...** The huge range of media campaigns are seen as being largely helpful at putting sustainability issues in the spotlight. They have helped prompt some of the laggards into action, and can be used to get schemes off the ground by helping to drive internal buy in
- **... but campaigns can drive reactive action instead of considered campaigns.** Legislation and media can be drivers for change, but knee-jerk reactions to provide media-friendly soundbites can be counterproductive. Strategies must be based on considered, holistic approaches to ensure solutions are genuinely more sustainable
- **Evidence-based approaches becoming common.** Foodservice is shifting towards more evidence-based approaches. This is the best way to ensure strategies genuinely improve negative impacts, and that they are seen as credible by industry and the public alike
- **The concept of sustainable diets is expanding to include the supply chain.** This means working to reduce the impact of the ingredients on the plate. Working with the supply chain to reduce impacts will help insulate foodservice businesses from climate risks and regulation



Policy and supply chain

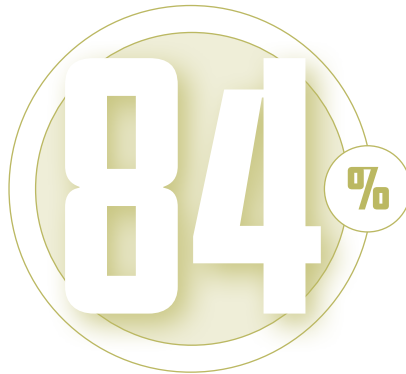
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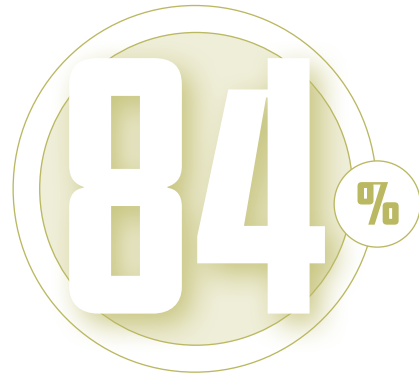


Policy and supply chain

SUSTAINABILITY IS BUSINESS AS USUAL (BAU)



84% of foodservice professionals said sustainability was embedded into everyday business practice.



84% said 'being a responsible business' was a primary driver of their organisation's sustainability efforts.

Sustainability is becoming embedded into everyday business practice

Pop the bubbly and give a big cheer. There are signs that the paradigm shift towards sustainable business may well be truly underway. In Footprint's snapshot survey, 84% of foodservice said sustainability was embedded into everyday business practice. 84% said 'being a responsible business' was a primary driver of their organisation's sustainability efforts. This sentiment is supported by in-depth interviews and industry analysis which indicated there is an increasing sense within foodservice that companies are trying to use their resources responsibly, and that they are gathering the evidence to prove it².

The Paris Accord and the SDGs are driving changes in strategy

The Paris Accord and the Sustainable Development Goals (the SDGs,) along with a myriad of campaigns, movements and policy instruments, have helped in changing the business landscape so that sustainability is increasingly incorporated into business as usual.

The Paris Accord and the SDGs provide business with a framework for setting strategy and purpose. Credible key performance indicators, metrics and targets can then be set and measured to ensure efforts are actually enough to ensure global targets are met.

"There can be a big company mindset to do things the way they've always been done," notes Edwina Hughes, Corporate Responsibility Director, Sodexo UK & Ireland. "But things are changing. What we're trying to do with Better Tomorrow 2025 is to embed those better practices into the manual to outline the business case and sense of purpose so it becomes business as usual."

This is a smart move. A recent survey³ of corporate leaders found that 84% believed that a strong sense of purpose can affect an organisation's ability to transform.



Policy and supply chain

Targets must be meaningful and fit for purpose

"It's great for a business to have an environmental purpose, on carbon emissions for example," noted Tom Cumberlege, an associate director of the Carbon Trust, in a recent Footprint article on the value of purpose⁴. "But the crunch is whether its targets are aligned with those the world is trying to achieve through the Paris Agreement. If they're not, then surely that's not purposeful."

The UK government has also been challenged by researchers at LSE's Grantham Research Institute to update climate change legislation to include a 'net zero' emissions target to more strongly align it with the Paris Agreement.

"Many organisations in foodservice, but also in retail and food manufacturing, are looking at how they can embed sustainability across their own organisation using the framework of SDGs," observes Mark Driscoll, Sustainable Food Systems Consultant, Tasting the Future. "This includes increasing consumer attention to the health impacts of food, incorporating the concept of sustainable nutrition to optimise health, whilst minimising environmental impacts."

The spectre of further regulation is also having an impact. "Policy makers are starting to engage with meeting climate change targets," notes Sue Dibb, Executive Director, Eating Better. "Sustainable diets are not just a trend here today and gone tomorrow. It's the beginnings of a longer-term shift."

For example, analysis by Farm Animal Investment Risk and Return (FAIRR) showed that the implementation of the Paris Agreement will lead some governments to tax meat. This is something already being debated by Denmark and Sweden, and investors in food and agricultural companies are beginning to prepare for the possibility of meat taxes⁵.

CASE STUDY: Using the SDGs to set strategy

Identifying the SDGs that matter to your employees and customers and then aligning them with business strategy is becoming increasingly common.

For example, when Bidfood was resetting its strategy, it surveyed employees and customers on the UN SDGs. This revealed that the top issues for these stakeholders were healthy eating, sustainable menus, responsible choice and food waste.

"So now, we're re-aligning our strategy to incorporate SDG 12: responsible consumption and production because this most closely reflects our role in the supply chain," explains Shirley Duncalf, Head of Sustainable Development, Bidfood. "The world is changing and the SDGs identify the most pressing issues society needs to tackle and they can help us to identify the issues relevant to our business that matter most to our stakeholders."



Policy and supply chain

LEGISLATION DRIVING INDUSTRY ACTION...

Legislation is levelling the playing field and driving collaboration

The sugar tax, the modern slavery act, and looming legislation, such as that on disposables such as bottles, straws and cups, are acknowledged to be helping to drive industry action.

The sense within the foodservice industry is that, as a general rule, legislation can be beneficial as a mechanism to level the playing field and drive industry to work together and find solutions.

However, the lack of action, focus and consistency from policy makers has also been a cause of frustration. This was particularly emotive in regard to the missed opportunities and narrow focus of the long-delayed Childhood Obesity Strategy, and the scuttling of the more multi-layered Public Health Responsibility Deal which many parts of the industry had worked hard to adopt.

"We are aware that we need to find more environmental solutions to issues like disposable plastics," notes one industry insider. "Frustratingly, the more environmental solutions are more expensive and it's taking a while to change that trend. The best thing to happen here would be for the government to say from this date, certain plastics are going to be banned. They need to stop being wishy washy. What we need to be doing and what we're doing takes too long to happen."

Another major operator admitted that as so many sustainability challenges are so multifaceted, "it makes co-ordination a problem. Our business doesn't love regulation – but regulation is pretty much the only way to overcome that."

Modern slavery is putting the spotlight on supply chains

The Modern Slavery Act of 2015 has continued to undulate through foodservice supply chains, putting a microscope of labour practices and helping companies to identify areas of weakness. Those who already had robust auditing and reporting processes reported meeting the Modern Slavery Act requirements more easily. However, a recent report⁶ by the CORE Coalition concluded that major companies, including food and hospitality businesses, are still not doing enough to tackle modern slavery.

Compass Group has tried to tackle the issue in a meaningful way. It has worked to understand which of the commodities it buys or countries it sources from are at the highest risk of incidents of modern slavery. This helped the contract caterer to identify salad and fruits, seafood (particularly prawns) and tea, coffee and cocoa, and agency labour as priority areas. Compass is also focusing attention on the products it buys large volumes of, such as staff uniforms and linens, and disposable items like paper cups and plastic cutlery. Another risk area it has identified is agency labour.

This can pose problems for foodservice because agency labour can be the cross over between employees and the supply chain. In foodservice, whistle-blowing hotlines details may typically be communicated in English when the person who needs it might speak another language. This must be addressed to make sure help is more accessible. Staff turnover can also be used as an indicator of areas where there might be challenges.



Policy and supply chain

MEDIA PROVIDING MOMENTUM...



1/3 of foodservice professionals felt media campaigns such as Blue Planet 2 and Hugh's War on Waste were effective at "divert[ing] effort to tackling that issue as a priority, without compromising other activities"

Media making campaign issues top priorities

From *Blue Planet 2* highlighting the issue of plastic pollution and *Hugh's Fat Fight* and *War on Waste*, to the Evening Standard's *The Last Straw*, the last two years have seen a plethora of campaigns keeping sustainability issues firmly in the spotlight. Plastic, packaging, straws, sugar, disposable cups and food waste have all hit the headlines, driving a wave of commitments from foodservice companies in response.

Nearly a third of foodservice professionals felt such campaigns were effective "divert[ing] effort to tackling that issue as a priority, without compromising other activities".

"Take sugar and health. A lot of businesses are responding to media campaigns through their menus, to show they are listening to what customers want and offering choice. When there is a headline in the newspapers, if you want to keep your customers, you need to be responding to that in a positive way."

Judy Roberts, Creative Director, CH&CO

Driving up standards for children's menus

One campaign which has been successful at driving up standards is the Soil Association's Out to Lunch league table. Since its launch in 2013, the number of chains serving a portion of veg or salad with every children's meal have more than doubled, as has the number which include organic ingredients on the menu. In response to the 2017 league table, Pizza Hut and TGI Friday's committed to discontinuing free refills of sugary drinks throughout their restaurants in 2019.



Policy and supply chain

Media can drive internal buy in

For many in foodservice, media campaigns have been a helpful catalyst for internal change makers as they have provided the much-needed business case to drive action.

"There is no appetite to tackle something unless it becomes a PR issue or causes a negative impact on the business," admitted one industry insider. "Take cups and straws. Suddenly there is a media frenzy over cups or straws and the business starts asking what we're going to do about it. And we're like, 'we did try and talk about this issue previously, and we came to you with a solution, but you weren't bothered.' It's very frustrating, but at least once it is in the media, the business finally starts to listen."

...BUT CAMPAIGNS CAN DRIVE REACTIVE ACTION INSTEAD OF CONSIDERED APPROACHES



Over 1/3 of those surveyed agreed that media events "drive reactive action instead of considered approaches that meaningfully tackle impacts".

There is frustration that sometimes a focus on one particular issue can lead to reactive, kneejerk reactions rather than fully considered solutions. Over a third of those we surveyed agreed that media events such as *Blue Planet II* and *Hugh's War on Waste* "drive reactive action instead of considered approaches that meaningfully tackle impacts".

"Legislation and media attention can be big drivers for change," notes one industry insider. "The latte levy recommended by the Environmental Audit Committee sparked additional pressure in looking at solutions for reusable cups, whilst the Evening Standard straw campaign pushed straws to the fore. The problem with campaigns that are targeted to particular issues is that it makes organisations go into a reactive mode, rather than taking a holistic approach."

The challenge is to address the concerns of the consumer, whilst also ensuring that solutions are actually workable and lead to more sustainable outcomes.

"The biggest driver of change for us is always our customers," explains Chantal Beaudoin, Sustainability Consultant, McDonald's UK & Ireland. "We ensure that we are listening to the issues they care about..."

"A good example of our customer-driven approach is plastic straws. Our customers wanted us to make a change, so we knew we had to follow their lead. We took a two-pronged approach, firstly taking straws behind counter to reduce their use, whilst also investigating how to introduce a new material for our straws. In the end we identified that paper straws would be our best solution, and following a trial in five restaurants with positive feedback from our customers, we decided to roll them out in all of our UK and Irish restaurants by March 2019."



Policy and supply chain

EVIDENCE-BASED APPROACHES BECOMING COMMON

Linking in to this, in the Footprint Snapshot survey, 35% of people cited a lack of knowledge as being one of the biggest barriers to sustainable initiatives. This could explain the movement towards a more evidence-based approach. The majority of those interviewed discussed the need for:

- holistic approaches that viewed issues in context
- strategies to be based on actual impacts instead of options that consumers believe to be better to ensure the best options overall were chosen
- long term approaches that combine business goals with environmental and societal goals, as well as the long term opportunities and risks presented by climate change and the shift towards more sustainable business practices

Charges reduce cup use

When Bartlett Mitchell wanted to tackle disposal cups, it undertook research with Cardiff University to identify the most successful strategies to reducing cup use. The research ended up being presented to the select committee.

The study found that a charge on disposable cups increased the use of re-usable coffee cups by 3.4%, environmental messaging in cafes increased the use of re-usable coffee cups by 2.3%, the availability of re-usable cups led to an increase of 2.5%, and the distribution of free re-usable cups led to a further increase of 4.3%. "While the increases for individual measures were modest," explains Lin Dickens, Marketing Director, Bartlett Mitchell, "the greatest behavioural change was when the measures were combined."

THE CONCEPT OF SUSTAINABLE DIETS IS EXPANDING TO INCLUDE THE SUPPLY CHAIN

Sustainable diets mean tackling supply chain impacts

There is now wider recognition that to meaningfully tackle impacts, foodservice must tackle the supply chain impacts of the ingredients it chooses to put in products or on plates. Attempting to try and reduce the impact of a single product, and targeted work up the supply chains, such as Nestlé's work with its dairy farmers to reduce methane, is becoming much more common. This is supported and driven by sustainable food partnerships and research projects, such as the Oxford Martin Future of Food Programme⁷, and Forum for the Future's Protein Challenge 2040⁸.



Policy and supply chain

Insulate from climate risk and regulation

Failing to understand and looking to mitigate the impacts of their ingredients by reimagining menus and working with their supply chains also leaves business open to climate risk and increasing regulation, especially in the light of the Paris Accord and the SDGs.

A report by the Committee on Climate Change (CCC) concluded that to deliver the necessary cuts in agricultural emissions before 2030, diets do need to shift and food waste must be reduced⁹.

This means that businesses who are not yet looking at the impacts of their ingredients in this way are falling behind from a brand and consumer perception perspective. They are also more vulnerable and exposed than those who are changing their business model to adapt to support more sustainable food systems.

"Increasingly foodservice needs to engage with tier one suppliers," advises Mark Driscoll, Sustainable Food System Consultant, Tasting the Future. "They need to look at where and how they source their key ingredients to build resilience in their supply chain. There is also an interesting trend away from traditional approaches to sustainable agriculture. Some foodservice businesses used certification – fish, palm oil, soya – which was helpful, but certification is not enough. It needs a holistic approach. It's not enough to reduce carbon, water etc.

"Instead, we must ask: How can we produce food with an agricultural lens and restore soil health so it improves water quality from key sourcing areas? Traditional approaches to agriculture won't get us to where we need to be by 2050, we need to look at net positive or regenerative approaches."

Stay savvy to looming risks

And despite some good efforts, industry is not acting fast enough. Agricultural emissions reached a high of 10% in 2015¹⁰, highlighting the slow progress the sector has made compared to the faster pace of decarbonisation in other sectors¹¹.

There are new risks too. Soy has been identified by the WWF and RSPB as a significant, overlooked risk, prompting 23 global companies including McDonald's and Nando's to make pledges¹². Meanwhile, issues such as palm oil and antibiotics remain unresolved with Sustainable Palm Oil producers hit by scandals. Bayer's \$62.5 billion purchase of Monsanto is also causing concern as it would create a corporate giant endangering organic and independent farmers¹³.

There are also concerns that the focus on some high impact meats, such as beef, are leading to switches to products that are still highly problematic, such as chicken. Much of this comes from South East Asia and is associated with thorny issues such as labour, welfare and soy feed.

"Chicken is a key issue coming up for foodservice."

Mark Driscoll, Sustainable Food System Consultant, Tasting the Future



Policy and supply chain

BREXIT NOT IMPACTING ON SUSTAINABILITY EFFORTS



65% of foodservice professionals felt that "Brexit was having no impact" on sustainability efforts

Despite all the doom and gloom about hikes in food prices and impacts on staffing, the Footprint Snapshot Survey found that 65% of foodservice professionals felt that "Brexit was having no impact" on sustainability efforts. "Brexit hasn't created stagnation for tackling particular issues," observes Simon Galkoff, Group Procurement Director, The Casual Dining Group.

Yet with Brexit looms the prospect of new sustainability concerns such as chlorinated chicken. Issues such as welfare standards and antibiotics are likely to rise or fall in urgency depending on what deals are made. Leaders have been busy contingency planning to ensure they are ready for various outcome scenarios. Yet within the foodservice spectrum, there are indications that Brexit is hitting the contract caterers harder.

"Brexit presents a major challenge as it creates uncertainty for our clients," explains Edwina Hughes, Sodexo. "And that's not good for planning and budgets. People don't plan if they don't know what is coming around the corner."

Foodservice's optimistic approach to Brexit and sustainability is in contrast to the CGA's Business Confidence survey which found that 71% of restaurant, pub, bar and coffee shop groups said that leaving the EU has had a negative impact on their business, with only 3% citing a positive impact¹⁴.

Most consumers are concerned that prices will go up¹⁵, and post-referendum data does show that UK consumer price inflation has risen faster than the Eurozone since the Brexit vote¹⁶. A quarter of consumers think Brexit will mean the availability of environmentally friendly or sustainable products will fall¹⁷.

It is not clear yet what impact Brexit will have, but foodservice must use its influence to ensure Brexit is used as an opportunity for the UK to rethink the current food system to achieve more sustainable outcomes. Trade deals must not allow the market to be flooded with cheap food produced to lower environmental standards.

Foodservice must also work to ensure there is no risk of backsliding on issues such as waste and animal welfare when EU targets expire. Indeed, when it comes to animal welfare, the mood at a recent Footprint Forum on the topic indicated that UK foodservice, especially operators such as McDonalds and The Casual Dining Group, would continue to prioritize animal welfare regardless of policy, not least because it is a key consumer and client issue.



Policy and supply chain

BLOCKCHAIN POISED TO TRANSFORM SUPPLY CHAINS

Blockchain is anticipated to transform transparency up and down the supply chain in the next five years. It is expected to drive up standards as poor practices come to light and provide a much-needed tool in the fight against food fraud.

The distributed ledger technologies behind crypto currencies such as Bitcoin, Blockchain has the potential to provide a secure system that allows each stakeholder to trace the source and qualities of a product at every stage, where this data is available. This is especially important in foodservice, where the supply chains are long and fractured compared to retail. Data on the origin and attributes of food can be stored in silos on various paper-based systems, and this can potentially make them vulnerable to fraud.

By providing shared access to and ownership of the ledger - meaning the blockchain is visible to all parties in real time and transactions must be agreed by consensus - Blockchain provides visibility and reassurance that ensure that key attributes, such as country of origin, labour, human rights and animal welfare standards, are as they should be.

"We are very dependent on the supplier telling us what they've done," admitted one national casual dining operator. "We have to take their word, unless we go to Vietnam to check on the prawns. It isn't possible to do this for all of our suppliers, though they are regularly audited, of course. Blockchain sounds like a step in the right direction that could provide that extra reassurance."

The system is expected to compliment other regulatory systems, such as the Food Standards Agency's new systems. These aim to provide "a unified view of all food businesses in England, Wales and Northern Ireland," according to FSA chair, Heather Hancock, in a recent Footprint article. It would mean that "if a restaurant owner falls foul of their allergen responsibilities and causes serious harm to a customer, the agency can quickly track if they own other restaurants that local authorities should check out."

This could be needed more urgently than ever. In the wake of several food hygiene scandals, such as those which effected the 2 Sisters poultry plant and meat supplier Russell Hume, questions have been raised over the industry's ability to conduct quality audits. A recent review indicated that since the horsemeat scandal, the quantity of audits has increased, but the quality has not.

Blockchain is getting the food industry very excited. For example, Co-op has trialled it to track organic food. Whilst in August 2017 Walmart, Nestlé, Unilever and other global food giants announced a collaboration with IBM to identify and prioritise new areas where blockchain could benefit food supply chains.

The ethical marks, such as Fairtrade and RSPCA Assured, also recognise the real opportunity for blockchain to provide "virtual handshakes the whole way through the supply chain to verify and provide assurance," according to Barney Smyth, Partnership Manager, Fairtrade Foundation. Within Fairtrade certified supply chains, this is currently done via an online platform (Fairtrace). Fairtrade has an innovation team looking at how to best utilise such technologies and is considering collaboration with others to support fairer trade. "Blockchain could be really valuable in building consumer trust by showing that chain of custody, really clearly, all the way up the supply chain," explains Smyth.



Policy and supply chain

“Blockchain could also help farmers in the most deprived areas because it can help them access and share more information – but the technology still has a long way to go.” It also has the potential to help SMEs because technologies like smart contracts, if carefully implemented, could enable supply chains to be set up to make payments to subcontractors or finance providers happen automatically with transfer of ownership.

The problem? The cost. Particular for smaller suppliers. “For blockchain to be effective it requires buy-in all along the supply chain – if one piece is missing the entire chain is compromised,” explains Nick Hughes in a blockchain briefing on Footprint¹⁸. “However, experts believe that once the upfront cost of implementing blockchain is met, the savings made from switching away from paper-based or legacy IT systems could be significant.”

Right now, a key challenge is connecting a physical product to its record on blockchain – but digital fingerprinting, which enables the origin of an item to be tracked, such as an apple to its orchard, is also showing promise.

ETHICAL CERTIFICATIONS PROVIDE VALUE BUT NEED STREAMLINING

Ethical certification is still a powerful force in foodservice: 59% of respondents in the Footprint Snapshot Survey said they had actively engaged with ethical certification.

But certifiers have failed to address the confusion caused by the plethora of marks. And with a few high-profile brands such as Sainsbury's adding their own fair-trade schemes into the mix, the market has only got muddier.

Longstanding, well-recognised schemes like Fairtrade Foundation and RSPCA-Assured are still generally seen as providing effective short-hand for consumers to understand what values a product stand for¹⁹. A Footprint/Tate & Lyle Sugars report²⁰ concluded that with consumers keen for more information on ethics when eating out, operators must commit to higher standards. Then they must ensure they communicate this to give consumers the ability to choose a venue based on ethics when eating out.

Marks can also be valuable partners when working to transform supply chains. “We tend to partner with external, expert, stakeholders to deliver things that are meaningful in the industry and for our diners,” says Simon Galkoff, Casual Dining Group. “For example, we work closely with Compassion in World Farming to understand how to get to higher welfare products at the scale needed for our business.”

A help and a hindrance

Ethical certification does have its detractors. “There are an awful lot of them, and they cost us an awful lot of money,” admitted one catering insider. And when caterers have invested in getting to know their supply chain, “you know the provenance of your ingredients, so people are starting to challenge the value of paying for ethical certification.”

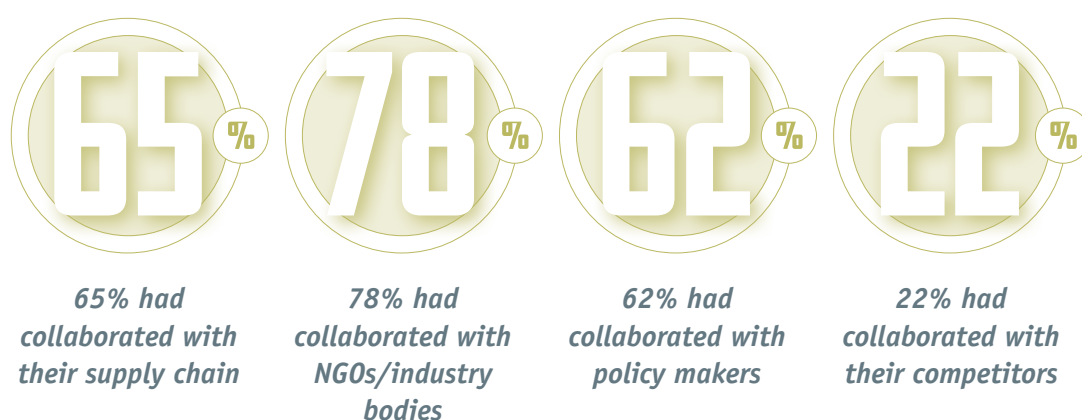
Recent research by the European Parliament²¹ indicated that the answer might be in dispelling confusion by reducing the proliferation of marks. This was certainly the conclusion of a Footprint



Policy and supply chain

Forum²² on the topic. The European Parliament research found that around three quarters of tourism operators, restaurant owners and certification schemes are open to the idea of a European label to certify the quality and environmental sustainability of their activities.

COLLABORATION EVEN MORE EMBEDDED



Collaborate, collaborate, collaborate

As sustainability has become more embedded, joining forces to tackle complex issues is becoming standard. Partnering with NGOs and industry bodies is the norm with nearly 80% of industry insiders reporting collaborating in this sphere. This shift has been happening for a while, but as many of our interviewees observed, the role of the NGO has changed. Whilst NGOs may still use their power to make brands squirm, they have also become important allies in helping to tackle the issues they campaign about.

Take Compassion in World Farming. The animal welfare charity might have shamed Sainsbury's recently when they appeared to backtrack on their animal welfare commitments. Yet the organisation is also working with people from McDonald's to Pret A Manger and the Casual Dining Group to help them meet challenging welfare commitments, such as moving towards cage free eggs across global supply chains.

Organisations such as WRAP, commitments such as Courtauld 2025, awards and forums, such as those run by Footprint, and campaigns, such as those run by the SRA, were all noted by insiders as providing valuable spaces to share ideas and look for joint solutions.

Policy makers are being kept close too: 62% of survey respondents said they had collaborated with policy makers. 22% also reported collaborating with their competitors.

For some, the shift towards collaboration has even become an integral part of their organisation's sustainability strategy. Nestlé UK & I, for example, have made collaboration part of its strategy to transform into a sustainable low carbon business. "We are focussing on creating precompetitive spaces within the industry to drive solutions at pace and a scale," explains Andy Griffiths, Head of Environmental Sustainability, Nestlé UK & I. "We are genuinely trying to leverage that across the key teams throughout industry."



Policy and supply chain

Working together for win wins

Donating food surpluses costs businesses money; usually in transporting the goods to charity. In retail, product is usually in a format where it can be redistributed. But for manufacturers, a big issue is that a lot of the waste product is part packaged or unpackaged so it is not in a format that can be redistributed.

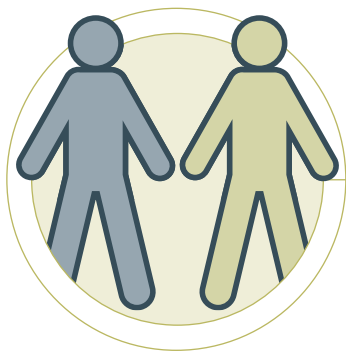
Through the Courtauld Commitment 2025 programme, Nestlé UK & I have teamed up with Company Shop, the UK's largest redistributor of surplus, and other partners to work out how to make food redistribution stack up economically.

The programme identifies and finds solutions for part packaged products to be redistributed within the human food cycle on both a charitable and commercial basis. Nestlé forecasts that the process, across its own UK operations, will enable another 2m meals to go to the charitable sector.

The system increases the overall amount of food in the human food chain whilst also delivering economic incentive to the supplying organisation. In the system, Company Shop sells surplus stock at heavily discounted prices, providing the opportunity for the supplier to get some value back from the product. The system has a blended pricing structure. Some product goes through the Company Shop structure and creates a return, the rest goes to the Community Shop arm of the business which provides groceries to people in need at vastly reduced prices. Overall, this approach also enables investment back into the development of infrastructure for charitable redistribution.

The new process also helps manufacturing sites identify where they can reduce food waste at source by auditing what is causing food waste in the first place. Is it because of incorrect flavouring, labelling or shelf life issues, for example?

"The system can deliver tangible new benefits to food manufacturers or suppliers," explains Andy Griffiths, Head of Environmental Sustainability, Nestlé UK & I. "We're now in a place now where we are looking at how we share that and leverage across supply base – two of the retailers have already expressed an interest in using the system. We developed it on an open source basis so others can pick up and increase levels of redistribution."



Clients and consumers



Leading insights - 2019 Action points:

- **The active client and consumer.** In an interconnected, global age defined by transparency, social media and instant feedback, clients and consumers have moved from being passive to active. Bringing these stakeholders on board is therefore vital to maintaining brand reputation and loyalty
- **Communicating with clients and consumers is key.** These stakeholders are becoming part of the team. Keep them on board with efforts being made so they can understand the journey and see efforts as authentic
- **Consumers want clarity,** not greenwash or a multitude of different labels and systems, so be consistent, honest and open about efforts
- **Guiding consumer behaviour is still a challenge.** The public want companies to tackle impacts but might not always accept their own role in making it happen. Think carefully about how to bring these stakeholders on board, and appeal to them as citizens not consumers and they will be much more likely to engage



89% said taking action on sustainability/being a responsible business is important to our clients/consumers



69% said younger consumers care more about sustainability/being a responsible business



Clients and consumers

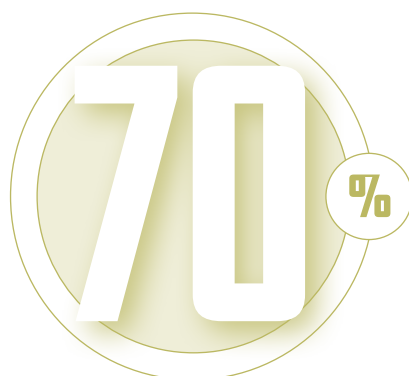
THE ACTIVE CLIENT AND CONSUMER

In an interconnected, global age defined by transparency, social media and instant feedback, the client and consumer has moved from being passive to active. The 2019 Trends report has a new section to reflect this shift.

Trends, such as those identified by the Euromonitor Consumer Trends 2019 report, include the rise in activists motivated by the quest for truth, 'sleuthy shoppers', the desire for clean living; and the tendency to research brands before buying²³. These shifts have changed the relationship between brands and their customers. In the Footprint Snapshot survey, 89% of foodservice insiders said "taking action on sustainability/being a responsible business is important to our clients/consumer".

"There has been a step change relationship between foodservice and consumers regarding responsibility," notes Paul Lumley, Brand and Communications Lead, Nestlé Professional. "The dialogue has increased. Our customers care more because their consumers care more. We are being challenged by our customer to provide information on responsibility and working with our customers has become more collaborative."

THE ACTIVE CLIENT AND CONSUMER



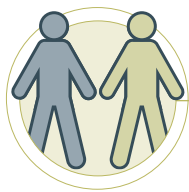
70% are working hard to communicate efforts to clients/consumers



59% believe social media is an important medium to communicate effort to clients/consumers

For some time, there has been a disconnect between industry action on sustainability and consumer awareness of these efforts, even for those businesses that have been built upon values. But with citizens continuing to demand transparency and evidence of responsible business in action, foodservice is working harder to communicate its efforts more publicly.

A recent survey of corporate leaders by Harvard Business Review found that 80% of corporate leaders felt a strong sense of purpose increases customer loyalty²⁴. Footprint research found that 67% of consumers want more information on ethics when eating out²⁵. Ethics also attract customers.



Clients and consumers

93% said knowing more about the ethical credentials of a company's food or products would or could influence where they chose to eat²⁶.

This is certainly the case for those brands that have demonstrated a commitment to sustainability, according to research by Nielsen. "They outperform those that don't," the analysts reported.

Communication on sustainability is occurring through multiple channels with more focus on sustainability issues in media campaigns. In the Footprint Snapshot survey, 59% of participants agreed that "social media is an important medium to communicate our efforts to clients/consumers."

Foodservice companies across the spectrum also reported that they were working to ensure more information is available on corporate websites and in other literature so that when consumers go looking for information on the issues they care about, they can find it.

Yet social media, which has been seen as such a powerful tool to engage consumers, employees and other stakeholders with the business and the brand, is losing its shine in the wake of the Cambridge Analytica/Facebook data scandal and mounting evidence of the harm that social media can have on mental health. JD Wetherspoon raised eyebrows when its founder and chairman, Tim Martin, announced that the pub chain was closing all of its social media accounts because social media was a "waste of time" that was "damaging" to people and to the country²⁷.

"There isn't a 50-character answer to everything," notes one industry insider. "It's complicated to explain the complexities of the business. It is great people are passionate about creating change, but it's hard with these hot button issues when people are only looking at the headline and not the bigger picture. For example, we're basing our straw strategy on life cycle analysis of paper versus plastic to make sure we make the right switch. It's important to be evidence-based, even if that means it's a more complicated story that can't be explained in a couple of sentences."

CONSUMERS WANT CLARITY

The tightrope between transparency and hypocrisy

Getting the message across effectively is a challenge. Employees and customers can see through companies who treat purpose as a business strategy to win talent and customers, according to John Izzo²⁸, an author and consultant specialising in helping brands activate purpose.

Businesses are often wary of being accused of greenwash or hypocrisy when talking about efforts to tackle one element of their impacts, when other issues remain. The research process revealed that the fear of being hit by negative headlines, despite valid efforts, can often be a significant disincentive for the business to go public with its work, or in some cases, even undertake it at all.

This is beginning to change though. In the two years since the last Footprint Trends report, some of those brands interviewed who had been most wary about going public are finally starting to be vocal about their efforts.

The public want more detail about the food they are eating, and evidence of responsible business practices. They also want consistency. Take food labelling. A survey²⁹ conducted for Diabetes UK



Clients and consumers

found that almost three quarters (73%) of the public want all cafés, restaurants and takeaways to use the same food labelling system on their products and menus. 71% of diners feel they do not have enough information about what is in their food.

This is why operators such as Pret A Manger are working hard behind the scenes to put together policy pieces which will make it much clearer to consumers what work is being done in which areas and why.

"We're working closely with suppliers to source sustainable ingredients, but we're not as far along as we'd like," explains Laura Gutowski, Director of Strategy and Innovation. "It's easier when introducing new ingredients. We try to know as much as we can all the way down the chain and audit it. It's part of the reason why we're working on a policy statement so we can be fully transparent for our customers. We've got a way to go but hopefully we can publish the statement soon."

Invest time in being open about efforts

Another barrier to being open can be the fact that getting the message across takes time and energy, as well as ensuring the efforts are represented accurately.

Andy Griffiths, Head of Environmental Sustainability, Nestlé UK & I, notes the difficulties of communicating sustainability efforts, internally as well as to consumers, clients and the industry at large. "We're reviewing our engagement strategy around sustainability because we've made significant step changes, many of which are ahead of our peer group. But that message hasn't always got to some of those key stakeholders. Even internally, it can sometimes be a struggle to keep other parts of the business in the loop."

The media, with its own agenda and business drivers, also has an impact by its response to sustainability efforts, giving air time to hot topics, but skating over important, but less headline-grabbing issues.

"We made a packaging announcement, and there was lot of traction and uptake in the media," notes one industry insider. "When we make an announcement on climate, there is some uptake, but it is totally different to the response to packaging and recycling where there's a huge amount of consumer awareness."

This difference in media and public response can of course influence strategy, sometimes helpfully, but it is crucial not to allow important but less media-friendly actions to get side-lined as a result.

CONSUMERS WANT CLARITY

A frustration for foodservice is often that whilst the consumer expects the business to take action, they underestimate their own role in tackling the problem. Take packaging for example. Many operators are working hard with their waste providers to increase the quality of their recycling, but especially for quick service restaurants who use considerable packaging in the serving of their products, customers must play their part in putting the right items in the right bins.



Clients and consumers

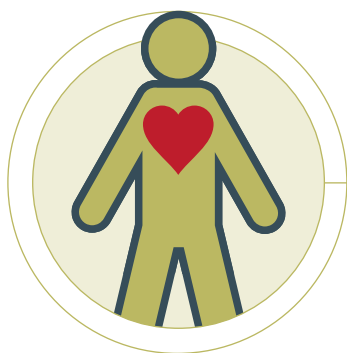
“The question is ‘how can we educate the customer before he gets to the bin?’” says one industry insider. Operators note that customers either feel overwhelmed or do not care so the whole tray goes into one bin, or trays are left on tables. Well-designed bins, such as cup bins which have a restricted aperture for cups only, can help, and many operators, such as McDonalds, are investing in behaviour change projects.

“We are always looking for ways to make it easier for our customers to recycle their waste packaging,” says Chantal Beaudoin, Sustainability Consultant at McDonald’s UK & Ireland. “We have installed recycling facilities in over 1,000 of our restaurants, which enable our customers to pour liquids away before separating paper cups and plastic packaging for recycling. While we know there are challenges with contamination, we are working hard to tackle this with clear labelling on our recycling units.

“It is our job to empower the customer to easily sort and dispose of their used packaging in the best way so that we can maximise how much is recycled. We have the ability to support our customers in understanding recycling better, and that was one of the reasons we introduced our new recycling units in the first place.”

One refreshing approach to engaging customers has come from some research³⁰ from the Food Ethics Council. Existing research³¹ had shown that addressing people as ‘consumers’, rather than ‘citizens’, makes them less likely to care about one another, act collectively, or actively participate in society. So, the Food Ethics Council asked what would happen in the food system if people were addressed as citizens instead. They found being addressed as consumers made people significantly less likely to share resources, such as water, and trust others to share too.

This is a key insight for foodservice as the way consumers and customers are addressed could have a significant impact on how well they engage, and ultimately on the success of sustainability initiatives. So appeal to them as citizens, not on their ability to consume.



Health and Wellbeing



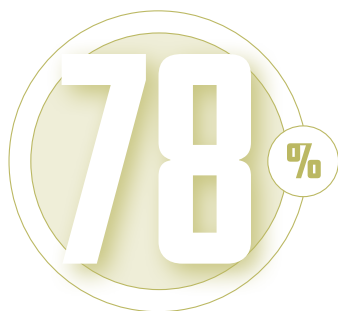
Leading insights - 2019 Action points:

- **Sustainable menus have hit the high street.** Invest in sustainable menus to capture growing market interest, and to help insulate your business from climate risks and regulation
- **Technological transformations are changing menus.** Investigate alternative proteins, aquaponics and other innovations and embrace those with the most potential for each business
- **Foodservice is moving towards a more holistic approach to health.** Individual ingredients like sugar might still be demonised, but the recognition that diets should be viewed in context is growing. This is enabling foodservice to switch focus to overall nutrition, instead of specific nutrients. This shift is supported by government increasingly focusing on calorie reduction to tackle obesity, with calorie reduction guidelines coming next year
- **Sugar is still in sharp focus so keep working hard at sugar reduction.** The public and policy makers expect it
- **Chefs' nutritional education is a priority.** Invest in chefs' nutritional and sustainability education to ensure staff can keep up with and ahead of new market dynamics where health is a top priority
- **Ones to watch: fibre and gut health.** It is a way off yet, but the modern lack of dietary fibre and the modern diets impact on gut health is ringing alarm bells with medical professionals. Do not wait for the storm to hit - tackle it now by increasing fibre, switching to wholegrain where possible and looking at other ways to support gut health.



Health and Wellbeing

SUITABLE MENUS HAVE HIT THE HIGH STREET



78% of foodservice professionals see sustainable menus and nutrition as an opportunity



68% have actively engaged with sustainable menus and nutrition



62% of foodservice professionals agree that "sustainable diets are a significant consumer trend"

The needle has moved on sustainable diets. In our survey, 62% of foodservice professionals agreed that "Sustainable diets are a significant consumer trend". 68% said they were actively engaged in sustainable menus and nutrition. What is becoming ever clearer is that those in foodservice who are not working to identify and provide more planet-friendly options risk failing to meet customer expectations and growing market share.

"The new norm is to have a better range of much more interesting, delicious plant-based choices. If you haven't got that – you're left behind."

Sue Dibb, Executive Director, Eating Better

Growing market

The rise of the flexitarian and veganism, coupled with a greater understanding of the social and environmental impacts of food has led restaurants and manufacturers across the board to change their menus and products to meet demand for sustainably-focussed options. It is estimated that there are now 3 million vegetarians in the UK³², whilst more than half of UK adults (56 per cent) are now adopting vegan buying behaviours³³. More than four in ten young adults are worried about eating meat or have cut it from their diets because of concerns about its environmental impact³⁴.

Sustainable menus or options are typically taken to mean vegetarian or vegan dishes because of the proportionally higher impacts of meat versus vegetables³⁵, though there is growing recognition that ingredients do have to be assessed on a case by case basis.



Health and Wellbeing

"The rise of the flexitarian has been a phenomenal trend over the last few years," observes Sue Dibb, Executive Director, Eating Better. "I'm heartened how foodservice has responded. That they are keen to tell the world and that it is seen as profitable. There is a great synergy between what customers are looking for, what makes companies look good, and doing the right thing re: sustainability and health. It's a great example of the triple win."

"Our customer research tells us that veganism and vegetarianism are become increasingly important," agrees Simon Galkoff, Group Procurement Director, Casual Dining Group. "We're dedicated to listening to our customers and actioning what we learn. As such, extending our range of vegan and vegetarian dishes has been a big focus for our development chefs."

"The rise in flexitarianism and plant-based eating is such an exciting trend as it can help tackle three issues usually competing for priority: nutrition, sustainability and commercial value," observes Beth Hooper, Nutrition Manager, Nestlé. "Shifting to a more plant-based diet is a holistic way to implement dietary recommendations to eat more fibre, beans, pulses and veg while cutting back on saturated fat and eating less red and processed meat. We eat food, not nutrients so it's great to be hearing such a buzz about an overall dietary change rather than a focus on individual nutrients."

"Additionally, moving to a more plant based dietary approach can reduce the environmental impact of our diets and cuts down on what is usually the most expensive item on the plate – allowing us to save money or spend it on higher quality animal products. It makes sense for people, the planet and business, which is why I think it's more than a 'trend' and is here to stay."

Supporting health and the economy

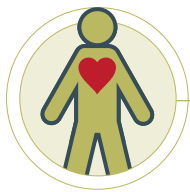
One recent study estimated that switching to plant-based diets could save the UK billions in reduced healthcare costs. If just 10% of the UK population switched to a soy-based diet, it could save £10.9 billion over 20 years. Switching to a Mediterranean diet, defined by large amounts of fruit, vegetables, whole grains, olive oil and seafood and low intakes of meat, could save £7.5 billion. The savings would be direct (for example, in reduced healthcare costs) and indirect (reduced sickness and absenteeism)³⁶.

A report³⁷ from the *Sustainable Food Trust* found that for every £1 UK citizens spend on food, another £1 is incurred in additional costs to society. These hidden costs include diet-related disease, greenhouse gas emissions and environmental degradation.

Driving the trend

Pret A Manger might have started the trend with the launch and subsequent success of Veggie Pret, but operators from across the spectrum from Wagamama, Zizzi, Café Nero and Jamie Oliver Group to Ikea, Wetherspoon and Yo-Sushi, Sodexo and BaxterStorey, are working to take high impact ingredients off the menu and to increase their vegan and vegetarian options.

Several high-profile campaigns, such as Peas Please and Veganuary, have also helped to push the importance of serving and eating more vegetables onto industry and citizen consciousness.



Health and Wellbeing

Innovate to maintain customer interest

Whilst sustainable diets are a major customer trend, innovation and creativity is still crucial to keeping customers happy and coming back for more. It is also important to make sure each category has good variety and options.

Psychology and nudges can help consumers make healthier, more sustainable choices. *Designed with Health in Mind*, a Footprint and Compass Group report, sets out how psychological approaches can help consumers make healthier, more sustainable choices in foodservice.

Marketing is key. Products must be “delicious” and “appeal over and above the more familiar choices,” according to Sue Dibb, Executive Director, Eating Better. “The language and how you position sustainable choices makes a big difference, from where it is listed to changing the positioning, such as by making meat an add on item.”

“We don’t focus on meat substitutes; our focus is on a great tasting dish that everyone will enjoy,” agrees Simon Galkoff, Group Procurement Director, Casual Dining Group. “But marketing is important. We find if we don’t make a big play of a dish being vegan, we get bigger up take – it works better with the whole consumer group, rather than a particular niche. But these products aren’t niche anymore – they’re mainstream menu.”

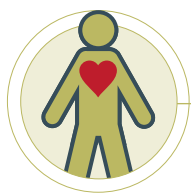
Change the focus to quality and freshness not abundance

There is also an element of changing customer mindsets. Lin Dickens, Marketing Director, Bartlett Mitchell comments: “Say it’s a Friday and customers go to the restaurant at 2.30pm expecting it to be full and bountiful. The only way to do that is by creating a lot of waste. By having a full range available at that time will only mean an increased chance of having more waste by the end of the day. It’s just not practical.

“So, we’re working in partnership with clients and customers to help change their mindsets so they understand that, taking our above example, it’s more responsible to avoid having a huge range of choices on a Friday afternoon. Because it’s all made fresh, when it’s gone, it’s gone. We need dialogue and collaboration between us, clients and the end customers to ensure that we are working together to tackle wastage.”

“We’ve noticed the rise in vegetarianism and flexitarianism and the increased number of people out there looking for meat-free options at Nando’s. In response, we refreshed our vegetarian options last year with the launch of two new burgers and the Veggie Cataplana which are all proving to be favourites with our veggie PERi-PERi fans.”

Henry Unwin, Do the Right Thing Manager, Nandos



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Navigating sustainable options

But there is still confusion within the industry, and for the public, over exactly what sustainable diets mean. In an attempt to clear the confusion, Footprint and Nestlé Professional produced *Action on Sustainable Diets: A best practice guideline for implementing diets that are good for people, planet and business in foodservice*³⁸. This helps foodservice direct and frame their efforts when working towards more sustainable diets.

Eating Better has also produced a report³⁹ which helps when getting down to the nitty gritty of what it means to eat less, but better, meat. It lists a set of criteria for “better meat” which can be immensely helpful for those wanting to make better choices. The criteria encompasses climate, nature, health, livelihoods and other key indicators of sustainability – and maps how common certification schemes perform against these criteria.

“Sustainable nutrition is going to be crucial.”

Andy Griffiths, Head of Environmental Sustainability, Nestlé UK & I

TECHNOLOGICAL TRANSFORMATIONS ARE CHANGING MENUS

There is also a medium-term issue around alternative proteins and an explosion in novel foods such as algae-based food stuffs, sea weeds, insects, and meat replacements. “Things are rapidly changing,” observes Mark Driscoll, Sustainable Food System Consultant, Tasting the Future. “There has been significant growth in small scale local production, urban farming and technology that allows much more local production of food from 3D printing to hydroponics. We’re even starting to see foodservice start to embed hydroponics in its own restaurants in the US so chefs can pick their own salads.”

Other looming innovations include smart phone systems which enable customers to scan recipes to get an instant readout showing from which farm core ingredients came from, and how ingredients travelled from farm to fork, for example.

The growing awareness of a potential market for cultured meat and clean meat is gathering momentum and has the potential to transform farming, but UK Consumers still have a long way to go before they’ll accept lab-grown meat. Recent research found that just 18% would give it a go, and 43% said no way⁴⁰.



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Ikea's "dogless hotdog"

With demand for food expected to increase by 70% by 2050, Ikea is trying to inspire people to try more sustainable ingredients. The furniture retailer has come up with a "dogless hotdog" that has more protein than a real hotdog.

It is made with baby carrots, beet and berry ketchup and roasted onions. It is served in a spirulina bun – spirulina is a microalgae rich in protein, iron and some other essential nutrients. Other innovations include a burger and meatballs made with mealworms.

FOODSERVICE IS MOVING TOWARDS A MORE HOLISTIC APPROACH TO HEALTH

Foodservice still has a tendency to demonise certain nutrients. Sugar is still sweating under the spotlight, whilst saturated fat and salt are not in the clear either. However, there are signs that policy makers and the smart players within the food industry are starting to take a more holistic approach to health which looks at the overall nutritional aspects of a dish, menu or product rather than just one element. Government is increasingly focusing on calorie reduction to tackle obesity, with calorie reduction guidelines coming next year. And, even operators who had not previously employed a company nutritionist, admitted during research that they finally understood the need.

Operators on the front foot have been trying to address health on multiple fronts. This includes:

- Engaging with policy makers such as PHE and regularly attending meetings
- Working with suppliers to improve health traits whilst maintaining quality
- Working with soft drink suppliers to improve the range of lower calorie options, with many operators removing drinks which qualify for the sugar tax from their menus
- Working to provide dishes that help diners meet recommended calorie caps, such as calorie reduced starters and desserts and a range of main courses under 600 calories. As such options can be in line with the One You: Know Your Numbers campaigns (see below), there is also potential for companies to partner with Public Health England with suitable menu ranges.
- Ensuring kids menus are balanced, and include a portion of veg, and adhere to Soil Association pledges such as not advertising fizzy drinks, serving water and ensuring that puddings are appropriate portion sizes
- Working with other teams, such as marketing and menu development, to help manage the tensions between what marketing teams may feel will sell and supporting the Government's anti-obesity agenda
- Looking at how nudges and psychological approaches can drive healthier choices⁴¹, such as McDonalds's digital kiosks driving increases in the uptake of salads and bottled water⁴².



Health and Wellbeing

The Government's One You campaign⁴³ aims to move towards a view which is more geared towards an overall healthy lifestyle, from exercise to food intake. It encourages consumers to stick to 400 calories at breakfast, and 600 calories for both lunch and dinner.

The food industry has also been given five years to cut calories in family foods by 20%. Caterers and manufacturers have been told that they can reformulate products, reduce portion sizes or encourage customers to buy lower calorie options. In the latest move, manufacturers, restaurants, quick service restaurants and delivery companies will all be asked to develop category guidelines ready for publication in Spring 2019.

Junk food advertising has been a major campaign issue for celebrity chef Jamie Oliver's #AdEnough campaign. It may be helping. The second chapter of the Childhood Obesity Plan has outlined plans to reduce the promotion and marketing of unhealthy food and drink. It has also committed to introducing a legislation to mandate consistent calorie labelling for the English Out of Home sector.

A new €60m (£52m) venture capital fund will support "game-changing" companies in the food sector working on everything from the shift to plant-based diets, lab-grown meat and reducing food waste⁴⁴. Nestlé is among the fund's industry backers.

A new marketing fund called VegPower has been launched to make veg "cool and contemporary" and encourage more children to eat their greens⁴⁵. This is to up the 1.2% of food and drink advertising spend that currently goes on vegetables by offering an alternative to the junk food ads children are bombarded with⁴⁶. This joins other campaigns which have worked to change public perceptions towards healthy, often veg-focussed foods, such as the #VegCurious campaign, and soy company Silk's "Do Plants"⁴⁷.

...THOUGH SUGAR IS STILL IN SHARP FOCUS

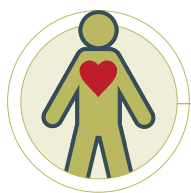
Sugar has remained in the spotlight and looks set to stay with the sugar tax finally in force and the ingredient still central to many policy pressures and campaigns. For example, it was a main feature of *Hugh's Fat Fight*⁴⁸, the celebrity chef and campaigner's 2018 campaign to help tackle obesity.

Foodservice has reacted though, and there has been some impressive action. High street chains including Greggs, McDonald's and Costa, have created a consortium which has pledged to reduce sugar by 20% by 2020. They will also utilise nudges to help customers make healthier choices.

Starbucks has pledged to reduce sugar by 25% by 2025. The coffee chain has taken its worst offenders, such as festive drinks which contained 23 teaspoons of sugar, off the menu, and introduced a range of lighter options.

The drinks manufacturers, from Coca-Cola and Britvic to Nestlé, have reduced sugar by reformulating or reducing portion sizes across their ranges to lift many popular brands out of the tax bracket. The response from the public has been largely positive, with foodservice insiders noting that there had been "no notable backlash from customers."

In fact, the unexpected outcome has been that the manufacturers have been so effective at reducing sugar that the government is concerned that the tax will not deliver the boost to its coffers it had hoped for.



Health and Wellbeing

Clever ways to create the same taste

Nestlé has been working hard to reduce sugar by replacing it with existing, natural ingredients it knows its consumers know and love. This has led to reformulations where Nestlé has managed to increase the milk and cocoa content whilst reducing the sugar in popular treats such as Kit Kat® and MilkyBar®.

The company has also invested in finding a way to change the structure of sugar so it dissolves more quickly on the tongue. This gives the perception of identical sweetness but with much less sugar, and no artificial sweeteners. The first chocolate bar to use this innovative sugar reduction technique, Milkybar® Wowsomes®, was launched in spring 2018.

CHEFS' NUTRITIONAL EDUCATION IS A PRIORITY

With the continued focus on health, the last two years have seen a drive within industry to make nutritional training available, and ideally mandatory, for those working within foodservice. It is key, therefore, to invest in chefs' nutritional and sustainability education to ensure staff can keep up with these new market dynamics.

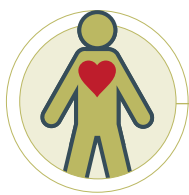
The issue of chefs' nutritional training is expected to rise in prominence with the launch of a pilot nutritional module at Westminster Kingsway College later in the year. The project is a partnership between Nestlé Professional, Footprint Intelligence and Westminster Kingsway that aims to make the case for mandatory nutritional training in catering education by trialling a proof of concept.

Getting nutrition onto the catering education syllabus is anticipated to help create a sea change which, over time, should help to transform the industry from within. Operators agree that having chefs enter the workforce with better nutritional understanding would make a huge difference. It would enable chefs to instinctively consider health impacts, give them the skills to design healthier options and to choose healthier ways to prepare existing options.

It is also expected to help tackle the skills shortage. This is because giving chefs greater understanding of how their work impacts, and could potentially enhance and improve, the lives of those they serve, is anticipated to provide much needed motivation and enhance job satisfaction.

For those already working within foodservice, it is encouraging that many operators are running their own modules. Inexpensive, off-the-shelf options are also available for operators who do not wish to create tailored content, though courses should be accredited by the Association for Nutrition (AfN) or the British Dietetic Association.

UK Hospitality's *Nutrition Guide for Catering Managers and Chefs: For the industry, by the industry*⁴⁹ is an excellent resource for chefs and catering managers. It is especially useful for those in smaller businesses who do not have nutrition resources. It is packed with practical advice, tips and swaps on how to make menus healthier, and how to market them whilst complying with legal obligations. The AfN Competence Framework in Nutrition for Catering also sets out competencies



Health and Wellbeing

for those working in catering in both front and back of house and is useful for organisations devising their own in-house training⁵⁰.

Embrace sustainability education

There is also a rise in the number of sustainability-related food programmes, such as those run by Compassion in World Farming and manufacturers such as Quorn. These focus on showing chefs how to create amazing dishes that have lower impacts on the environment.

Getting teams to embrace health and sustainability

Bartlett Mitchell is working hard to inspire their chefs to think more healthily, and more sustainably. It has hired a dedicated nutritionist to design vegetable-friendly menus and to run vegetarian and health focussed training for its chefs and front of house teams.

It also runs 'Wasted workshops' to try and tackle waste through workshops and online training. The programme aims to get people to think differently about food to prevent waste. This ranges from using more seasonal, robust ingredients in the first place to prevent spoilage, to finding imaginative things to do with good food that previously went in the bin, such as making bread out of leftover porridge. The programme also covers what happens to that waste at the end and encourages sites to incorporate systems such as wormeries and dry composters.

One to watch: fibre could be the new sugar

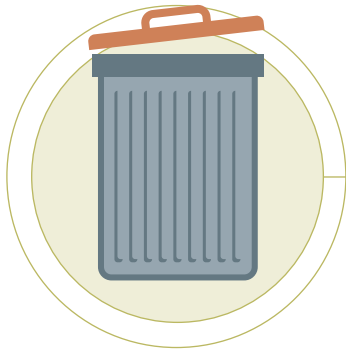
91% of men and 96% of women do not meet their recommended 30g of fibre a day⁵¹. Fibre helps to keep the digestive system healthy and prevents constipation. There is increasing recognition within industry and in healthcare that the lack of fibre in diets is becoming a major public health concern.

Focussing on food options that are higher in fibre and which support gut health support positive communications about adding something beneficial rather than removing something negative. Fibre is also less energy dense than other nutrients so including more fibre can be a useful tool to reduce calories per 100g.

These factors mean focussing on fibre now is a smart move.

Many in foodservice are already increasing their use of wholegrain. Those that have, such as Sodexo, who have a commitment to wholegrain in its Green & Lean menu range, report it has not had any subsequent negative impact on customer satisfaction.

Manufacturers too have found creative ways to increase fibre. Some are using it as a substitute for sugar. Nestlé, for example, launched 30% less sugar Rowntree's® Randoms and Fruit Pastilles which saw some of the sugar replaced with a maize fibre. Similar savings were made in Nesquik® chocolate 30% less sugar chocolate milk, again in part by substituting fibre for sugar.



Waste



Leading insights - 2019 Action points:

- **Campaigns have pushed waste into public consciousness**, making challenges like single use plastics a priority issue for foodservice
- **Outlets and customers must manage waste correctly**. Head office policy must match staff knowledge and understanding, otherwise waste targets will not be met. Customers must also be helped to play their part
- **Packaging must be tackled** meaningfully and without increasing food waste – badly managed, packaging poses a serious reputational risk
- **Addressing plastic**, and difficult to recycle packing such as composite materials is a priority, but ensure strategies are workable and will actually lead to reduced impacts. And be ready to collaborate: multi-stakeholder issues require partnership approaches
- **Action on disposable cups**. Industry is pulling together to implement considered approaches which tackle the whole supply chain. The infrastructure is coming so there is no longer any excuse for the absence of a workable strategy
- **Tackling food waste is an urgent priority**. Additional challenges are looming. There is increased consumer awareness and media coverage and increasing pressure to report food waste and loss publicly. This is pressing when foodservice contributes 9% of UK, post farm gate food waste (over four times the level of the retail sector)⁵². It will save money in the long run, and it is vital to meet target 12.3 of the SDGs: halving global food waste at retail and consumer level.





Waste

CAMPAIGNS HAVE PUSHED WASTE INTO THE PUBLIC CONSCIOUSNESS

Waste continues to be a hot topic, kept front of mind by continued campaigns and media focus. Long a topic of discussion in sustainability circles, the pressing issue of plastic waste has rocketed to the fore of consumer consciousness by media events such as the BBC's *Blue Planet 2* which brought home the persistent problem of poorly managed plastic waste. Food waste and disposable cups, highlighted by past campaigns such as *Hugh's War on Waste*, have also continued to gain traction and momentum.

Foodservice professionals felt such campaigns could be helpful at "divert[ing] effort to tackling that issue as a priority," though this could lead to other activities being compromised or more reactive approaches being taken.

WRAP's Courtauld 2025 has been hugely effective at co-ordinating and driving industry action. This ranges from providing the evidence base for action, to helping to drive the light-weighting of packaging and looking at ways to extend the shelf life of food. The high standard and volume of entries for Footprint's inaugural Waste2Zero awards in 2017 demonstrated how tackling waste has become a core business discipline.

OUTLETS AND CUSTOMERS MUST MANAGE WASTE CORRECTLY

Yet, despite the rash of impressive pledges and commitments, many foodservice sites are confused about how to deal with their waste correctly. This is leading to pledges falling short due to confusion or lack of effective communication. It is important to invest in staff training in waste management to ensure waste targets are met.

It is also key to bring customers along too. As discussed in **Communicating with the customer**, customers expect action but their role in making it a reality can often be the difference between waste becoming a problem, or part of the circular economy. For example, as discussed in **Guiding consumer behaviour**, the consumer's role in the disposable of take away food containers can ultimately be the deciding factor in whether the item enters the correct waste stream. But many in foodservice admitted that influencing customer behaviour was a massive challenge that required more combined effort on finding effective behaviour change strategies.



Waste

TACKLING PACKAGING

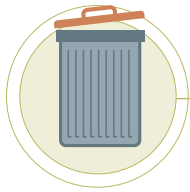
Packaging has become a core focus for NGOs, media and citizens, with a rash of impressive commitments to boot. The core challenge in foodservice, notes Andy Griffiths, Head of Environmental Sustainability, Nestlé UK & I, is how the industry effectively manages packaging challenges in a way that does not result in an increase in food waste.

“Society, politicians, media – the world – is taking a great interest in the UK packaging waste and packaging recycling,” notes Martin Kersh, Executive Director, Foodservice Packaging Association. “This is partly because many major NGOs such as Greenpeace and Friends of the Earth are all based in London. This means the UK has been the focus for much of their campaigning action.” This means a lack of action or failing to live up to commitments is likely to lead to media attention. Failing to tackle the issue meaningfully is a considerable reputational risk.

PACKAGING PLEDGES:

Foodservice has been making pledges thick and fast. This is a sample selection of the range of industry commitments.

- McDonald's will make all of its packaging from renewable or recyclable sources by 2025
- Danone-owned Evian has pledged to make all of its plastic bottles from recycled plastic by 2025
- Cranswick, a British farm to table business, has committed to reduce plastic use by 50% by 2025, and to only use plastic that is recyclable
- Unilever has committed to using 100% recyclable plastic packaging by 2025 and will reduce the weight of the packaging it uses by one third by 2020
- Starbucks has announced plans to invest £7m in funding entrepreneurs to develop a recyclable, compostable coffee cup solution within the next three years
- Costa has pledged to pay an extra £70 for every tonne of paper cups collected to drive the market in disposable cup recycling and to fund investment in infrastructure. The announcement has been made in partnership with five national waste collectors and with the support of the three UK paper mills currently able to recycle takeaway cups
- Pret A Manger will give customers a 50p discount for using reusable cups; a move that is expected to cost the company millions
- Nestlé has announced its ambition to make 100% of its packaging recyclable or re-usable by 2025⁵³
- Just Eat is asking customers to opt out of receiving plastic cutlery, straws and sauce sachets for UK deliveries and is investing in research for alternatives to single use plastics
- Iceland has promised to eliminate plastic packaging from its own brand products by the end of 2023



Waste

PLASTIC PRIORITY

Tackle plastic as a priority

The public is hungry for action and responsible plastics is seen as a key consumer trend. Regulation is looming with sales of straws and stirrers potentially banned from early 2019 and pledges to introduce deposit return schemes for single use plastic containers⁵⁴.

Since plastic pollution has hit the public consciousness, behind the scenes action has been turbo charged and fast tracked. Food industry players have been removing stirrers and straws – and reporting very little pushback. Alternatives are being trialled in outlets across the spectrum from McDonald's to River Cottage. Foodservice has also been making plastic pledges thick and fast (see panel **Packaging pledges**) and the industry is working hard to come together to tackle the issue jointly. This provides the opportunity to also tackle other hard to recycle packaging such as composite materials which also need urgently addressing.

However, as discussed on page 15 **...but campaigns can drive reactive action instead of considered approaches**, it is important not to make knee jerk reactions.

Take a partnership approach

Many businesses within foodservice are acutely aware that they are not big enough to drive change on their own. Retailers, operators, manufacturers, waste management providers and packaging suppliers are therefore getting around the table to find joint solutions. WRAP's Courtauld Commitments have been extremely effective in this regard.

The UK Plastics Pact is one of WRAP's collaborations. It aims to "create a plastic system that works – a circular economy where plastic is valued and doesn't pollute the environment"⁵⁵.

The coalition brings brands such as Unilever, Pizza Hut, Tesco, Coca Cola, Nestlé and Innocent together with packaging suppliers such as Plastipak and waste processors like Veolia⁵⁶. Members are responsible for over 80% of the plastic packaging on products sold through UK supermarkets.

Commitments include eliminating problematic or unnecessary single-use plastic packaging through redesign, innovation or alternative delivery models; and for 100% of plastic packaging to be reusable, recyclable or compostable by 2025.

Many in foodservice are also looking deeper into the issue. An example of this is by focussing on using higher-value plastics so recyclable products end up recycled and not incinerated or landfilled because of wider market forces, such as the changes in plastics being accepted by China.

"Our plastics pledge isn't about competitive advantage," notes Jim Brisby, Group Commercial Director, Cranswick. "It's about encouraging the industry to come together to tackle problems. *Blue Planet 2* was a massive stimulus – it's time to do something – to stand up to be counted.



Waste

“But we need to look at the real impact of plastic use – not just with the consumer facing view on the plastic, but where plastic is used in various parts of the supply chain. Fundamentally, for a business like Cranswick, we’re not experts on packing. We’ll be pushing our suppliers to come up with solutions. Then, when we’re making progress, we will push in other directions to get the right infrastructure to deal with this waste.”

One good churn

Gelf Alderson at River Cottage HQ was sick of seeing plastic milk cartons in the recycling. So, he teamed up with Bruton Dairy, the restaurant’s milk supplier. Together, they have introduced a system of reusable urns which, it is hoped, will save money, as well as resources, in the long run.

ACTION ON DISPOSABLE CUPS

Disposable cups have seen a sea change in approach. Consumers want action (see box **Consumers want action on waste**). And again, regulation is looming in the form of the potential so-called “latte levy” of 25p for disposable cups. Major strides have been made across foodservice but for those who are still on the fence, the pressure is mounting.

The Paper Cup Recovery and Recycling Group (PCRRG) has helped to bring industry together to improve the collection and recycling opportunities for paper cups. It works to identify and support solutions that sustainably transform used paper cups into a valuable resource. Members include McDonald’s, Bunzl, Nestlé, Huhtamaki, the FPA, James Cropper, Starbucks and Seda.

In 2017, the PCRRG and its members focused efforts on increasing paper cup collection points to make recycling cups on the go more convenient. There are now more than 4,000 collection points. Hundreds more are planned by the end of the year. Scaling up paper cup recycling is still a challenge though. With interest from operators across the spectrum, insiders report that they would like to get involved but that infrastructure is struggling to keep up with demand. The situation is changing fast though.

Costa is one operator taking a proactive approach. It is trying to create a new route to recycling by committing to recycling half a billion cups a year by 2020. This is achieved by paying a supplement to the waste collectors (Veolia, Biffa, Suez, Grondon and First Mile) for every tonne of coffee cups collected. This makes it commercially viable for waste collectors to put in place the infrastructure and processes to collect, sort and transport coffee cups to recycling plants⁵⁷.



Waste

CONSUMERS WANT ACTION ON WASTE:

- 82% of Brits believe coffee shop outlets should provide recycling bins
- 75% agree restaurants should use recyclable packaging for takeaways
- 40% of out-of-home hot drinks consumers say they would not mind paying extra for drinks served in 100% recyclable cups
- 58% of consumers believe coffee shops should give a discount to those bringing in reusable mugs
- Consumer's environmental intentions are confounded by time pressure, whilst the hassle of carrying reusable coffee cup limits the popularity of scheme⁵⁸
- 74% of consumers support the introduction of a levy or deposit scheme for single use cups⁵⁹

ONE TO WATCH: HOME DELIVERY WILL CHANGE PACKAGING DYNAMICS

The rise in home delivery is also expected to have an impact on packaging options. This is because the requirements to keep an item warm without it going soggy during delivery are totally different to those when serving directly to go. The challenge will be providing packaging options that deliver, without shoring up new environmental impacts and challenges.



Waste

TACKLING FOOD WASTE IS AN URGENT PRIORITY

Increased consumer awareness, media coverage and pressure to report food waste and loss publicly are combining to make food waste a top priority. This is understandable as foodservice contributes 9% of UK, post farm gate food waste. This is over four times the level of the retail sector⁶⁰. But the good news is that tackling food waste will save money in the long term, and it is vital to meet target 12.3 of the SDGs: halving global food waste at retail and consumer level.

A WRAP and World Resources Institute Report calculated that food sites, including caterers, retailers and manufacturers, could expect to save \$14 for every \$1 spent on food loss and waste reduction. A follow up study found that a hotel could expect to save \$5 for every \$1 spent.

This means the upfront expenditure of consultants, equipment and staff training are likely to be paid back through savings made in food costs, waste management, and by increasing revenue by selling more food that would have been wasted.

And foodservice has taken up the challenge. Those who are not segregating food waste, installing technology or doing research to look at ways to minimise waste, are fast becoming the exception.

There is creativity in the approaches too:

- **Putting bins in view.** Some operators are trialling putting their electronically-monitored food waste bins consumer-facing so that diners are directly aware and engaged in their part in contributing towards food waste
- **Keeping one day delivery free.** On some corporate sites which shut down on weekends, Fridays have been designed as no delivery days to encourage staff to be creative in creating recipes with the produce they already have and to use up fresh food before the weekend
- **Recruiting the consumer.** At Sussex University, a Compass site, students have been recruited to co-create their own solution. The project, a partnership with Hubbub, has given students a budget and a light brief to come up with imaginative ideas to tackle food waste
- **Finding secure ways to share.** Pret A Manger, which has always had a strong approach to food waste, has now turned its attention to those hard to tackle sites, such as airports. New initiatives are being tested which ensure food gets to those in need without compromising security
- **Using tech.** From intelligent food labelling that can sense when food will go off to Olio, a food waste app which partners businesses with surplus food with volunteers to collect it, technology is providing a multitude of ways to tackle waste
- **Going cashless.** Schools, such as those in the London Borough of Havering, are rolling out cashless systems such as Squid. These enable the children to register their menu preference on registration. It creates less plastic waste than lunch bands, and children are less prone to swapping at the last minute, which leads to waste. It might take a shift in mindset, but such systems could be adapted for the corporate environment so workers could order from their desk to reduce waste and wait times



Waste

- **Tackling waste.** Greene King has transformed its approach to food waste by partnering with Kuehne+Nagel to roll out food waste back hauling across its sites. Greene King has also been working with Footprint to identify food waste hotspots and how to tackle them within its business.

“Doing research to understand our own impacts helps us learn what we can do as a group to improve. People from different departments have different priorities, so we are looking at how to flow the findings through the business. But doing the right thing usually generates commercial benefits, so it’s win, win.”

Richard Tubey, Supply Chain Project Manager, Greene King



Employees



Leading insights - 2019 Action points:

- **Staff wages must enable them to meet basic needs.** Food poverty should not be an issue for anyone, especially those who work in foodservice.
- **Plan for Brexit impacts on the workforce.** Shortages are only likely to get worse so be creative about recruitment.
- **Purpose can be a recruitment and retention tool.** Research shows it increases employee satisfaction and motivation. This is especially relevant for young people, so make sure purpose is clearly articulated throughout the organisation.
- **Focus on gender balance.** Gender balanced teams perform better so tackling gender imbalances strengthens business. It also helps to support SDG 5: Gender equality.





Employees

STAFF MUST BE ABLE TO MEET BASIC NEEDS



80% of foodservice insiders see employee health and wellbeing as a business opportunity

Even though the increase in National Minimum and National Living Wage has helped to increase wages, the focus on food waste and food redistribution to tackle food poverty highlights a foodservice irony. Low wages and zero hours contracts can mean that those who work in foodservice can be in poverty themselves.

The solution, campaigners such as Professor Martin Caraher, Professor of Food Poverty and Health at City University, argue, is not to get better at food redistribution, though this is important. Instead, foodservice's responsibility is to ensure that wages, contracts and staffing systems actually enable staff to meet their basic needs.

For businesses with budgets already squeezed by higher food prices, this can be a challenge. "It's right that we should pay people what they deserve," agreed one industry insider. "But as a business we've had to work really hard to find efficiencies and to save a lot more money to mitigate the introduction of the living wage."

"The answer, is not in cheap food, but in ensuring decent livelihoods in a sector where low pay is rife and there are many zero hours contracts. It's a massively important issue for foodservice."

Dan Crossley, Executive Director, Food Ethics Council



Employees

Alleviating food poverty for your customers

Balancing ethics and budgets can be a challenge, especially when you know that the population you are feeding is on a tight purse string. This can be a particular challenge for those in higher educational environments.

"We are beginning to see changes in the sales profile of our customers," notes Julie Barker, Director of Accommodation and Hospitality Services, University of Brighton. "Students are more discerning, we are also seeing the emergence of food poverty, so we have been working on how can we respond to that by providing nutritionally-balanced meals at a good price so customers don't use their limited resources on poor nutritional offers.

"Our stance, morally and ethically, is about covering costs, making sure we can deliver for our students. It's a really fine balance as we are not subsidised, but we're very conscious of the limited resources of most of our student customer base. We want to provide the best we can within tight constraints."

PLANNING FOR BREXIT IMPACTS ON THE WORKFORCE

With EU workers making up 24% of hospitality's workforce⁶¹, Brexit is making itself felt when it comes to employees. Having strategies to deal with resulting shortages is therefore vital.

UK Hospitality is working hard to find solutions. Innovative ideas include changing recruitment techniques to match up candidates to roles using smart technology and using Premier League clubs as centres for running job fairs.

PURPOSE CAN BE A RECRUITMENT TOOL

Corporate responsibility can be a valuable tool in this capacity. In a survey of corporate leaders by Harvard Business Review Analytics and EY's Beacon Institute, 89% said a strong sense of purpose drives employee satisfaction⁶². A YouGov survey found that more than a quarter of managers (27%) in British companies would be likely to accept a salary cut to work for a company that has a clear purpose beyond profit, according to new research.

Around a third (32%) of the 2,001 managers quizzed would consider leaving their job if a greater purpose was unclear, while more than half (53%) would do so if their company's values and purpose did not align with their own⁶³. This is reflected in many other studies, and is especially notable amongst younger generations, in particular Gen Z. 69% of those who took part in the Footprint Snapshot survey agreed that "Younger consumers care more about sustainability/being a responsible business".

Gen Z are typically categorised as those born between the mid 90s and mid 2000s, and as they age, they are making up an ever-increasing proportion of the work force. 89% are personally concerned



Employees

about the environment, and they're prepared to take action to combat it⁶⁴. Another priority? To work in a responsible business.

According to Gary Hunter, Vice Principal, Westminster Kingsway College, catering students are "very passionate" about sustainability issues such as food waste, plastics, health and wellbeing. They are engaged with the issues more than ever before, and sourcing sustainable ingredients is a real priority.

Foodservice operators from Bidfood to the Casual Dining Group note the higher expectations of this age group. Interviewees noted the benefits to the business that results when employees are motivated by working for an employer who genuinely puts values and ethics at the heart of its business.

For foodservice businesses, a genuine sense of purpose could be an invaluable recruitment and retention tool as Brexit makes the existing talent shortage more acute.

FOCUS ON GENDER BALANCE



54% of industry insiders said their organisation was actively engaged in tackling gender and diversity issues



47% see gender and diversity as an opportunity

Close the gender pay gap

The publication of gender pay data showed that foodservice is the most equal of any British sector, with a gap of just 1% compared to 25% in construction and 22% in finance and insurance. But a Footprint analysis of the biggest contract caterers found that the difference in pay gap between contract caterers ranged from between 5.1% at OCS to 34.1% at Aramark⁶⁵.

Yet gender balanced teams achieve better results, according to a new report⁶⁶ by Sodexo. The global, five-year study of 50,000 Sodexo employees found that teams managed by a balanced mix of men and women were more successful in areas including employee engagement, client retention and health and safety.



Employees

Gender-balanced management reported an employee engagement rate that was 14% higher than other entities. Client retention rates were 9% higher, and the number of accidents decreased by 12%.

This is one reason why tackling gender, diversity and inclusion issues is now being seen as an opportunity. Nearly half of those who took part in the Footprint Snapshot survey saw it as an opportunity, whilst over half said they were actively engaging with the issue.

Supporting gender equality is also the central tenant of SDG 5: Gender equality. Leaders in foodservice are recognising how they can play a role supporting this in the wider community, through their local community and through their supply chain, especially with commodities such as cocoa and coffee where fair-trade programmes can help with capacity building and women's cooperatives in countries such as West Africa.

Bee-ing part of the community

Successful campaigns work on multiple levels. Bidfood's 'To bee or not to bee' campaign to encourage general action to support endangered bees energised staff, clients and customers, whilst involving the community.

Sustainable Development Coordinators were provided with a menu of activities to inspire them, from creating bee gardens or setting up hives to donating waste sugar for feed local bees. Competitions then tracked activities and children were invited to submit drawings and a calendar was created of the winning entries. This broad approach created wide appeal.

"All the sites engaged in it," explains Shirley Duncalf, Head of Sustainable Development, Bidfood. "The campaign raised money for beekeepers, encouraged employees to have bee hives on their sites, create bee-friendly areas and raised awareness at all our locations regarding what action could be undertaken to help bees. It has energised quite a few of our customers too – it resonated with them as it linked into food security, food and farming."



Energy, emissions and natural resources



Leading insights - 2019 Action points:

- **Targets must be fit for purpose.** It's not enough to choose targets that work for the business: goals must support Paris Accord commitments
- **ESG issues must be well managed and well communicated.** A company's nonfinancial performance plays a pivotal role in investment decision making. There are frameworks to help guide measuring and reporting – use these to ensure open communication, and to build the business case for tackling ESG impacts
- **Water impacts are rising up the agenda.** Water stress is growing, so taking steps to tackle operational and supply chain impacts should help build business resilience
- **The kitchen is a blind spot.** Remove the blinkers to ensure the appropriate technology and training is utilised to reduce impacts and costs
- **Embrace energy efficient lighting and equipment.** Ensure suppliers provide data on lifecycle costings, and smash down silos to work across teams to ensure decisions are made on what is best for the business, rather than what suits one business unit's budget
- **Streamline logistics.** With the potential to save emissions, administration, money, pollution and road vehicles, logistics-related efficiencies present multiple opportunities

TARGETS MUST BE FIT FOR PURPOSE

With waste and health hogging the limelight, energy and emissions have not been receiving the same media hype. Tackling emissions is still key to meeting the Paris Accord commitments, and emission reduction is still integral to most foodservice sustainability strategies and to organisational priority lists. Although commitments have not gained quite the same column inches as waste or health pledges, foodservice is still setting targets and working to reduce energy use.

The challenge for foodservice is to ensure that these targets are actually fit for purpose. It is not enough to choose targets that work for the business. The question must be asked: are targets enough to meet Paris Accord commitments?



Energy, emissions and natural resources

ESG ISSUES MUST BE WELL MANAGED AND WELL COMMUNICATED

High profile social and environmental incidents, such as the diesel emissions scandal, have also highlighted how damaging environmental, social and governance (ESG) issues can be if not appropriately managed.

This has led to an increased demand from investors for high quality, comparable nonfinancial disclosures. Indeed, an EY investor survey⁶⁷ revealed that a company's nonfinancial performance plays a pivotal role in investment decision making. Investors are decreasing and monitoring holdings more closely due to concerns over stranded assets, whilst a history or risk of poor governance would rule out a prospective investment immediately.

This has led to an increase in efforts to account for natural and social capital. This is often through the use of the SDG framework, in combination with the International Integrated Reporting Framework and the Natural and Social Capital Protocols.

Building the business case for tackling ESG impacts

Nestlé, for example, is working with 3Keel to understand how to create the business case for shared interest in natural assets. The project aims to identify opportunities to incentivise farmers or land managers to modify some of their farming practices or introduce additional practices within land management portfolios which deliver real benefits. This is from a soil, water and habitat perspective, but also helps highlight approaches that are economically beneficial for various stakeholders as well.

Examples include introducing fenced sections of river to prevent cattle from damaging water courses or changing the direction a field is ploughed to modify the flow of rainwater and pollution into a river. "It is much more cost effective for insurance companies to invest in preventative strategies for issues like flood risk and agricultural pollution," argues Andy Griffiths, Head of Environmental Sustainability, Nestlé UK & I. "The idea is to bring together shared interest and leverage it back into nature."

Take their 'Milk Plan'. Utilising the Landscape Enterprise Network (LENS) model, it brings together partners UK dairy farmers, academics, the Game and Wildlife Conservation Trust and Rivers Trust. The coalition has developed a list of interventions. These help farmers to understand the opportunities to assess which intervention might be the most beneficial, and what impacts each has on productivity and the natural environment. The system then awards points for introducing the interventions. These points then give the farmers an additional per litre payment on top of the normal milk price.

WATER IMPACTS ARE RISING UP THE AGENDA

The United Nations predict that global demand for fresh water will exceed supply by 40% in 2030 due to climate change, human action and population growth⁶⁸. Water, as was reported in the Footprint Sustainability Index Trends Report 2016, is still largely an elephant in the room.



Energy, emissions and natural resources

The launch of WRAP's new Water Ambition is helping to drive action. Part of its Courtauld Commitment 2025 project, it requires signatories, which include Bidfood, Tesco and Nestlé, to monitor water use and improve efficiencies in their own operations, whilst working with their supply chain to tackle impacts upstream.

Deregulation has also led to more proactive water management as businesses look at new contracts and tendering out. However, efforts still seem to be mainly focussed in washrooms, not kitchens. This means a huge tranche of impacts are not being tackled.

With supplies finite, and growing pressures on the resources available, the issue of water is only going to become more pressing. Tackling it now, both operationally and within the supply chain, is the smart move.

Tackling supply chain impacts

Cranswick, a British meat supplier, has managed to reduce their overall consumption by nearly 15%, and is on target to reduce water use by 20% by 2020. This has been achieved by introducing innovations such as spray and steam systems instead of baths in its meat processing facilities.

THE KITCHEN IS A BLIND SPOT

When it comes to resource management, the research revealed that whilst there is plenty of activity which goes on to save energy and water in other areas of the building, many insiders noted that the kitchen itself can be a blind spot. With energy costing up to 45p per cooked meal⁶⁹, reducing resource use in the kitchen has the potential to save serious money whilst reducing impacts.

One senior executive at a national operator interviewed for this research noted that whilst the business had been busy implementing automated water meters at sites, fitting water saving devices in cisterns and aerators in taps in the washroom, there "hasn't been much focus on water saving in the kitchen."

The reason, the executive suggested, could be down to time and training. "We found where we're able to put equipment in place - it's delivered a win. It's much easier than constantly training people - who then move on to another job. Yet if we install technology in our sites, it's working from day one."

Removing the blinkers to identify and install appropriate kitchen technologies and investing in staff training could therefore provide significant benefits, both financially and in helping to reduce resource use.



Energy, emissions and natural resources

EMBRACING ENERGY EFFICIENT LIGHTING AND EQUIPMENT



*Over 50% of respondents
view energy efficient lighting
equipment as an area of
opportunity*



*Over 50% of
foodservice insiders
report being actively
engaged in this area*

Recent research by Footprint and Hoshizaki⁷⁰ has shown that despite a desire to invest in energy efficient equipment, the lack of comparable consumption and life cycle costing data can be a major barrier for many operators. Price and functionality instead remain the primary considerations when purchasing equipment. The fact that many business units operate in silos stymies a whole-life costing approach as procurement budgets are not linked to maintenance and energy management budgets.

Operators can overcome this in two ways. First, by demanding comparable whole-life costing data from suppliers. Second, by ensuring they smash through any silos in their own organisation to ensure decisions are based on lifecycle costs.

For some businesses, factoring in whole-life costing alongside functionality considerations is par for the course, according to one senior purchasing insider. "The key is to keep each function in regular communication, and to involve each stakeholder so that purchasing briefs can be developed with the input of all parties."

The benefits of investing in energy efficient equipment are usually clear, so gathering data is vital to making the business case. "We have good evidence across the business which shows cost savings when we have changed to more energy efficient equipment," says Edwina Hughes, Corporate Responsibility Director, Sodexo. "This makes it easier to persuade the clients to invest."



Energy, emissions and natural resources

STREAMLINING LOGISTICS

Road haulage is responsible for a huge chunk of the EU's CO₂ emissions, but with carbon savings usually equated with cost savings, streamlining logistics is moving from leading practice to standard practice. Often done by consolidating deliveries and incorporating backhaul, particularly of elements such as waste, the industry has embraced the cost, carbon and efficiency savings such programmes provide. In the Footprint Snapshot Survey, over 50% of industry insiders viewed logistics-related efficiencies, such as consolidating deliveries, as an area of opportunity.

"We've run a programme of consolidating of our suppliers into distribution units, and then we've consolidated deliveries to our sites," explained one industry insider. "It's really helped the business financially because it's optimising deliveries and delivery times both ways."

With the potential to save emissions, administration, money, pollution and road vehicles, logistics related efficiencies present multiple opportunities.

Research description

Footprint Intelligence was commissioned by Nestlé Professional to create the 2019 Trends Report. The research for this project comprised of a mix of desk-based research, involvement in industry events and forums, and semi-structured interviews with foodservice experts, as well as comment and insights gathered from other opinion leaders linked to industry. In total, over 30 experts were interviewed. Footprint Intelligence is indebted to the industry experts who generously gave their time and insights as part of the research process. In addition, over 60 foodservice insiders also completed a 'snapshot' survey.

ABOUT FOOTPRINT INTELLIGENCE



With the ever-shifting sustainability debate, accurate intelligence, enabling businesses to make informed decisions, is vital. Footprint Intelligence is Footprint Media Group's research and analysis division helping companies to develop successful strategies in the context of responsible business practices.

Footprint Intelligence aims to drive, promote and share best practice by helping industry to answer some of the most pressing sustainability questions of our time by taking on the challenge of asking tough questions and finding answers. We use research and industry insight to bring industry together to find workable solutions, revealing opportunities, trends and challenges.

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