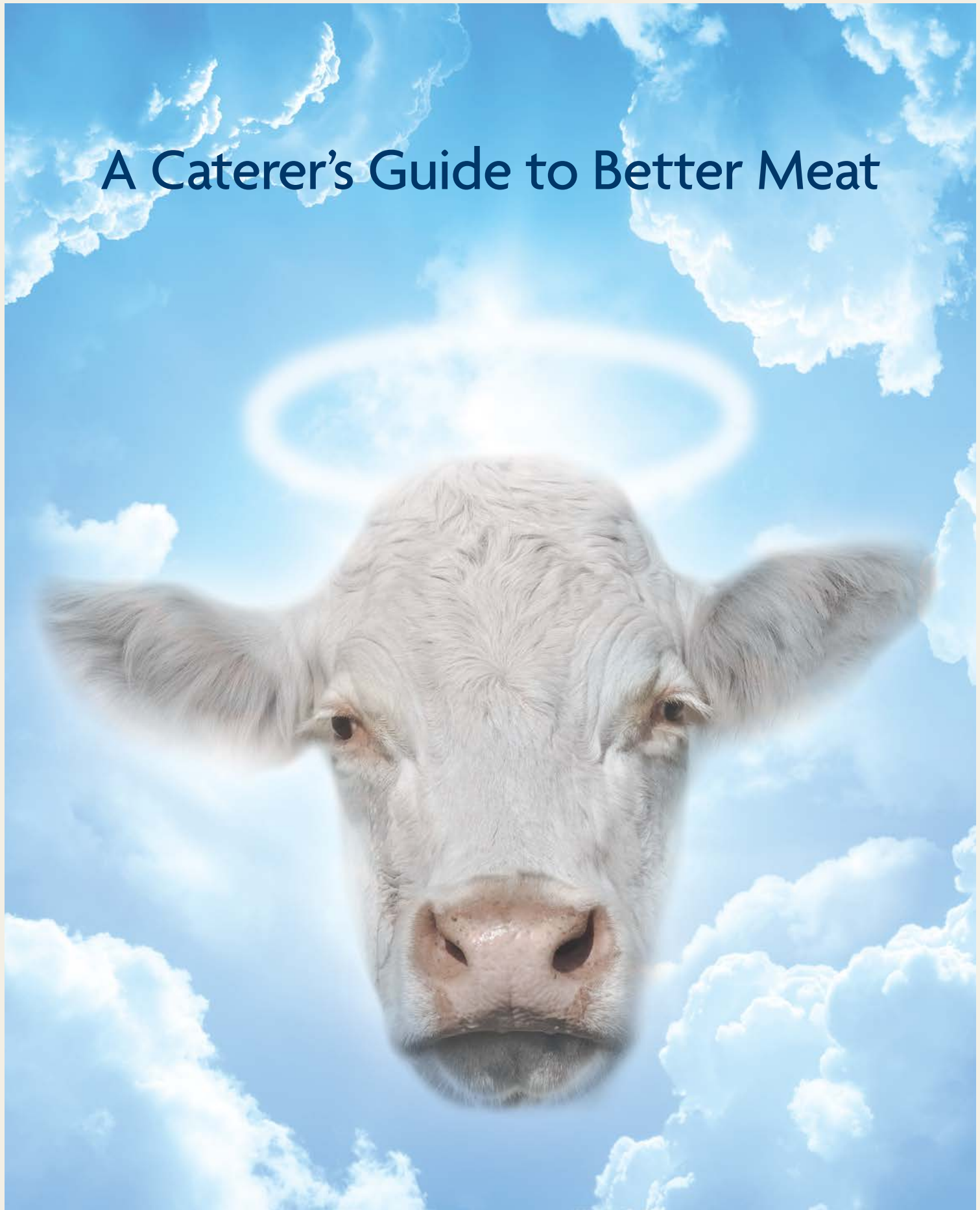


# A Caterer's Guide to Better Meat



**FOOTPRINT**  
INTELLIGENCE

# 1 The context for better meat

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**There has arguably never been a more important time for foodservice operators to commit to serving 'better' meat.**

**M**eat – and in particular that produced in intensive farming systems – is increasingly being linked with some of the world’s most urgent environmental and health crises including climate change, loss of biodiversity and antimicrobial resistance.

Better meat production, meanwhile, has even been linked to the avoidance of future pandemics. Last summer, a UN report<sup>(1)</sup> called for a transformation in food systems as one means of preventing the spread of zoonotic diseases like covid-19 that transmit between animals and humans. Among its recommendations was the adoption of animal welfare standards for the care, housing and transport of live animals along the entire global food supply chain.

In the UK, campaigners are warning that future free trade deals with countries like the United States and Australia risk allowing meat produced to lower welfare and environmental standards to enter the UK market, undercutting domestic producers and exporting our environmental footprint overseas.

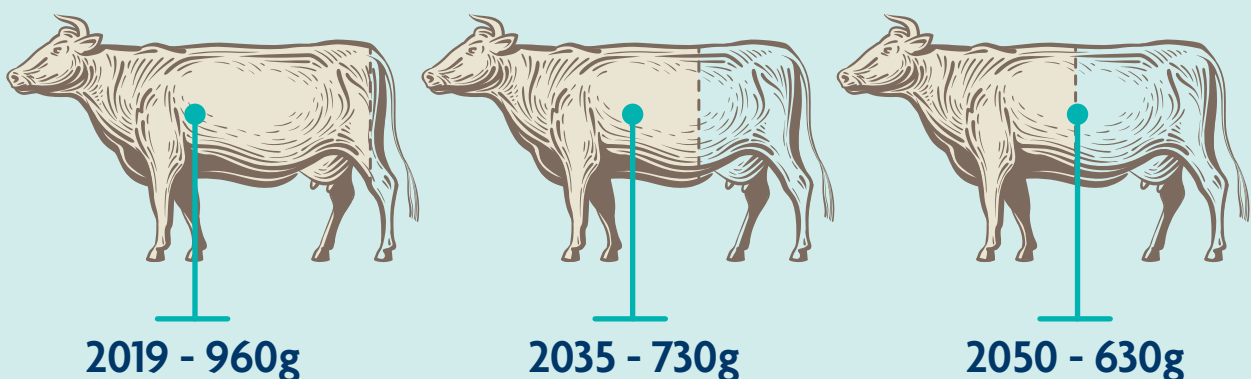
It is against this backdrop that businesses are coming under pressure from campaigners, and increasingly investors, to ensure the meat they do serve is of a higher quality, more sustainable environmentally and produced to high welfare standards. “It’s been a race to the bottom [...] you can’t go lower,” says Sustainable Food Trust chief executive Patrick Holden. “So now we’ve got to go up but we need to investigate what up looks like.”

In a sector where meat purchasing has historically been driven primarily by cost considerations this comes with significant challenges, as this report will explore. But for those foodservice businesses that overcome these hurdles there are opportunities to put themselves on a more sustainable long-term environmental and commercial footing.

### Climate conundrum

It is perhaps the link with climate change that is uppermost in the public’s mind when considering the environmental impacts of meat consumption. A paper in the journal *Nature Food*<sup>(2)</sup>, published in March this year, found that food systems are responsible for a third of global anthropogenic greenhouse gas emissions. Livestock consistently comes out as the greatest contributor of total food system emissions in lifecycle assessment<sup>(3)</sup>.

#### REQUIRED CHANGE IN WEEKLY PER PERSON MEAT CONSUMPTION IN ORDER FOR UK TO ACHIEVE NET-ZERO BY 2050



Source: Committee on Climate Change, 2021



Pound for pound it is ruminant livestock – specifically cattle and sheep – that are commonly identified as the greatest contributor of greenhouse gas emissions, more so than poultry and pigs. The evidence, however, is fiercely contested. SFT’s Holden, for example, says livestock reared in extensive, mixed farming systems can play “a very major role in addressing climate change” by taking carbon out of the atmosphere via sequestration.

Holden adds: “We need to operate within planetary boundaries and that will mean profound changes in the ratios of staple meats that form our future diets. It means we will move to staples being red meat [....and] a lot less chicken and pork.”

## **Dietary change**

Indeed, no discussion around better meat is complete without considering the case for eating less meat overall. Modelling suggests that at a UK population level current levels of meat consumption cannot be sustained by eating better meat alone. In its recent report for the sixth carbon budget<sup>(4)</sup>, the UK’s Committee on Climate Change concluded that meat and dairy consumption needs to fall by 20% by 2035 to put the UK on the path to net-zero with a further 15% reduction of meat products required by 2050. It has recommended the government run public information campaigns to explain to people the changes needed in their diets to help achieve net-zero.

In its Farming for Change report<sup>(5)</sup>, published in January this year, the Food, Farming and Countryside Commission (FFCC) commissioned IDDRI, a think tank, to model the feasibility of feeding the nation through a shift to agroecological farming methods. The model recognised the role of pasture-fed livestock and noted that cereal-based animal feeds for pigs and chickens compete directly with human consumption of those crops. As a consequence, the future diet modelled by IDDRI significantly reduces pork and chicken meat with beef seeing a relatively smaller reduction and sheep held constant as a result of their role in nutrient cycling and fertility building in mixed farming systems.

FFCC chief executive Sue Pritchard, herself a small-scale organic red meat producer, says: “In any future scenario that has more sustainable food and farming systems that are climate and nature friendly and healthier, less meat than we are currently eating but better quality meat is a given.”

## **Nuanced picture**

The impact of meat production is nuanced and can vary depending on the various indicators of sustainability. Beef and cattle may perform worse when looking purely through an emissions lens but when you factor in the impact of the end-to-end production process on biodiversity, for instance, challenges emerge around pork and chicken supply chains.

Indeed, businesses are grappling with a number of trade-offs as they piece together the puzzle of better meat (see chapter 3). Intensive systems can look great in a carbon footprint analysis, but less so in terms of animal welfare, for instance, or antibiotic use.

Excessive use of antibiotics, and consequent antimicrobial resistance, is another key risk factor linked to intensive meat production. The UK government-commissioned O’Neill review<sup>(6)</sup>, published in 2016, concluded that curbs on the use of drugs in agriculture were necessary to stop the spread of drug-resistant infections with a particular focus on restricting the use of antibiotics to prevent, rather than treat, disease in animals.



This is one among many issues causing concern surrounding the UK government's ambition to sign new free trade deals. Campaigners say the UK Agriculture Act does not protect UK standards, such as on animal welfare and environment, from damage by new trade deals and lower standard imports. Specific concerns surround the types and quantities of pesticides and antibiotics used and lower animal welfare rules.

In the 2020 Business Benchmark on Farm Animal Welfare (BBFAW) report<sup>(7)</sup>, which assesses business progress on improving farm-level welfare outcomes, foodservice companies trailed in third behind food manufacturers and retailers. A reliance in some areas of the industry on imported meat therefore puts foodservice firmly under the welfare spotlight.

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**“Mixed farming systems can play a very major role in addressing climate change.”**

*Patrick Holden, Sustainable Farming Trust*

**“In any future scenario less meat than we are currently eating but better quality meat is a given.”**

*Sue Pritchard, FFCC*

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## 2 The current state of the market

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**Caterers are making commitments to raise welfare standards for chickens in particular but transparency across the market is lacking**



Data on the meat procured by foodservice companies is limited. There are statistics on volumes, for instance, but very little if you want to dig beyond that, into provenance, certification, production methods or greenhouse gas emissions<sup>(8,9)</sup>.

In September 2020, Footprint scratched the surface on this topic with a survey of 25 companies, among them the largest fast food chains, contract caterers, pub and hotel groups<sup>(10)</sup>. This revealed that some were sourcing 100% of their meat from UK and Irish farmers, while others relied heavily on Europe and the rest of the world.

Across the firms that provided data, 90% of the beef comes from the UK and Ireland, compared to 70% of the chicken, 69% of the lamb and just 58% of the pork. Of course British meat is not de facto 'better' meat (see Is British best?) but dependence on far-flung suppliers raises questions over resilience, transparency and sustainability.

A lack of engagement is also a cause for concern. Only 11 of the 25 companies approached provided detailed breakdowns of their meat procurement. Campaigners commended those that had disclosed information but said the findings did little to assuage fears that meat of the highest standards is not regularly being procured. The results didn't offer much confidence in the direction of travel but how about today?

## Under pressure

Pressure to procure sustainable meat has, if anything, intensified in recent months, and a number of companies have made moves in relation to the proteins they provide. Nando's and KFC have both recently attracted praise for improvements to their chicken sourcing.

Nando's launched a new commitment to improve welfare whilst simultaneously lowering greenhouse gas emissions from production<sup>(11)</sup>. And KFC published a "chicken welfare progress report", which offered a surprisingly candid insight into what goes on in its supply chain<sup>(11)</sup>. Both have committed to the better chicken commitment, which requires among other things, a shift to slower growing breeds that have "better gait, fewer injuries and are less prone to disease, which translates into lower use of antibiotics", according to CIWF.

Currently, 2.65% of KFC's chickens are from such higher welfare breeds. "Once the right breeds have been identified the transition on the scale required will take more than 3 - 4 years to implement in each market," KFC noted.

McDonald's, meanwhile, produced a new map showing where its beef, pork and eggs come from<sup>(12)</sup>. The tool "gives our customers the chance to meet some of our farmers and find out just how local some of our quality ingredients are", the chain said. The chain uses 100% RSPCA Assured pork and eggs, for instance, and has a 'range enrichment programme' to ensure hens make use of the entire range. (Chicken, however, wasn't included in the map which showed only the ingredients the company sources from the UK and Ireland).

These moves show where foodservice companies are focusing their efforts in terms of better meat, principally provenance and higher welfare. As such 'farm assured' remains the go-to baseline standard for many companies.

Indeed, a significant majority of UK-sourced meat in Footprint's survey was certified by the Red Tractor scheme. Whether this should be seen as the absolute minimum is moot: as one caterer points out there is an awful lot of meat that doesn't even make that grade, in part due to the additional cost.



## Chicken and eggs

When it comes to higher welfare livestock products, it is the egg that has come first. Campaigners have been “really impressed” by moves among contract caterers to commit to cage-free egg production, though many commitments go further with free-range the target, they note. Market penetration of RSPCA Assured laying hens for example is currently 51%<sup>(13)</sup>. For pork it is 26%. The marginal price difference has certainly helped drive the market for these products. However, concerns remain over processed eggs. These make up 21% of the UK market and can come from regions where battery cages are still legal.

### Time to crack liquid egg challenge

The UK has some of the highest welfare standards for egg production in the world, and the UK customer's preference for higher welfare is highlighted by the high percentage of free-range eggs sold at retail, at 71%.

Many foodservice companies have made fantastic commitments to cage-free or free-range eggs, but these often only cover their shell eggs, not eggs used as an ingredient. Caged eggs are often used as a cheaper alternative in foodservice and production, as a result the overall production of non-caged eggs in the UK is only 58%.

Imported liquid and dried eggs are also frequently used as a cheaper alternative in foodservice and production, with the equivalent of 1.3 billion eggs imported annually in this format, many from countries whose welfare standards lag far behind those of the UK. Unlike shell eggs, liquid and dried eggs are not required to state their method of production on packaging. With the adoption of new trade agreements with countries such as Australia, where practices such as battery cages are still permitted, extending sourcing commitments to cover all eggs will become more important than ever in order to meet customer's expectations.





For chickens there is a bigger premium to pay, hence penetration of just over 1%. “Companies tend to lead with eggs and lead in the UK,” says Tracey Jones, global director of food business at CIWF. “It gets harder as you progress through the species.” However, signatories to the better chicken commitment – a range of measures to improve bird welfare – have snowballed in recent months, in particular among foodservice companies. This will help bring scale.

### SOME OF THE FOODSERVICE COMPANIES SIGNED UP TO THE EUROPEAN CHICKEN COMMITMENT



Market penetration for RSPCA Assured beef and lamb is under 0.1%. Cost isn't the only limiting factor. Consumers see lambs and cows in fields and “presume they're fine”, suggests Cliona Duffy, head of corporate partnerships at RSPCA Assured. This is not always the reality: “Outdoor access doesn't necessarily mean higher welfare,” she says. Soil Association head of policy Rob Percival adds: “There is good awareness of the very good side of British farming, but less awareness of the encroachment of factory farms.”

Identifying the field-free from the shed-shackled products is almost impossible, too. The Pasture-Fed Livestock Association has called for mandatory method of production labelling as the UK government reviews post-Brexit food labelling. According to Labelling Matters, a coalition including CIWF, the Soil Association and the RSPCA, eight out of 10 consumers want to know how farm animals were reared<sup>(15)</sup>.

## Time for transparency

The need for more transparency cropped up time and again in conversations for this report. “Anonymity rules,” as SFT’s Holden puts it, and this is particularly apparent in foodservice where there are fewer labelling requirements than in retail. An Eating Better report recently exposed some of the “hidden” costs of modern chicken production, from lameness in the birds to the supply of soya – a key ingredient in feed that has been linked with deforestation<sup>(16)</sup>.



Animals have been bred to grow fast and fed with soya. Caterers say that provenance of meat remains a priority but clients are now asking what the animals are fed on and where it comes from. Some are trialling alternatives to soya, which has been linked to deforestation (see Feed for thought). The additional challenge with chicken is that a soya-free bird can cost up to £30 but there will be little discernable difference in taste – especially when seasoning and spices are added.

Indeed, in many cases diners may not be eating the quality of meat they think they are. “There’s a perception from consumers, especially when it comes to eating out, that what they’re eating in terms of the meat and dairy is good quality,” says Joanna Trewern, behaviour change specialist at WWF-UK. “And that means there is no real consumer demand or pressure on the foodservice sector to improve the quality of their meat and dairy.”

This could be a dangerous game to play – not least given the rise in prominence of plant-based alternatives. SFT’s Holden sees a “massive opportunity” for caterers to respond to the ‘meat is bad’ narrative and what he sees as a growing interest in livestock products farmed in a “properly regenerative and compassionate way”. Ethical Butcher co-founder Glen Burrows agrees. “Up to 84% of people who try veganism are likely to fail,” he explains. “If I am returning to [meat and dairy] what do I return to and what is better?”

The plant-based push hasn’t necessarily translated into greater focus on less and better meat, though. Three challenges are evident: first is awareness of the term ‘better meat’; second is availability; and third is price. These will be discussed in the next two chapters.

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## Feed for thought

According to Greenpeace, an estimated 90% of soybeans produced globally are used as a protein source in animal feed for meat and dairy production<sup>(17)</sup>. Just under half of all animal feed made from soybeans and other oilseed crops is consumed by chicken and other poultry. Approximately 68% of UK soya imports come from countries in South America, where soya is driving deforestation, the campaign group has found. Some producers are trialling alternative feeds, most notably insects, but this remains at a relatively small scale. The Ethical Butcher has introduced soya-free chicken. A small bird (1.4-1.6kg) costs £17, a price many restaurants balk at, admits co-founder Glen Burrows. He does sense a shift though. “Because we’ve done it, other brands, other online butchers, other farmers are starting to pop up and go, ‘Hey, this soya-free chicken thing, I’m gonna do it’. That’s very, very exciting to me.”

## Is British better?

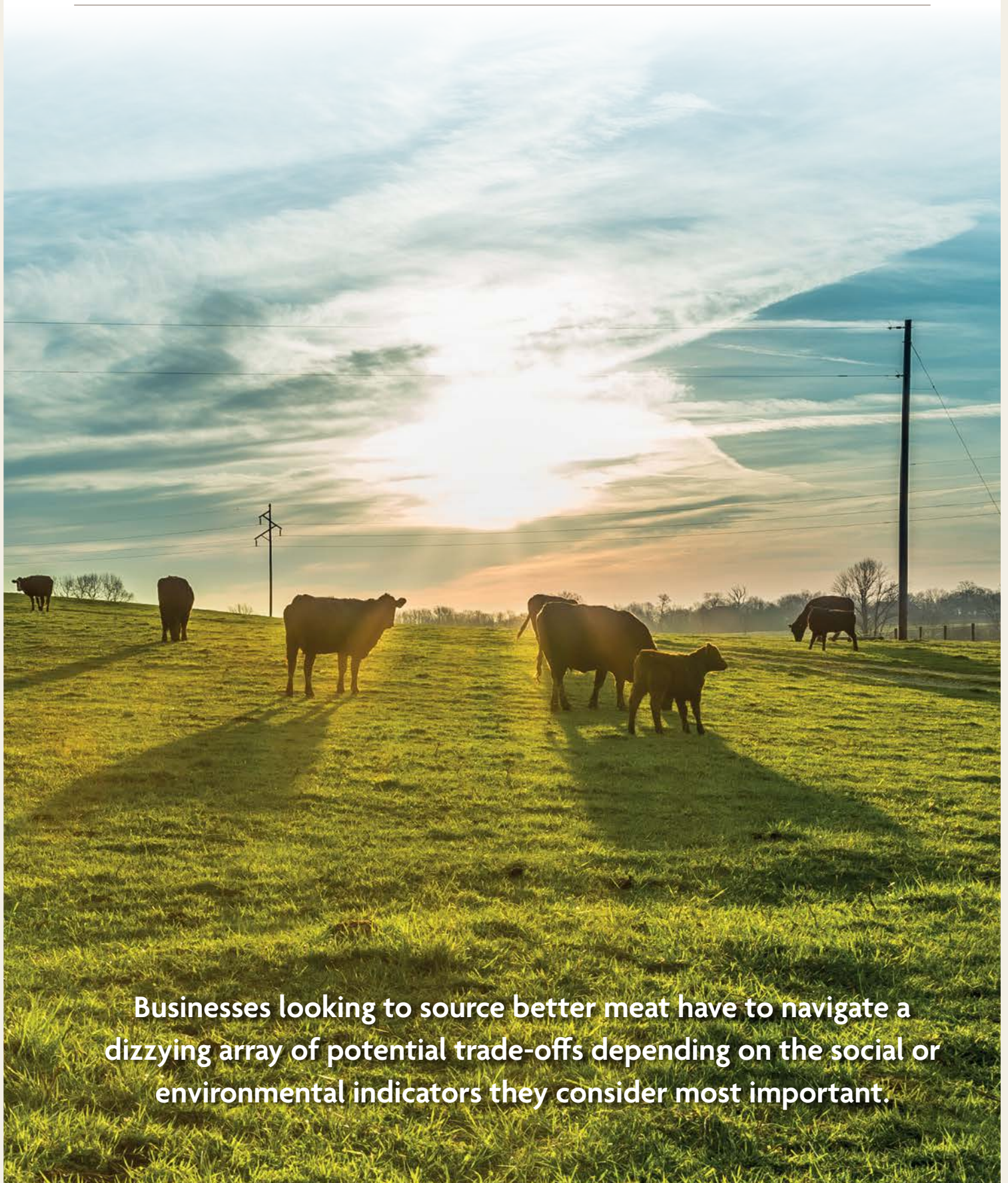
Provenance remains a priority when it comes to meat. Against the backdrop of trade deals, the climate crisis and vegan diets, the British meat industry has been working to position itself as the sustainable choice. There is a new website – [SustainableBritishMeat.org](http://SustainableBritishMeat.org) – which highlights that figures relating to livestock emissions are often global rather than national or local. At the turn of the year, the Agriculture and Horticulture Development Board (AHDB) also ran a six-week, £1.5m TV-led campaign in what it called a “graphic equaliser” in the debate around diets. The Ethical Butcher has also gained traction with its ‘Regenuary campaign’, which asks people to source as much of their food as possible from regenerative farming during the month of January.

But is British meat better? “On average the UK is a pretty carbon efficient country for producing meat,” noted professor Sir Charles Godfray during the launch of a new exhibition (Meat the future) at Oxford University Museum of Natural History. He even suggested the country could specialise in low carbon meat, given the reliance on relatively small, grass-fed systems. Farms would still need to transition to reduce emissions further and UK consumers would still need to eat less meat.



### 3 The better meat jigsaw puzzle

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**Businesses looking to source better meat have to navigate a dizzying array of potential trade-offs depending on the social or environmental indicators they consider most important.**



What does 'better meat' look like? It is a question that has for years caused arguments among academics, confounded campaigners and left businesses baffled.

"Our understanding of what constitutes 'better meat' is [...] inherently partial," noted experts from Stockholm Resilience Centre (SRC) in a paper for Nature Food in 2020<sup>(18)</sup>. This is because the "definitions are highly context specific and depend on a multitude of aspects that have to be jointly assessed. Scientific characterisation of 'less but better' is crucial," they added.

It's a fair point: how can companies, campaigners or politicians ask, nudge, or demand consumption of less but better meat when there is so much debate around what constitutes 'better'? Might the lack of definition actually result in less sustainable choices?

### Concentrate on climate

The simple answer would be to narrow the focus down to a limited number of environmental indicators, or just one: climate impact. Chicken and pork with their lower emissions per kilo of meat or gram of protein would look good against beef and lamb.

But then not all beef is bad. British farmers say their meat is 'better' than elsewhere given the reliance on grass-fed systems. Ruminants like cows can also use non-arable land and transform inedible biomass (that is, grass and other cellulose-rich plants) into high-value protein, acting as 'net protein contributors' to the food system<sup>(19)</sup>.



Extensive systems are not always de facto better though. An intensive system can produce protein with a lower carbon footprint – for example, grass-fed animals can burp more methane<sup>(20)</sup> – but uses more protein (from soya) in feed than is delivered in the meat.

Data that lumps together either countries or systems, or that focuses on limited indicators, can therefore be misleading. As Frank Mitloehner, an environmental expert and professor in the Department of Animal Science at the University of California, has put it: "What's better for the environment is such a loaded question because 'environment' doesn't just mean climate change."<sup>(21)</sup>

Tesco's analysis of emissions from its products found that eggs from caged birds had considerably lower footprints than those from organic systems<sup>(22)</sup>. Organic farming tends to have a higher footprint than conventional, but there are potentially wider benefits for biodiversity.

There are welfare considerations, too. Is high welfare more important than low carbon? And how do you balance the two? There is even debate around intensive systems – the “automatic assumption” they result in low welfare should be resisted, according to the University of Oxford’s professor Sir Charles Godfray. “We need much better data on all these issues and better ways to track what we eat back to how it is produced,” he said recently.

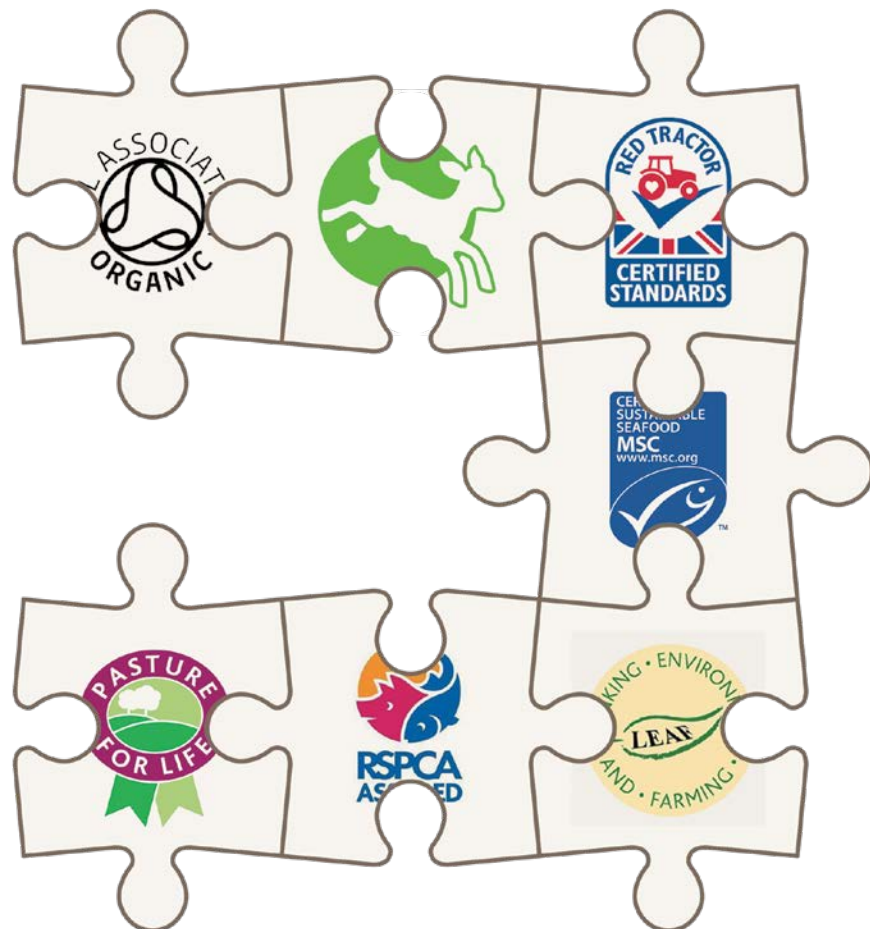
What should businesses do in the meantime?

## Certification approach

With all this confusion it is hardly surprising that foodservice companies have traditionally plumped for certification schemes as a proxy for better meat. The message is simple and the schemes (generally) are reliable. Caterers say, where certification marques (and higher production standards generally) are communicated to customers, they have the potential to deliver a commercial benefit. The challenge for consumers and businesses is navigating what the labels do and don’t deliver.

Percival at the Soil Association explains: “I think where certification has a very important role to play is when we’re thinking about the need to demonstrate impact and be confident in whatever investment you’re making as a business and be sure that the project you’re buying is adhering to the standards that you expect.”

These schemes also chime well with consumer demands, offering a quick communication tool. Research by Mintel in 2019 showed that animal welfare (45%) was the top priority for ethical food shopping, way ahead of a low carbon footprint (21%). Fair pay (33%) and support for local producers (41%) also ranked higher than carbon<sup>[23]</sup>.





Ecolabels exist for fair pay, animal welfare, and pesticides but these won't always align with a carbon footprint.

Still, schemes such as organic and Pasture for Life offer significant benefits over standard production across a number of issues, including animal welfare, soil health, biodiversity and antibiotic use.

However, production under suitable certifications covers only a very small fraction of the meat we consume. As SFT's Holden notes: "You've got to tick more than one box to get true sustainability." There is a general consensus that these boxes will encompass environmental impacts and animal welfare standards. It is also "extremely important" that better meat comes from systems that support rural communities and farmer livelihoods, says WWF's Trewern.

Together these constitute "extrinsic" factors, according to the SRC academics. However, it's worth noting that there are also 'intrinsic' factors in consumer perceptions of better meat, such as flavour, juiciness, eating quality and health. Here we focus on the extrinsic factors.

## Sourcing better

Eating Better has created an outline of what 'better' could look like. The Sourcing Better guide is designed to move foodservice and retail beyond the current baseline to "a system which favours the highest animal welfare and the lowest impact on the environment"<sup>(24)</sup>. There is acknowledgement that it isn't perfect but as Dan Crossley, executive director at the Food Ethics Council, told The Grocer: "We have to experiment [...] we have to get on with it today rather than in a few years' time."

The guide spans animal welfare, antibiotic use, greenhouse gas emissions, land use change, soil health, local pollution and water scarcity. For each indicator there are three levels: basic, better and best. So, for example, better in the context of animal welfare can be products aligned with RSPCA Assured certification for indoor production; while best would meet EU free-range or organic criteria. This helps tick the greenhouse gas emissions box, where best involves reduced stocking densities, as well as efforts to further reduce the carbon footprint of products.



“What we’ve tried to do here is build alignment on all the issues and impact areas,” says Simon Billing, executive director at Eating Better. Trewern at WWF-UK adds: “We’ve got certification schemes like organic and free-range and welfare standards so it’s not like this is completely starting from scratch. But taking that whole farm approach, looking much more closely at the supply chain rather than relying on existing certification schemes – I think that piece is new.”

The guide is only a few months old but it seems that companies are already assessing how they measure up.

Burger King claims its beef and chicken hit the ‘better’ category, for example, but assessing how it performs against the guide is a “work in progress”. Sourcing decisions are led by its customers. “We’re guided by our customers’ needs, which dictates the products we deliver,” a spokesman says.

## Procurement puzzle

Contract caterers also say their movement up the rungs will be guided by clients. Willingness to pay a premium and availability are key barriers to better meat (see chapter 4). Changes will not happen overnight but campaigners are encouraged by the shifts already witnessed in procurement of fish, for example, where sustainable seafood as certified by the likes of the Marine Stewardship Council has become a baseline for some businesses and consumers. Almost 100% of UK farmed salmon is also RSPCA Assured.

There is also recognition of the work going on behind the scenes. CIWF’s Jones says foodservice companies are not just focusing on one issue, like carbon, they are “working hard” across the three dimensions of people, planet and animals. Some are further ahead than others and “they’re really trying to solve the jigsaw puzzle of this”.

Unpicking the evidence around meat and its impact on the planet is fraught with difficulty but it’s a task that businesses, supported by farmers, governments, scientists and academics, must increasingly accept. Jones says companies recognise they need to be agile and adapt, not least given the huge reductions they need to deliver in greenhouse gas emissions.

## Navigating net-zero



In the race to net-zero companies will certainly need to shift through the gears on ‘less and better meat’. Corporate commitments have snowballed in recent months and the plans and reduction targets of those in the food sector will be scrutinised more than most. “It is hard to see what the end-game will be if your business model relies on burning oil, or belching cows,” said Duncan Oswald, principal consultant at environmental consultancy Eunomia, in an interview with Just-Food recently<sup>(25)</sup>.

Scope 3 emissions, the indirect ones from the supply chain, can represent 60% or more of a food business’s overall footprint, and a fair chunk of those will come from livestock products and agriculture. On-farm

emissions will need to fall dramatically. “We don’t want to avoid dairy, meat products and meat by-products,” said Nestlé CEO Mark Schneider recently. “We want to make them in a more carbon efficient way. If we... walk away from [those divisions] and the emissions continue unabated, the world is not better off.”

Suppliers will require security in order to invest in mitigation, says Mark Chapman, who is working on a net-zero roadmap for the hospitality sector. “A beef producer committing to decarbonise their systems by 50% needs a three year rather than three month contract,” he says.

Prices will not only need to reflect investment, new systems and new approaches – for example regenerative agriculture where, broadly speaking, farming systems contribute more to nature than they extract is gaining a lot of attention – but also lower volumes. It is, as the University of Oxford’s professor Susan Jebb suggests, “inconceivable we can achieve net zero without changing what people eat”. Some companies are already adjusting their portfolios, using meat- and dairy-free as a “mitigation strategy and opportunity” in terms of greenhouse gas emissions. As CIWF’s Jones says, increasingly businesses are understanding that “what they sell now isn’t what they’re going to sell in the future”.

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*Kajsa Resare Sahlin, Stockholm Resilience Centre*

**“... taking that whole farm approach, looking much more closely at the supply chain rather than relying [solely] on existing certification schemes – I think that piece is new.”**

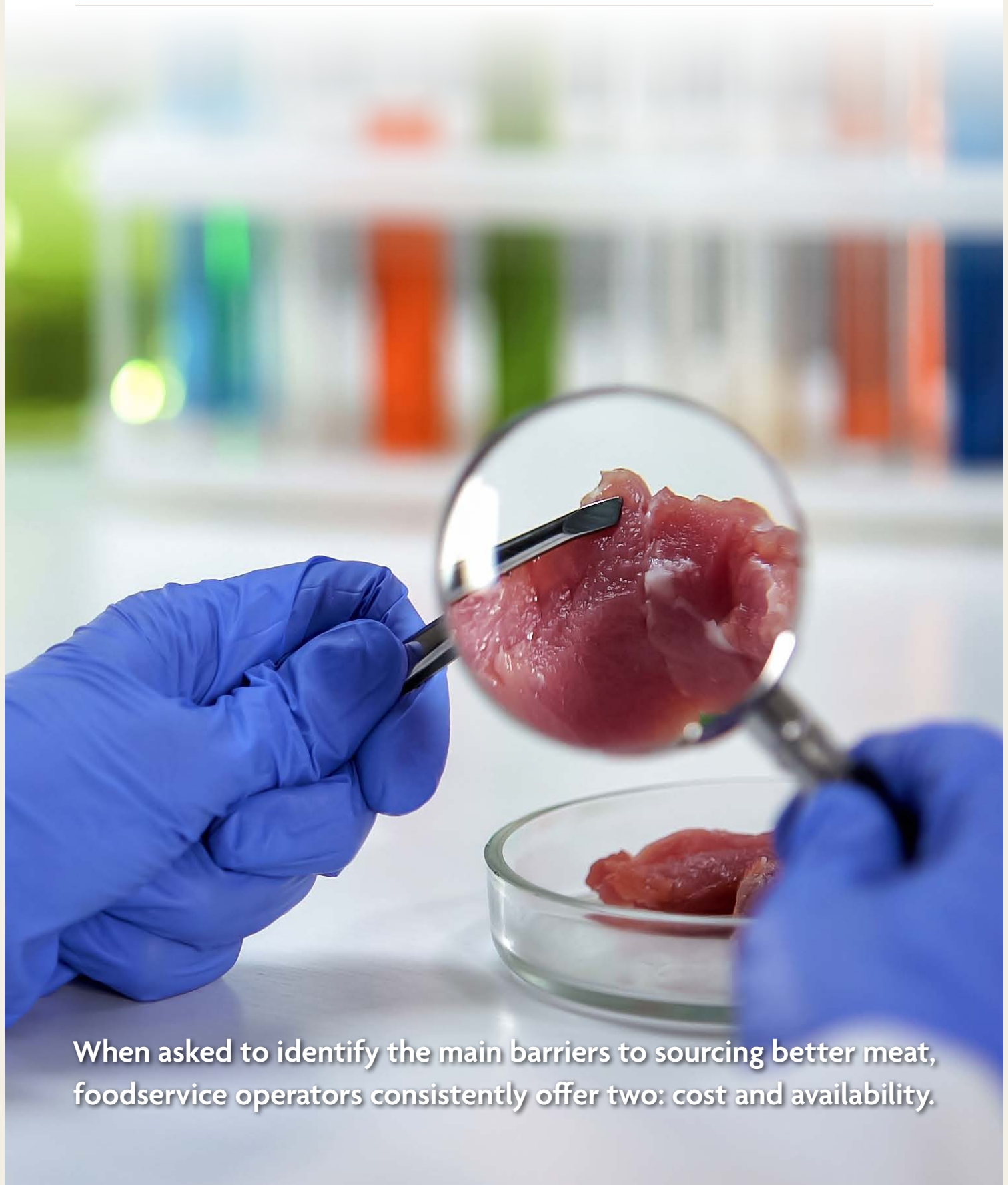
*Joanna Trewern, WWF-UK*

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## 4 Challenges in sourcing better meat

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When asked to identify the main barriers to sourcing better meat, foodservice operators consistently offer two: cost and availability.

**B**usinesses often want to do the right thing but market forces mean they are forced to look for the cheapest sources of supply. As Prestige Purchasing chairman David Read notes: “Nobody’s going to move first because somebody will move second and slowly and make a profit advantage.”

While certain private sector clients – blue chip companies in the corporate services sector for instance – may be willing to pay that premium in order to provide employees with the highest quality produce, budgets in the public sector are often prohibitive. On the high street, meanwhile, fierce competition for consumer spend between restaurant and pub brands often means that cost trumps all other considerations.

Caterers point out that the higher the specifications regarding the environment and animal welfare, the more expensive and less available the product is; therefore it takes considerable time and effort to guarantee a reliable supply for customer groups while maintaining commercial competitiveness.

### **Long supply chains**

The majority of caterers consider themselves to be too small to hold direct relationships with producers and therefore supply chains can be long and labyrinthine involving a combination of processors, importers, wholesalers and specialist catering butchers. Each of these plays an important role in providing a regular supply of consistent product to the required specifications, but the distance between producer and seller means individual foodservice operators have little influence over what happens at a farm level and therefore little opportunity to drive an improvement in standards on the ground.



Supply of the highest grade meat, including certified products, is often gobbled up by supermarkets who have for many years invested in establishing direct producer relationships, leaving foodservice operators to compete for the remaining marginal volume. Anecdotally, caterers say the supply of frozen, smoked or further processed meat produced to better than baseline standards is scarcer still.

Increasing the supply of better meat is an obvious solution but it too comes with challenges. Farmers require certainty in future demand which is not always offered by foodservice customers who buy through intermediaries such as wholesalers and catering butchers. “If you’re converting to organic that conversion takes two years or longer so there needs to be a clear intention and commitment to contracting for the long term,” says FFCC’s Pritchard.

This creates a ‘chicken and egg’ situation where foodservice operators want to be sure there is sufficient supply of a higher standard product before committing to changes in procurement, but producers won’t invest the time and money in converting without assurances there will be an end market for that product.

The wide geographic dispersion of foodservice sites across the country may on the face of it appear to present opportunities for local sites to source local produce by establishing direct relationships with small suppliers. But what tends to happen in practice is that, for reasons of efficiency, procurement is managed centrally meaning local sites have a choice of three or four mainstream suppliers from which they can buy with little flexibility built into the system. As a result, local producers can get locked out of supply chains that it would otherwise make sense for them to be able to access.

### **Kitchen specs**

Another challenge is that locally produced meat doesn’t always fit with kitchen specifications. As Burrows at the Ethical Butcher explains: “The supply is very limited. You can’t phone us up and say I want 60 kilos of fillet steak because it doesn’t exist. If you want to take half a cow, we can do that for you and your chef is going to then have to break it down and work out how to use the mince as well as the primal cuts.”



The length of supply chains also presents challenges around transparency. “People keep asking me for data across the foodservice sector and no one’s got it,” says Eating Better’s Billing. This makes it near impossible for foodservice operators to have visibility over what animals are being fed and how they are being reared – which in turn makes environmental reporting challenging and increases companies’ vulnerability to risks around deforestation or poor welfare, for instance.



The upshot is often a lack of consumer choice about better meat due to a lack of information. Even when meat is certified to a higher standard, it may not be advertised as such in certain foodservice settings where labelling loose or component products is more challenging, origin labelling is not a legal requirement and, for contract caterers, the client's appetite to promote sustainability at the point of sale may not always be high.

Institutional caterers face the added challenge of having an organisation situated between them and the end consumer, be it a healthcare trust, school or business. If the client doesn't want to pay for better quality meat, the service provider has little option but to source a cheaper product or risk the contract being commercially unviable.

## Less and better

Campaign groups have promoted the idea that by sourcing less meat overall customers can trade up to better quality meat. There are certainly signs that some caterers are looking to rebalance menus so they contain less animal protein and more vegetables and pulses.

But it remains a moot point whether the theory behind 'less and better' has as yet translated into the reality of a commercial setting. As one contract caterer which has increased the proportion of plants on its menu says: "We certainly haven't had any requests that because we're buying less we want a higher specification." Another caterer notes that the notion that serving less meat allows you to trade up to more ethically produced meat "has not yet come into the vocabulary of the private sector; certainly not with my customers".

There is nervousness too about speaking out on issues of meat sustainability and welfare for fear of a public backlash. "Even if businesses are talking about doing higher welfare, they may find that they receive responses on social channels about why they are serving meat at all and that can easily drive a reluctance to talk about it," says Duffy at RSPCA Assured. "But if businesses are not talking about it, there is less incentive to pay a premium for higher welfare meat in the first place. So, it's not always an easy issue to communicate" adds Duffy.

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**“Nobody’s going to move first because somebody will move second and slowly and make a profit advantage.”**

*David Read, Prestige Purchasing*

**“People keep asking me for data across the foodservice sector and no one’s got it.”**

*Simon Billing, Eating Better*

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## The public procurement paradox

The £2bn the government spends every year buying food and catering services presents a huge opportunity to grow demand for better meat. However, if anything, current buying standards are considered to be an impediment.

A report published in April by the House of Commons environment, food and rural affairs committee (EFRA) concluded that the government had largely failed to improve food production standards, animal welfare and sustainability through the standards it sets for public sector food<sup>(26)</sup>.

From poor monitoring to weak enforcement, and standards that often go no further than the UK legal baseline while leaving the door open to inferior overseas imports, the report details a litany of problems with current procurement rules that undermine any good intentions. Allied to this is a lack of origin labelling requirements for unpackaged meats with the result being “there’s a fear that foodservice can be an opportunity to bring in poor standard meat through the back door,” says Eating Better’s Billing.

The consensus among those interviewed for this report is that public procurement has the potential to drive a shift towards better meat but only if procurement rules are strengthened. As a starting point, this means mandating higher baseline production standards across the entire public sector, not just for central government as is currently the case.

Caterers believe, if properly enforced, this would remove some of the barriers to sourcing better meat in the sector. “If the market demand is there, then our supply chain over time will respond to that demand,” says one public sector caterer. “It won’t be immediate, there will be a blockage initially if there is too much demand and not enough supply, but slowly [and] surely the market will find that capacity to cope.”

Where meat specifically is concerned, Ruth Westcott from Sustain, the alliance for food and farming, suggests the government buying standards need to have a mandatory requirement for a maximum amount of meat that can be served across the week, and for that meat to come from better sources, with the proportion increased over time. This, she says, would send “the right messages through the supply chain”. It would also, adds WWF’s Trewern, signal to the public that this is a priority for the country.

News in June that foodservice businesses wanting to win large government catering contracts will need to commit to net-zero emissions and publish clear and credible carbon reduction plans or face exclusion from tenders could also force a rethink in menus and sourcing<sup>(27)</sup>.



## 5 Breaking down the barriers to better meat

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Perhaps the question is no longer 'can you afford to source better meat', it is 'can you afford not to?'



The barriers to buying better meat may be many and genuine but they are not insurmountable. Billing from Eating Better, which is calling for a 50% reduction in meat and dairy consumption in the UK by 2030, believes there are opportunities for foodservice operators to use menu cycles to deliver seasonal produce, principally plant-based, and to reposition meat as “more of a luxury treat and something to really enjoy and savour”.

Others believe that better meat has to be promoted for its superior taste and flavour in order to persuade the end consumer of its value, rather than simply appealing to their sense of morality. Great tasting meat, cooked well can give the business serving it a commercial advantage over competitors. “If you improve the quality of your service, including by serving better ingredients, you get more bums on seats, and you can edge closer to [achieving] economies of scale by selling more meals,” says the Soil Association’s Percival.

Where caterers are replacing meat with plant-based proteins, those alternatives have to be at least as attractive, if not more attractive in flavour or value, than the meat they are replacing. “It’s not our job to tell [the customer] what to do it’s our role to excite them,” says Prestige Purchasing’s Read.

### Provenance pays

Businesses can also stimulate customer demand for better meat by telling a compelling story about its provenance. Last year, more than a million people signed a petition calling on the government to protect British food standards in future trade deals, demonstrating a desire among the public to support farmers producing better meat (and businesses selling it).

“Customers are more concerned than ever about where their food comes from,” says Cathy Rouse, sales director at NCB Foodservice. “Food-related scare stories in the media have contributed to a change in consumer attitudes which has reinforced our demand for complete integrity in our supply chain and we make it a point of principle to ensure we do have that integrity and transparency from the farm right through to the kitchen door.”



High street restaurant chains such as McDonald's are already making provenance and sustainability central to their brand positioning and public messaging. Those caterers that are already paying more for better meat need to find ways of communicating the fact that both the animals and the environment are benefiting. For contract caterers operating across numerous client sites, this may mean developing bespoke communications with clients who themselves want to share the positive story with their customers about how their meat is produced.

Caterers that build a reputation based on sourcing better ingredients, including meat, can expect to unlock commercial benefits. "I think the biggest commercial advantage we get from the way we buy, particularly meat, is in business retention and winning new business," says Mike Hanson, director of sustainable business at WSH.

### **Trust in certification**

Perhaps the easiest way to tell the story of the meat on the plate is through certification. Schemes such as RSPCA Assured, Pasture for Life and organic provide robust proxies for sustainability in a way that is both recognisable and understandable to consumers. "Customers aren't always going to visit your website and read your CSR and sourcing policies but if you've got a logo on the menu it gives them instant confidence and reassurance," says Duffy from RSPCA Assured.

Businesses starting off with entry level certifications such as Red Tractor, for which accredited produce is more readily available, can then progress up the ladder to achieve higher standards as their ambition evolves and supply challenges are unlocked. Jones from CIWF talks of a "stepped approach"; foodservice businesses should note that while campaigners want the pace to quicken they are not expecting the shift to better meat to happen overnight.

### **Shortening the chain**

Closing the supply gap for better meat may in future require foodservice operators to establish closer relationships with producers and make end-to-end supply chain transparency part of their business proposition. As Read says: "Use your branding to reinforce your sourcing and your sourcing to reinforce your branding."

Commercially, it can be advantageous to go as high up the supply chain as possible so that margins are shared between fewer partners. And by establishing closer relationships with producers, businesses can exert greater influence over how their meat is produced.

John Appel, Sodexo's category buyer for meat, explains how the caterer is looking to work more closely with end producers. "Traditionally, we buy a lot of different lines so our basket has been probably a little bit too varied. I think one of the things covid-19 has allowed us to do is to look at the number of lines that we purchase and whether we can start to consolidate some of those specifications. And as we do, it means that we then have more volume on fewer lines, which means that we can then start to talk to people further up the chain."



As scale increases, the price of better meat will come down. This has already been the case with eggs where a wholesale shift to free range in recent years has seen the price differential with caged eggs narrow rapidly. Although higher welfare chicken currently commands a significant price premium, RSPCA Assured's Duffy notes that as more foodservice businesses and retailers sign up to the better chicken commitment the price will start to come down "because the demand for use of the whole bird will rise and it will be more cost effective for farmers to produce it".

### **Risk and resilience**

Incentives for moving towards better meat are not simply commercial as Eating Better's Billing explains: "For me better meat helps mitigate some of the business risks, whether that's deforestation in your supply chain or sourcing from areas of water scarcity. It's about long term resilient supply chains."

Indeed, with campaigner pressure mounting over meat's impact on the planet and investors increasingly scrutinising companies' exposure to future climate, environmental and social risks, perhaps the question is no longer 'can you afford to source better meat', it is 'can you afford not to?'.

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**“The biggest commercial advantage we get from the way we buy meat is in business retention and winning new business.”**

*Mike Hanson, WSH*

**“If you’ve got a logo on the menu it gives customers instant confidence.”**

*Cliona Duffy, RSPCA Assured*

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## Top tips for sourcing and selling better meat

- Educate people about what better meat looks like. Use farmer case studies as examples. Promote the fact that pasture raised beef, for example, is not only better for the environment it tastes better too.
- Tell your customers what you are doing. As one caterer puts it: “If you do it and you don’t tell anyone then from a commercial perspective you’re not driving the additional benefit.”
- Don’t attempt to switch all of your supply overnight. Start with lower-hanging fruit like free range eggs (shell and liquid) or pork to prove the customer demand is there for better quality produce, and then extend into other harder-to-source proteins over time.
- Look initially to work with your existing supply base to give them the opportunity to improve. This means not all businesses are competing for supply from a smaller number of producers that have already achieved higher standards or certifications.
- Smaller businesses who lack the buying power of a major retailer or foodservice operator should consider collaborating to form buying groups. By doing so they can generate sufficient volumes to convince producers to invest in higher standards.

## About Footprint Intelligence

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

Footprint Intelligence aims to drive, promote and share best practice by helping industry resolve pressing sustainability issues. It asks tough questions and finds answers. It uses research and industry insight to bring businesses together to identify solutions, opportunities, trends and challenges.

## About this research

Footprint Intelligence was commissioned by RSPCA Assured to create this guide for out of home operators in response to the new narrative emerging around ‘less and better’ meat which recognises that eating less meat is intrinsic to eating better meat without removing the option for people to eat meat altogether. The research for this project comprised a mix of in depth, semi-structured interviews with industry experts, desk-based research, involvement in industry events and forums, as well as comment and insights gathered from other opinion leaders linked to industry.

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