



Footprint Sustainability Index 2023

The foodservice guide to a more sustainable future



1 Strengthening strategy, culture and the supply chain

2 Delivering sustainable diets

3 Addressing food and packaging waste

4 Attracting and retaining clients and consumer

5 Saving energy and protecting natural resources

6 Encouraging creativity, boosting inclusivity and fostering wellbeing

Contents

Foreword	3
Executive summary: 2023 insights	3

1 Strengthening strategy, culture and the supply chain	6
---	---

2 Delivering sustainable diets	13
---------------------------------------	----

3 Addressing food and packaging waste	18
--	----

4 Attracting and retaining clients and consumers	25
---	----

5 Saving energy and protecting natural resources	29
---	----

6 Encouraging creativity, boosting inclusivity and fostering wellbeing	32
---	----

About this report	36
-------------------	----

References	38
------------	----

Foreword



Katya Simmons
Managing director,
Nestlé Professional UK&I

Last year was tougher than ever for foodservice and hospitality businesses. The Government's financial safety net was withdrawn, supply shortages continued to affect costs, and the cost-of-living crisis threatened to hinder progress. Despite this, the UK's drive towards Net Zero has galvanised our industry, and organisations across the value chain have doubled down, revealing win-wins in sustainable practices, like improved efficiency through reducing food waste and streamlining menus.

Recent extreme weather conditions show that climate change is a reality, not a far-off prediction. This report illustrates where organisations are focusing activity to address this. Recognising the urgent need to speed up scope 3 action and preserve biodiversity,

we reinforced our commitment through the Nescafé 2030 Plan last year. Aimed at reducing CO₂ emissions, improving farmer incomes and enhancing biodiversity, Nestlé is investing CHF 1 billion worldwide in the initiative over the next seven years. We're redoubling our efforts to combat climate change, halving our greenhouse gas emissions by 2030 to reach net zero by 2050, even as we continue to grow.

It's important we keep on finding creative solutions to drive meaningful long-term results. To do this, we urgently need young, dynamic talent to help identify innovative approaches to the challenges ahead. With staff shortages reaching record highs, this report shares industry insight on how to attract, retain and motivate staff. We're tackling the recruitment challenges head-on with organisations and business leaders through the 'Choose Hospitality Pledge'. This industry-wide alliance highlights the diverse career opportunities hospitality can offer to young people while celebrating the incredible talent our industry already has.

I urge you to read the following report. It's packed with inspiring solutions, up-to-the-minute research, and frameworks for introducing and evaluating change. It's testimony to what our industry is capable of during times of intense pressure. And it shows the exciting potential for greater growth, creativity and success in our shared journey towards net zero.

Executive summary: 2023 insights

Welcome to the Footprint Sustainability Index 2023.

This year, more than ever, it is striking how far the industry has progressed since our last report in 2022, driven by the passion and urgency of its people. And yet despite these gargantuan efforts, it is sobering that the hospitality and foodservice (HaFS) sector still has so far to go before it is firmly on target to achieve net zero, reverse biodiversity loss and transition to a more socially just world.

As ever, it has been a mammoth challenge to distil a year frantic with activity into the most valuable nuggets and advice that can be acted upon, and, as usual, we wish there were space and time to include everything. However, this report, which draws upon wisdom shared by senior leaders during in-depth interviews, consumer research conducted exclusively for this report by Vypr, and wider industry analysis, focuses on the salient need-to-know insights for 2023-24.

It is hospitality and foodservice's go-to-resource. It highlights the areas in need of urgent attention, and the commercial and environmental opportunities to be realised from environmental social governance (ESG) in action.

Executive summary: 2023 insights

Strengthening strategy, culture and the supply chain

“One of the biggest sustainability challenges for hospitality and foodservice is [reducing] scope 3 emissions.”

Katya Simmons, managing director, Nestlé Professional UK&I

FOOTPRINT VYPR INSIGHT



would choose a lasagne with a 50% lower carbon footprint over traditional lasagne¹

The need-to-know insights for 2023-24:

- The cost of living crisis is risking progress
- Accelerated action is happening on scope 3
- Industry is thirsty for detailed, quality data
- Carbon labelling is coming
- Biodiversity loss is recognised as being as big a threat as climate breakdown
- Leadership is being shown by efforts to transform climate finance
- Clearer expectations for suppliers are driving action
- Procurement changes are improving SME access to opportunities

Delivering sustainable diets

“Our priority is reducing the carbon footprint associated with our menus and minimising food waste across the globe.”

Philip Rowden, global food sustainability and wellbeing manager, ISS

FOOTPRINT VYPR INSIGHT



have tried to reduce the amount of meat they eat²
▼64% in 2022

The need-to-know insights for 2023-24:

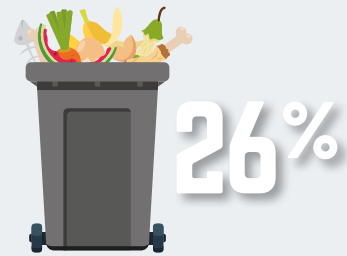
- Sustainable diets are key to reducing carbon
- Data provides evidence on urgency to reduce meat
- Food system change is needed to meet climate targets
- Health and sustainability need to be the defaults
- Familiar favourites and rebalancing hold power
- Plant-based under scrutiny over health
- Kids at risk from cost of living crisis
- Cultured meat continues to show promise
- Crustacean rights have been recognised

Addressing food and packaging waste

“Tackling food waste means understanding where you’re bleeding money. Identify what products you can reduce wastage on, and that saving goes straight to the bottom line, while supporting your net zero goals.”

Abbey Short, catering manager, Olympia London

FOOTPRINT VYPR INSIGHT



choose a place to eat because it is tackling food/plastic waste³
▼28% in 2022

The need-to-know insights for 2023-24:

FOOD WASTE

- 50% food waste reductions achievable and necessary
- Cost, carbon and time wins
- Mandatory reporting on its way
- Strategies must be public
- Technology drives action
- Alleviating food poverty motivates staff
- Set menus can save waste
- Supply chain needs support
- Customers want sustainable food

PACKAGING WASTE

- Packaging has made progress but it’s still a thorny issue
- Plates, containers and cups a priority
- Alternatives must be chosen carefully
- Reusables present significant opportunities

Executive summary: 2023 insights

Attracting and retaining clients and consumers

FOOTPRINT VYPR INSIGHT



specifically choose a place to eat because of its ethics/environmental practices in the past 12 months⁴
▼28% in 2022

The need-to-know insights for 2023-24:

- Increased need for genuine claims
- Greenhushing is dangerous
- HaFS has responsibility to support health
- Cost of living changing dining dynamics
- Technology transforming engagement
- Accessibility overlooked
- Low and no alcohol still booming

Saving energy and protecting natural resources

“People are looking to future-proof their businesses, and the return on investment for energy-efficient equipment is massive.”

Paul Anderson, managing director, Meiko UK Ltd

FOOTPRINT VYPR INSIGHT



would stop using a restaurant, pub, café or takeaway if they thought it was wasting energy⁵

The need-to-know insights for 2023-24:

- Investment in efficiency now cost-effective
- Connectivity enabling better management
- Automation relieving pressure
- Flexible equipment saving space and costs
- Still scope for logistics savings
- Majority taking action on water

Encouraging creativity, boosting inclusivity and fostering wellbeing

“Chefs are the new climate rock stars.”

Carolyn Ball, director for delivery of net zero, Compass Group UK&I

FOOTPRINT VYPR INSIGHT



say doing the right thing for people and the planet is a priority quality in an employer⁶
▼35% in 2022

The need-to-know insights for 2023-24:

- Staff shortages present challenges
- Rewards attract staff
- Culture, career progression and work-life balance motivate staff
- Reduced hours help work-life balance
- Focused approaches create recruitment opportunities
- Creative opportunities attract chefs
- Equality and diversity still important

1 Strengthening strategy, culture and the supply chain

“One of the biggest sustainability challenges for hospitality and foodservice is [reducing] scope 3 emissions.”

Katya Simmons, managing director, Nestlé Professional UK&I

FOOTPRINT VYPR INSIGHT



would choose a lasagne with a 50% lower carbon footprint over traditional lasagne⁷

The need-to-know insights for 2023-24:

- Cost of living crisis is risking progress
- Accelerated action is happening on scope 3
- The industry is thirsty for detailed, quality data
- Carbon labelling is coming
- Biodiversity loss is recognised as being as big a threat as climate breakdown
- Leadership is being shown by efforts to transform climate finance
- Clearer expectations for suppliers are driving action
- Procurement changes are improving SME access to opportunities

Cost of living crisis risking progress

“As we approach 2030, we’re running out of time.”

David Jackson, director of marketing and current affairs, Winnow

The cost of living crisis is the greatest short-term risk facing the planet, according to the World Economic Forum’s Global Risk Report 2023.⁸ And it threatens to undermine efforts to tackle climate change, which is the biggest long-term risk. “Much-needed attention and resources,” notes the report, “are being diverted from newly emerging or rapidly accelerating risks to natural ecosystems, human health, security, digital rights and economic stability that could become crises and catastrophes in the next decade.”

And cost of living certainly appears to be having an impact on HaFS. “Most hospitality and foodservice businesses will tell you that 2022 was infinitely harder than 2020 or 2021,” observes Juliane Caillouette Noble, managing director of the Sustainable Restaurant Association, “because, during Covid, government support helped keep businesses afloat.”

HaFS experts interviewed for this research note that cost pressures – including dramatically increased energy, food and staffing

costs – are pushing the industry to breaking point and causing sustainability initiatives to be shelved.

However, the cost and efficiency benefits of tackling food waste (see **Addressing food and plastics waste**) and saving energy (see **Investment in efficiency now cost-effective**) have shown that, yet again, sustainability can be a win-win for business.

Hope is also offered by an Intergovernmental Panel on Climate Change report that concludes genuine change can still fend off the worst of climate collapse.⁹ “We are in a critical decade for climate action,” Simon Stiell, the United Nations’ top climate official, told *The Guardian*. “Global emissions need to be reduced by nearly 43 per cent by 2030 for the world to achieve the Paris Agreement’s goal to limit global temperature rise to 2°C... It’s not too late. The IPCC clearly demonstrates that it is possible to limit global warming to 1.5°C with rapid and deep emissions reductions across all sectors of the global economy. [This report] has given us many feasible, effective and low-cost mitigation and adaptation options to scale up across sectors and countries.”

“If we had been faster off the mark, we would now be able to make meaningful progress in 2023,” observes Bob Gordon, director of the Zero Carbon Forum. “As it is, we’re still building foundations, and that’s very frustrating. We need meaningful action now.”

Accelerated action is happening on scope 3



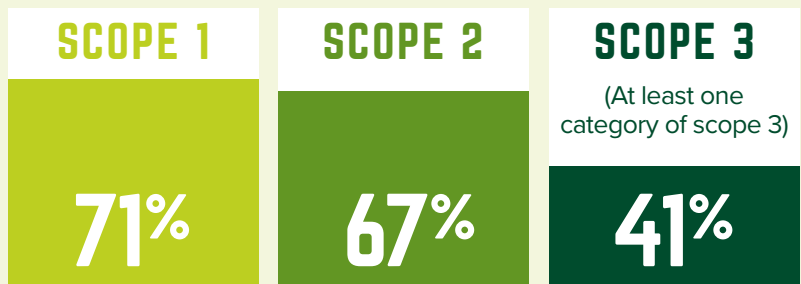
of the UK HaFS industry are signed up to the Zero Carbon Forum

Free protocols support major players and SMEs alike in their net zero journey. These include the Zero Carbon Forum’s net zero guide for the brewing and hospitality sector,¹⁰ WRAP’s scope 3 measurement and reporting protocol,¹¹ UKHospitality’s Environmental Sustainability Commitment¹² and affordable climate-focused tools such as Net Zero Now.¹³

This is contributing to a groundswell of change. A huge number of food and drink companies are now reporting their scope 1, 2 and 3, according to data from the CDP (see **CDP 2022 scope snapshot**).¹⁴ Fifty companies – with over 30,000 sites, representing 30 per cent of the UK HaFS industry – have signed up to the Zero Carbon Forum. And Net Zero Now’s sector-specific methodologies have attracted commitments from 2,500 sites, many of which are SMEs.¹⁵

Most industry insiders consulted

CDP 2022 scope snapshot: Percentage of food and drink companies who disclose scope 1, 2 and 3 emissions



Data from the 1,401 food, drink and agriculture companies that participate in the not-for-profit global environmental disclosure platform CDP.¹⁶

for this research noted the acceleration in work to quantify scope 3 in 2022. These advances mean that there is likely to be a distinct gap between publicly available information in early 2023 and that published by the end of the year, as efforts to quantify emissions and gain Science Based Targets approval come to fruition.

The indications are that, by the end of 2023, if you haven’t worked out your scope 3, you’ll be behind.

“There are more and more examples of people getting better data,” observes Bob Gordon, director of the Zero Carbon Forum, “and more closely aligning behind a single version of truth. This is because tools like WRAP’s scope 3 emissions protocol, the Global Farm Metric, the Cool Farm Tool and the Scope 3 Peer Group are creating standardised factors and frameworks.” Gordon notes that, despite cost-related delays, DairyUK is endeavouring to calculate the footprint of all UK dairy farms, so specific data is on its way.

But while reporting is improving, action on reducing scope 3 could be getting worse. “Across ten of the world’s largest food manufacturers, (reported) scope 3 emissions were up 7 per cent in the latest reporting year,” concluded David Burrows for Footprint. “Only two (Nestlé and Danone) managed to reduce their indirect emissions. Seven presented increases. The other (Tyson) hasn’t yet reported on scope 3 at all.”

Burrows examined data from a UK supermarket chain. It has a scope 3 baseline of 26.7MtCO₂e. A 50 per cent reduction – which would align with the 1.5°C target – would mean cutting 13.35MtCO₂e. Instead, in the past year, it has managed only to cut 0.2MtCO₂e in scopes 1 and 2.

Other areas also need better disclosure. Food and Drink Federation analysis of 11 major food retailers and 16 restaurant chains and caterers highlighted the need for work on deforestation. None of the companies displayed evidence of a deforestation-free supply chain.¹⁷

Harnessing expertise to drive action

“We wanted a way to measure ingredients across our operations globally so we can drive change across the whole organisation,” says Philip Rowden, global food sustainability and wellbeing manager, ISS. “It’s been a major exercise for our procurement teams, but it’s been hugely valuable. We categorised our proteins, vegetables and manufactured goods into key food groups. Then Coolfood, through World Resources Institute (WRI), completed the analysis, using 2019 as our baseline year.”

Coolfood Pledge members commit to a target of reducing greenhouse gas (GHG) emissions associated with the food they serve by 25 per cent by 2030, relative to a 2015 baseline. This aligns with the goals of the Paris Agreement.

“We chose Coolfood because its methodology includes a broader range of metrics, such as land opportunity cost and land use change,” says Rowden. “There are so many standards and so many ways of calculating. Partnering with WRI, via Coolfood, gives ISS a credible and proven way to reduce our greenhouse gas emissions. It isn’t just us saying, ‘This is what we’re doing.’ It also gives us global scale, so ISS can move together and have more impact across all the areas in which we operate. It’s powerful to be part of a global commitment that is serving 3.5 billion meals a year.”

Offsetting headaches

A popular approach to offsets is reducing everything you can, then offsetting issues that are currently too challenging, or those that are in progress, using a credible scheme. However, the validity of offsets has been called into question, highlighting the importance of doing your own due diligence. A *Guardian* investigation concluded that more than 90 per cent of rainforest carbon offsets by the biggest certifiers, are “worthless”.¹⁸ The offsetters involved dispute the researchers’ conclusions.

The industry is thirsty for detailed, quality data

“Expertise is building rapidly. Working with people across different disciplines to help gather and apply better data is very inspiring.”

Carolyn Ball, director for delivery of net zero, Compass Group UK&I

The need to quantify and track energy use, emissions, ingredients, nutrients and impacts on biodiversity means expertise is building rapidly. Companies are seeking protocols, tools and certifications that provide HaFS-appropriate solutions.

This is both exciting and challenging, as commercial opportunities make players scramble to get their products adopted. But with many based on different criteria, the result is confusion that hinders consumers and clients comparing like with like. And reducing complex issues such as ecological impact into comparable metrics can create a myopic focus on single issues, such as carbon, at the expense of other critical issues, such as biodiversity, water and social justice.

“Data is definitely the biggest challenge the sector faces,” says Bob Gordon, director at the Zero Carbon Forum. “But it’s getting better all the time, as we’re seeing with moves towards standardised approaches to issues such as carbon.” (See **Accelerated action is happening on scope 3.**)

Insiders think that 2023 will

see a continued evolution from educated guesses to evidence-based strategies. “Over the coming five years, we’re going to get much better at product-specific data,” says Gordon, “so footprints can be related to a company’s specific supply chain, rather than industry average emissions factors.” This will also make it possible to track impacts, such as the results of switching to more sustainable farming methods.

Carbon-footprinting analysis needs to align with key indicators such as biodiversity, water and nutrition. Detailed data will increasingly allow these different issues to be mapped, modelled and accounted for.

Carbon labelling is coming

Operators have begun to dabble with carbon labelling. ISS is trialling it in a wellbeing range, using Coolfood-calculated emissions factors. Compass has traffic lights for sandwiches in certain business and industry environments, and highlights low impact options at Wimbledon. Sodexo UK&I displays carbon values for certain dishes on its ordering app. And the National

Trust flags the relative impacts of meat versus vegetable options at certain sites.

Providing climate impact information is important to help consumers make informed choices, but the practicalities are complex. Ingredients data is usually based on standardised emission factors that aren’t necessarily sufficiently nuanced to compare dishes.

And how does labelling impact on recipe creativity – especially when maintaining flexibility in the ingredients and offers can be a powerful tool against food waste, because it allows surpluses to be used? Communicating information to consumers is also a challenge. Should it be represented as traffic lights? A number? Grams of carbon? Miles driven? Percentage of your daily carbon allowance? And where do you draw the boundaries for what is good or bad from a carbon perspective?

“Labels needs to be consistent,” says Philip Rowden, global food sustainability and wellbeing manager at ISS, “and converted into something the consumer can understand.”

Biodiversity loss is recognised as being as big a threat as climate breakdown

“Nature loss and climate change are intrinsically interlinked – a failure in one sphere will cascade into the other.”

World Economic Forum Global Risks report¹⁹



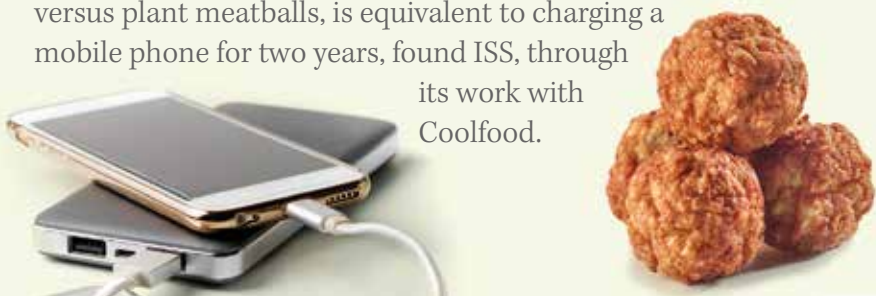
Agriculture and animal farming take up 35% of the earth’s terrestrial surface²⁰

Conflict and cost pressures up the ante, but the biggest threats to food security are biodiversity loss and climate breakdown. The former is already inhibiting food production in the UK and beyond – but, finally, steps are being taken to address it.

“Biodiversity loss and ecosystem collapse is viewed as one of the fastest deteriorating global risks over the next decade,” the World Economic Forum’s Global Risks report concludes.²¹ “A failure in one sphere will cascade into the other, and attaining net zero will require mitigatory measures for both

Mobiles and meatballs

The carbon difference between a four-meatball portion of beef, versus plant meatballs, is equivalent to charging a mobile phone for two years, found ISS, through its work with Coolfood.



levers... By restoring biodiversity in soils, for example, regenerative agriculture has the potential to store large amounts of carbon.”

Taking up 35 per cent of Earth’s terrestrial surface, agriculture and animal farming are the biggest direct drivers of global wildlife decline. High input, high output farming systems tend to have the biggest negative impacts on biodiversity. They also often generate less profit or are unable to break even.²² Balancing nature and food production enables farm businesses to support biodiversity and be financially secure.

Countries agreed to protect a third of the planet for nature by 2030 in a landmark deal at COP15, and businesses are in the hot seat to shift to nature-positive practices. The Taskforce for Nature-related Financial Disclosures (TNFD) framework is due for release in 2023.

Widespread changes to UK farming – to support the transition to sustainable practices – might finally be in progress, thanks to the advent of the Environmental Land Management (ELM) schemes. In this replacement for Common Agricultural Policy payments, the Government will pay farmers for work that enhances the environment. This includes planting trees and hedges, managing rivers to mitigate flooding, and creating and restoring wildlife habitats.

The RSPB’s Fair to Nature certification – aligned with ELM – is a valuable mechanism for

reversing biodiversity loss at scale across the UK. It stipulates that farmers ensure 10 per cent of their farmed land includes high quality habitats – the amount scientifically proven to reverse wildlife declines. And it is the only UK certification focused on protecting farmland biodiversity – the very element that underpins our ability to feed ourselves. There is, for once, a good case for yet another label.

Many food businesses have requirements that are likely to align with the scheme, potentially providing double incentives for farmers. Nestlé UK&I – which uses 1 per cent of the UK’s milk supply – won Footprint’s 2022 Sustainable Use of Natural Resources award for its work with British dairy farmers. Nestlé’s partnership with First Milk includes compulsory sustainability practices, such as optimising carbon storage within soil and using fertiliser that offsets carbon in the supply chain. The programme is pioneering field-by-field soil carbon analysis across 40 farms, to enable sequestration impacts to be quantified over time.

\$44 trillion – half of global GDP – is at risk from nature loss

World Economic Forum²³

Leadership is being shown by efforts to transform climate finance

Forward-thinking companies can collaborate to improve climate finance, inspired by work such as The Bridgetown Initiative.²⁶ Led by Barbadian prime minister Mia Mottley, this initiative sets out to address fundamental flaws in development finance. That includes changing the way funding is loaned and repaid, to prevent countries spiralling into debt. It also calls on rich countries to lend \$1 trillion in climate cash to developing ones.

“The food system is integral to climate impacts,” notes Carolyn Ball, director for delivery of net zero, Compass Group UK&I. “So I’m motivated by the role of companies like Compass to collaborate and co-invest. Because to help

Bee-friendly boozers

Forty-five nature-supporting initiatives were rolled out by Greene King across its pub gardens. These include living walls, bug hotels, site-sensitive planting, and working with councils to create bee corridors.



Supporting coffee farmers

Around 125 million people depend on coffee for their livelihoods, but an estimated 80 per cent of coffee-farming families live at or below the poverty line. Nestlé has therefore dedicated one billion Swiss francs, by 2030, to its Nescafé Plan.²⁴ This aims to achieve 100 per cent responsibly sourced coffee globally by 2025. It’s achieved 88 per cent so far in 2023, and all coffee used in products made in the UK is already 100 per cent responsibly sourced. The plan also sets a 50 per cent reduction in greenhouse gas emissions by 2030, and net zero by 2050.²⁵ It helps farmers transition to regenerative agriculture, and includes elements of financial support.

“At Nestlé, we’re focused on generating positive impact, now and in years to come,” explains Katya Simmons, managing director, Nestlé Professional UK&I. “This applies across the spectrum: from looking after soil, so it captures carbon, to improving livelihoods.”

Nescafé will provide training, technical assistance and high-yield coffee plantlets – of which 250 million have already been distributed – to help farmers transition to regenerative practices such as:

- planting cover crops, to protect and add biomass to the soil, and thus increase carbon sequestration
- incorporating organic fertilisers that contribute to soil fertility, which is essential for soil health
- increasing agroforestry and intercropping, which help preserve biodiversity
- pruning existing trees, or replacing them with disease and climate-change-resistant varieties, which will help rejuvenate plots and increase yields



drive transformational change of food system finance, and tackle inequality and social justice, the economics of our food system need rewiring. We can’t do that unless we truly join forces.”

Compass issued two sustainable bonds in 2022, raising a total €750m. The proceeds will be used in line with the company’s Sustainable Financing Framework. This encourages responsible sourcing, purchasing from local and diverse suppliers, and expenditure that supports decarbonisation within the group’s value chains.²⁷

Clearer expectations for suppliers are driving action

Frameworks such as the Taskforce on Climate-related Financial Disclosures – which is in its first year of mandatory reporting for most listed companies – are driving supply chain action and enhancing the consistency of data. There are also increasing requests for supply chain partners to report via platforms such as EcoVadis and Authenticate, through WRAP’s protocol surveys, or by answering businesses’ bespoke questionnaires.

“Despite the cost of living crisis, the demand for information and engagement on this issue at the corporate procurement level is just going up and up,” observes Julie Owst, head of sustainability, Bidfood.

“We need to collaborate because our suppliers don’t have the resources to focus on scope 3 so we’ve been working with them,” shares Isaac Pelham-Chipper,

procurement and supply chain ESG manager, The Restaurant Group. “WRAP’s GHG Protocol is the industry standard, so we’ve started getting an understanding of our key suppliers’ carbon maturity by using WRAP’s surveys. Then we can work out which platforms can help us tackle and track reductions as we go forward.”

However, the plethora of options risks duplication of effort and response fatigue. And insiders note that, despite frameworks that offer support, many suppliers struggle to set net zero and sustainability strategies and to quantify their impacts.

The answer is to provide clear expectations, set out detailed roadmaps for achieving them, and share expertise. “By helping our suppliers achieve net zero, we can maximise our company impact,” explains Claire Atkins Morris, director of corporate responsibility, Sodexo. “Our net zero engagement strategy sets out a roadmap that details our expectations for suppliers. We want to take them on the journey with us and we’re going to share our resources and expertise and support them.

“However, if they can’t show year on year improvement, we will have to make a decision about whether we want to continue working with them. This is a big deal, as we have worked with some suppliers for over 20 years. This is why we’re committed to helping suppliers make the changes necessary.”

Some suppliers report that it’s helpful for clients to push them for

data and action. When Hawksmoor hosted webinars for its supply chain, to talk them through the B-Corp meat restaurant’s net zero goals, attendees asked for specific actions and details. These enable those managing partner relationships to channel requests directly to farm management and improve traction.

Procurement changes are improving SME access to opportunities

In a move that will cause ripples across procurement, the NHS has published a dynamic purchasing scheme for fresh food.²⁸ It is hoped this will open doors for SMEs, by removing barriers such as the need

to complete financial evaluations at the point of entry. It should also help the NHS be more resilient, thanks to an increased supply base, and enable menus to reflect each region.

Others companies are supporting SMEs, and boosting the food industry’s talent pool, by transferring up to 25 per cent of their apprenticeship levy funds each year to other organisations. Compass Group UK&I has committed more than £1.6 million of those funds to support more than 100 SMEs, charities and social enterprises, so they can invest in and develop their staff.²⁹



2 Delivering sustainable diets

“Our priority is reducing the carbon footprint associated with our menus and minimising food waste across the globe.”

Philip Rowden, global food sustainability and wellbeing manager, ISS

FOOTPRINT VYPR INSIGHT



have tried to reduce the amount of meat they eat³⁰
▼64% in 2022

The need-to-know insights for 2023-24:

- Sustainable diets are key to reducing carbon
- Data provides evidence on urgency to reduce meat
- Food system change is needed to meet climate targets
- Health and sustainability need to be the default
- The power of familiar favourites and rebalancing
- Plant-based under scrutiny over health
- Kids at risk from cost of living crisis
- Cultured meat continues to show promise
- Crustacean rights have been recognised

Sustainable diets are key to reducing carbon

“Encouraging our customers to eat less meat is one of the biggest ways we can reduce our footprint. Veganism is massive for us.”

Isaac Pelham-Chipper, procurement and supply chain ESG manager, The Restaurant Group

If you’re not decarbonising your menus, you’re behind. Scope 3 emissions – dominated by ingredients – can be between 60 and 90 per cent of hospitality and brewing businesses’ overall emissions, according to the Zero Carbon Forum.

“People have good data and made progress on scope 1 and 2 emissions, but that isn’t where their impacts lie,” says Zero Carbon Forum director Bob Gordon. “Based on our members’ data, around 90 per cent of the sector’s emissions are in scope 3. Even an elimination of scope 1 and

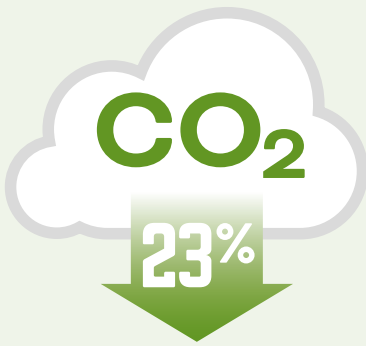
2 emissions would only get us so far. We simply must address scope 3 emissions, particularly the emissions associated with the production of food and drink.” He cites the example of an operator who cut their refrigerant gas emissions by 12 per cent: a valiant and important effort, but one that cut overall emissions by only 0.6 per cent.

Operators are therefore increasingly focusing on their menus. ISS, for example, has committed to achieving full scope 3 net zero by 2040, and signed the Coolfood Pledge. As Philip Rowden of ISS explains, “We’ve got a clear focus on reducing carbon emissions – through changing our menus – and reducing food waste. Changing our use of ingredients and promoting plant-based is key. Working with Coolfood has provided powerful insight to drive these types of changes.” (See **Harnessing expertise to drive action.**)

Tackling ingredients means shining a spotlight on the supply chain (See **Accelerated action on scope 3.**)

“We also need to ask fundamental, uncomfortable questions about the viability of certain business models,” suggests Juliane Caillouette Noble, managing director of the Sustainable Restaurant Association. “Are fine dining and gastronomy actually sustainable for humans? And what is a genuinely sustainable level of hospitality and catering?”

Menu changes cut carbon by a quarter

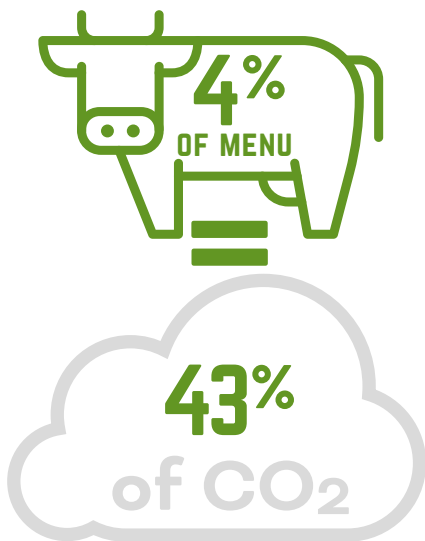


More than 500 food businesses in 12 countries were helped to reduce their food-related CO₂ emissions by 23 per cent in 2022 by carbon management software provider Klimato. The reduction was achieved by inspiring chefs and nudging restaurant guests.

Meeting customer needs

“Sustainability terminology is confusing,” observes Becky Haywood, head of ESG and sustainability, Greene King. “But climate change is quite clear to people. And they really want to do the right thing by the planet. But they still want to go out for a treat. So it’s our job to help them make those shifts to sustainable choices, and there is a lot we can do to bring down our carbon footprint – such as working with farmers in our supply chain or tackling food waste – that doesn’t affect the customer experience.”

Data provides evidence on urgency to reduce meat



As more operators get their scope 3 data in order, the business case for plant-based menus emerges. ISS found that globally, by weight, around 4 per cent of the food it purchases is ruminant meats, but this 4 per cent is responsible for 43 per cent of emissions. “This evidence-based data makes it easier to express the need for change to all stakeholders,” suggests Philip Rowden, global food sustainability and wellbeing manager, ISS. “It makes clear why we must alter what we eat. If we can shift that total from 4 per cent to 3.5 per cent or 3 per cent, it will have a huge impact on our emissions.”

This kind of data, says Carolyn Ball, director for delivery of net zero, Compass Group UK&I, “transforms conversations around re-engineering menus to reduce climate impacts, because you can evidence how specific ingredient swaps translate into measurable reductions and show the costs associated with those changes.

“We’ve been working with climate data specialists Foodsteps to analyse recipes, recognising the value of applying learnings to reformulate over 90,000 of them. We want to drill down into the numbers to map the commercial impact of each emission reduction achieved at menu and recipe level, at scale. If we can do that, we stand more chance of making systemic change.

“When chefs can see the measurable impact of swapping out or reducing an animal protein, or of switching to great ingredients that are in season, the opportunity they have to make a real, collective difference, every day, becomes so clear.”

It’s unclear whether animal products may be marketed as lower carbon if their emissions are significantly lower than average. The FDA is considering whether to allow beef to be marketed thus if it is produced with 10 per cent fewer than average emissions. And most operators are relying on data that is not sufficiently nuanced. But, in the meantime, reducing meat is an easy win.

Consumers also continue to care strongly about meat reduction. In our 2023 survey, 59 per cent said

they had tried to reduce the amount of meat they ate in the past 12 months. This was a small dip from the 64 per cent who had done so in 2022, but our insiders agreed that plant-focused options keep diners happy. “There’s a real expectation from consumers to have good quality vegetarian and vegan alternatives on the menu,” shares Becky Haywood, head of ESG and sustainability at Greene King.

Food system change is needed to meet climate targets

“We need transformational, radical change,” says Bob Gordon in Footprint’s *10 key insights on sustainable diets*.³¹ “We are hitting the biological limits of how much we can reduce carbon with our current food system. So we need to change that system.”

And while changes to menus are important, they won’t change diets fast enough on their own. We need the long-term shift proposed by Henry Dimbleby’s National Food Strategy. And that means transformational changes in food production. (See also **Biodiversity loss is recognised as being as big a threat as climate breakdown.**)

“We’re trying to make the lower carbon option the easy option.”

Philip Rowden, global food sustainability and wellbeing manager, ISS

“It is quite possible that meat will be cultured meat, milk will be produced through precision fermentation, and fruits and vegetables through vertical farming,” says Gordon. “And we will feed livestock on insects fed on food waste.”

Health and sustainability need to be the default

When Footprint published *Designed with health in mind*³² in 2017, only a handful of companies used psychology and nudges to promote healthier, more sustainable choices. But, in the intervening years, the industry has adopted its principles. “Covid drove a better understanding of the need – both personally and, for those in hospitality and food service, professionally – to create a healthier society and food system,” observes Katya Simmons, managing director, Nestlé Professional UK&I. From contract catering to the high street, plant-focused dishes are incorporated into regular menus rather than hived off to specialist sections, and such dishes regularly appear first on menus and counters to harness the primacy effect.

“Plant-based, vegetarian and vegan are now established and a normal part of the menu, even at leading high street operators where you wouldn’t have expected to see such offerings,” observes Julie Barker, independent consultant. “They have become part of the offering in a quiet way which has been accepted.”

Operators such as Compass and ISS are also tackling the tendency to describe plant-forward dishes matter-of-factly: “vegan burger”,

for example, is less enticing than “char-grilled chicken burger”. Chefs are being trained to apply the same imagination to describing plant-based dishes, and to move away from words like “vegan” and “vegetarian”, which can be a barrier.

The power of familiar favourites and rebalancing

FOOTPRINT VYPR INSIGHT



eat plant-based versions of familiar favourites, such as veggie burgers or nuggets, or veggie versions of classics like lasagne and cottage pie, when eating out³³

Plant-based versions of old favourites tend to be the most successful. These can be veggie or vegan reimaginations, or “plant-forward” versions that reduce the animal-based proteins. Sales of plant-based burgers are growing (boosted by McDonald’s and Burger King’s meat-free offerings), but so are sales of hybrid burgers that contain substantial plant-based protein. These are hitting the sweet spot of dramatically reducing carbon impacts and maintaining customer satisfaction.

“While eating out is often considered a treat, consumers will switch to plant-based options, providing the right choice is offered,” observes Hannah Baugh, nutrition manager, Nestlé UK&I, in Footprint’s *10 key insights on sustainable diets report*.³⁴ “It’s no longer enough to provide one vegan option and think the job is done. Meat-eaters expect (and are used to) being able to choose from their familiar favourites. So why should this not be the same for plant-based options too? There needs to be a balance struck between familiar favourites and more interesting alternatives.”

Across its schools business, ISS has “tweaked” hundreds of recipes to reduce the meat content and up the lentils, pulses and other plant-based ingredients. This allows ISS to:

- reduce CO₂ emissions by an average 420g per meal (equivalent to driving a petrol car for almost a mile)
- reduce total fat by 8 per cent and saturated fat by an average 12 per cent per portion
- increase fibre by an average 60 per cent per portion
- contribute to children’s five-a-day and provide essential vitamins and minerals

These reduced-meat recipes have enabled 15,450 more pupils per week to eat meals higher in fibre and lower in saturated fat, and reduce ISS’s carbon footprint by 77,660kg CO₂ per term.

The company is investigating how to expand the reformulated

menus, and the approach, across other sectors.

Plant-based under scrutiny over health

Plant-based ranges are being embraced by brands, but their sales are plateauing, in part because of consumer concerns about the healthiness of meat substitutes, how they are manufactured, and questions over sourcing. “The meat lobby is doing quite well at challenging the plant-based protein market, often using a narrative based around the unnaturalness of these products,” notes Bob Gordon, director of the Zero Carbon Forum.

“We used our expertise to ensure Garden Gourmet® had no red nutritional traffic lights across the front of the pack,” says Emma Keller, head of sustainability, Nestlé UK&I. “The range is also rich in protein and a source of fibre. But other brands have been less health-focused, and the wide range of meat analogue products – some of which qualify as high fat, sugar, salt products, like the fast-food-treat meat products they replace – does muddy the waters of the meat-replacement debate. That means procurement teams and consumers need to choose products with care.”

“I think we’ll see a second generation of plant-based products focused on being more transparent, ‘cleaner’ and closer to the actual plants that go into them,” predicts Juliane Caillouette Noble, managing director of the Sustainable Restaurant Association. “You can see this in the success of brands

like Symplicity Foods, which focus on plant-based alternatives that have great flavour, perhaps through fermentation, and using simple manufacturing processes.”

Kids at risk from cost of living crisis



School meal price hikes of at least 20 per cent since March 2020 are raising concerns that children will be denied access to a healthy diet,³⁵ especially as 12.5 per cent of caterers said shortages and other pressures were making them concerned about meeting food standards. This is worrying, given that 80 per cent of children eat less than the Government’s recommended intake of vegetables, and a third eat less than a portion per day.³⁶

Fareshare found that demand for redistributed food has doubled, with 73 per cent of the increase coming from people who have not previously asked for help.³⁷ Meanwhile, 800,000 children live in poverty yet don’t qualify for free school meals because the criteria are too restrictive.³⁸

Scotland has responded by expanding free school meals, and holiday food provision. London has

committed to providing free school meals for all children. Pressure must be kept up for the rest of the UK to think creatively for solutions and to follow these examples.

Cultured meat continues to show promise

Operators are watching the cultured meat space with interest as they look to reduce the carbon impacts of their menus and address welfare issues. R&D and investment in the space continues to soar, and meat grown in labs from harvested cells is closer to being served on plates.

Meanwhile, major players in HaFS are stepping up. Nestlé Research, in Lausanne, is working with startup Future Meat Technologies to explore cultured meat that does not compromise on taste or sustainability. Zero Carbon Forum members – including Burger King, Honest Burgers, Heart with Smart Group (franchise partners for Pizza Hut and Itsu) and Rare Restaurants (Gaucho and M) – headed to Ivy Farm Technologies to taste its cultured pork meatballs. Feedback was positive.

Singapore and the US have approved cultured meat farmers, but regulation in the UK has yet to catch up with science. Government thought is needed to work out how to include cultured meat in the food chain.

Prices are currently high but predicted to fall, just as those for other emerging tech, such as renewable energy, have done. “Some commentators expect the price to be lower than the price of

conventional meat before 2030,” says Bob Gordon, director of the Zero Carbon Forum, “in large part because it is so much more efficient, and therefore has fewer costly inputs. It’s expensive now because it’s about advancing the science. Once it’s at scale, price will not be a barrier.” Research by Oxford Economics³⁹, commissioned by Ivy Farm Technologies, indicates that cultured meat could contribute £2.1 billion to the UK economy by 2030.

Energy efficiencies also look promising. “We’re working towards getting one calorie output for around three calories in,” explains Tasvi Shah, head of strategic projects, Ivy Farm Technologies. “This is significantly more efficient than traditional agriculture – which is about 25:1 for beef, 15:1 for pork and 7:1 for chicken.” There also appears to be scope to tweak the nutritional composition of cultured meat

How does cultured meat stack up?

Cultured meat, produced using renewable energy, reduces land use by 95 per cent compared to conventional beef, 72 per cent compared to pork and 63 per cent compared to chicken. A life-cycle assessment by consultancy CE Delft⁴⁰ also found it less polluting: produced using renewable energy, cultured meat created up to 93 per cent less air pollution.

products, to improve the quality and quantity of components such as omegas, saturated fat ratios, iron content and more.

Cultured meat products can be prepared in the same way as their conventional meat counterparts, negating the need to train chefs in new preparation techniques. The industry is also working on overcoming the consumer ‘ick’ factor regarding meat grown in a lab.

Crustacean rights recognised

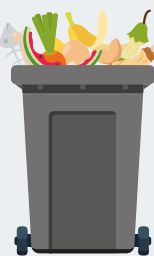
Decapod crustaceans – including crabs, lobsters and prawns – were recognised as sentient in UK law in 2022. Crustacean Compassion is calling for a radical overhaul of welfare standards, arguing that practices such as boiling fully



conscious creatures, and selling live animals packed in clingfilm – immobilised and slowly suffocating – are inhumane. The campaign group created a benchmark⁴¹ that found 70 per cent of companies recognise decapod welfare as a relevant issue, but only 50 per cent have formal management practices.

3 Addressing food and packaging waste

FOOTPRINT VYPR INSIGHT



26%

choose a place to eat because it is tackling food/plastic waste⁴²
▼28% in 2022

“Tackling food waste means understanding where you’re bleeding money. Identify what products you can reduce wastage on, and that saving goes straight to the bottom line, while supporting your net zero goals.”

Abbey Short, catering manager, Olympia London

The need-to-know insights for 2023-24:

FOOD WASTE

- 50% food waste reductions achievable and necessary
- Cost, carbon and time wins
- Mandatory reporting on its way
- Strategies must be public
- Technology drives action
- Alleviating food poverty motivates staff

- Set menus can save waste
- Supply chain needs support
- Customers want sustainable food

PACKAGING WASTE

- Packaging has made progress but it’s still a thorny issue
- Plates, containers and cups a priority
- Alternatives must be chosen carefully
- Reusables present significant opportunities

FOOD WASTE

50% food waste reductions achievable and necessary



reduction in food waste by IKEA⁴³

IKEA halved food waste across its global operations – 400 outlets in 32 markets – between 2017 and 2022. Supporting the Sustainable Development Goal 12.3 – halving global food waste by 2030 – seven years early, it showed the rest of HaFS that 50 per cent is

achievable.⁴⁴ The Swedish giant, famous for its meatballs, even overshot the target: it saved 54 per cent, compared to a 2017 baseline, by using food waste specialist Winnow’s AI technology. The savings translate into more than 20 million meals, \$37 million and 36,000 tonnes of CO₂e.

Cost, carbon and time wins

Rising food costs have prompted the industry to step up efforts to tackle waste. “At the most senior level,” observes Carolyn Ball, director for delivery of net zero, Compass Group UK&I, “bright, commercial brains have become very interested because we’re in a low margin industry, and sustained, unprecedented, double digit food inflation makes saving food even more attractive.”

In June 2022, UKHospitality reported that only one in three hospitality businesses was profitable.⁴⁵ And, despite a strong Christmas⁴⁶ and fourth quarter,⁴⁷ and a rise in revenues since 2019, cost pressures – including a record high of 24 per cent food price inflation⁴⁸ – and lingering Covid debt meant a third of hospitality businesses are at risk of failure in 2023,⁴⁹ according to UKHospitality.

“Our campaigns really focus on the link between cost savings, scope 3 reductions, net zero targets and food waste prevention,” says Eleanor Morris, sector specialist, WRAP. “It’s a win-win. You reduce food waste, and you achieve all of these.”

“People might think, ‘I don’t have time,’” says Abbey Short, catering

manager, Olympia London, and Guardians of Grub ambassador. “But once measuring food waste is part of your day to day, it’s as routine as completing your end-of-day due diligence sheets or your temperature-checking sheets. Plus, once you stop wasting food, you save the time taken to order, store and prep food that is binned – so you actually save time.”

Echoing the sentiments of many interviewed, Philip Rowden explains ISS’s perspective: “We’re focusing on food waste because it’s an important and high impact area, from a carbon and monetary point of view. And it’s the right thing to do because we can’t, as a society, continue to waste as much food as we do.”

32%

of food and drink business measuring food waste⁵⁰

Mandatory reporting on its way

Mandatory food waste reporting is ever closer. DEFRA’s consultation closed in late 2022, and analysis of the responses is underway.

According to WRAP, 32 per cent of large food and drink businesses measure and report food surplus and waste.⁵¹ And many seem on track to meet the 50 per cent by 2030 reduction target. For example, Compass’s mandatory programme has reduced its waste by 28 per cent over 2,650 sites in 28 countries, mainly thanks to the Waste Not 2.0

digital tracking system. Compass is also including food waste targets in KPIs, and tying them to remuneration.

In 2022, the NHS included waste in its mandatory food standards. ISS records waste by type (plate, prep and spoilage) in all of its global locations, typically using Winnow tracking technology. Philip Rowden, global food sustainability and wellbeing manager at ISS, says the programme was well received by investors demanding waste action and data, and saved more than \$2 million in 2022. Rowden supports WRAP’s Target, Measure, Act approach, and using resources like the Guardians of Grub campaign to inspire and upskill staff: “You’ve got to target. If you don’t target, you don’t measure. And if you don’t measure, you don’t act.”

Mike Hanson, director of sustainable business at WSH, and Guardians of Grub ambassador, agrees: “Everyone should be measuring and reporting. This has enabled our catering business to cut food waste by 42 per cent since 2014, saving our clients more than £2 million in disposal costs.”

Strategies must be public

Nearly a third of food and drink businesses, and 10 per cent of HaFS, are measuring and monitoring food waste, according to WRAP,⁵² but that hasn’t trickled down to public reporting. Like scope 3 data, increased action and better reporting are in the pipeline, but Plating Up Progress’s 2022 analysis of retailers, restaurant chains and

caterers found that only 15 per cent of UK food retailers, restaurant chains and caterers can show clear strategies for reducing waste in their supply chain.⁵³

Technology drives action

“We need to recognise where technology can do some more immediate heavy lifting,” comments Carolyn Ball, director for delivery of net zero, Compass Group UK&I. “If digital dashboards make it easy for operational teams to see where and why waste is happening, action can be taken to tackle it in a much more targeted way.”

Solutions such as Winnow’s AI are getting even cleverer at accurately identifying waste types, making the Winnow system quicker and simpler for staff to use. It has now been trained to recognise more than 600 different food items. And with reports issued before the next day’s service, staff can react to insights immediately.

Touchless systems that weigh and identify waste when it is thrown into bins are also in development.

Alleviating food poverty motivates staff

Corporate caterers, says Tessa Clarke, CEO of food redistribution app Olio, are particularly focused on food waste. Their staff – acutely aware of food poverty and the cost of living crisis – want to know that unsold but edible food isn’t being thrown away. “Sustainability managers,” Clarke observes, “seem to have a lot more power and a stronger voice.”

Set menus can save waste

Supply uncertainty, staff shortages and variable footfall have all contributed to many venues streamlining menus, “which has a side benefit in reducing waste,” says Chantelle Nicholson, chef owner, Apricity.

The Guardians of Grub ambassador suggests that streamlining menus to offer fewer options and less choice is a great way for restaurants to reduce preparation time, the time taken to train staff on complex menus, the amount of stock held, and food costs, thereby reducing waste.

Selling the steak sandwich

To tackle customer plate waste, Hawksmoor have rebranded the doggie bag, selling the idea of using leftovers to make a delicious steak sandwich, for which they share recipes. They’ve also switched to proactively asking customers if they want to take leftovers home, whether it’s for an easy meal or the stock pot.

Supply chain needs support

New data shows that “unprecedented pressure on supply chains has led to food buyers in the UK’s biggest organisations reporting a 60 per cent increase in food waste over the last six months”, according to research commissioned by

Tinder for food waste

Tesco has launched a dating app style platform to match suppliers with those that can use another’s waste for profit – beetroot peelings perfect for cattle feed was the first listing.⁵⁷

Sodexo UK&I.⁵⁴ “This surge casts doubt on the food industry’s ability to meet the UN’s Sustainable Development Goal to reduce food waste by 50 per cent by 2030, and hampers progress to net zero.”

WWF and Tesco research found that produce equivalent to 6.9 billion meals, and valued at £1.8 billion, goes to waste on UK farms each year.⁵⁵ And, as noted by the Institute of Environmental Management and Assessment (IEMA), “Farm waste is not currently within the scope of the

253 million meals worth of food redistributed

Redistribution of food has more than tripled since WRAP first reported figures in 2015. An estimated 426,000 tonnes of surplus food, worth more than £1.3 billion, has been saved from wastage. However, WRAP estimates that nearly 200,000 tonnes of perfectly good food still go to waste in the supply chain every year.⁵⁸

UK government’s proposals for mandatory reporting of food waste, which instead will focus on large food companies.”⁵⁶

Customers want sustainable food



73% of consumers want HaFS to act on sustainable diets⁵⁹

Seventy-three per cent of consumers want HaFS to act on sustainable diets. And the top area of concern is food waste (40 per cent), according to Nestlé research.⁶⁰ This is followed by local sourcing (39 per cent), minimal and/or recyclable packaging (33 per cent), reduced single-use plastic (31 per cent) and lower carbon footprint (31 per cent). Consumers also say that they’re happy to pay a premium for sustainable products.

Research by Capgemini,⁶¹ reported in Resource, found that awareness of personal food waste has rocketed: 72 per cent of consumers are aware of their food waste, compared to 33 per cent in 2020. Meanwhile, social media searches for extending the life of food have increased 80 per cent year on year.

This increased concern is attributed to cost (56 per cent), concerns about world hunger (52 per cent) and climate change (51 per cent). And, says the research, “Nearly

61 per cent of consumers want brands and retailers to do more to help them tackle food waste.”

Portion sizes is a good place to start. WRAP research found that 48 per cent of consumers waste food because of large portions.⁶² The research also found that three in five people are concerned about wasting food – and consequently wasting money – when they dine out.

PACKAGING WASTE

Packaging has made progress but it’s still a thorny issue

FOOTPRINT VYPR INSIGHT



22% choose a place to eat because it uses sustainable packaging⁶³
▼28% in 2022

8 billion tonnes of plastic had been produced by 2015, 6.3 billion of which have been discarded.

Only 9% has been recycled.⁶⁴
79% ends up in landfill or in the environment⁶⁵

150 million tonnes of plastic waste are floating in our oceans.⁶⁶

80% of consumers are critical of single-use plastics.⁶⁷

Packaging has not slipped down the priority list. “The climate crisis, cost crunch and supply chain chaos have heightened concerns and reaffirmed

the need to go further and faster,” concluded Footprint’s report *Reduce, reuse, recycle*.⁶⁸ “Businesses are being pressured by consumers, interrogated by investors and pushed by policy-makers.”

The single-use plastics ban has widespread support among consumers: 95 per cent of those who responded to the Government’s consultation supported it.⁶⁹ Footprint’s consumer research for *Reduce, reuse, recycle* found, “60 per cent are as concerned about packaging as they were this time last year... 30 per cent are more worried about it.”⁷⁰

Hospitality workers also care passionately about the issue. In our survey, 46 per cent said they choose a place to eat because it uses eco packaging or packaging that can be recycled, compared to 22 per cent in the general population, and 36 per cent of 18-24-year-olds.⁷¹

And the policy landscape is changing. The single-use plastics

Train staff

Ensure staff are waste-trained for the site at which they work. According to Juliane Caillouette Noble of the Sustainable Restaurant Association, restaurant chains have a tendency to train staff on the lowest level of recycling, rather than encouraging sites to find out what can and can’t be recycled in their area.

43% of litter is plastic bottles and non-alcoholic cans⁷²

2.7 billion pieces of single-use cutlery used in England every year⁷³

721 million single-use paper plates used in England every year; only 10% of which are recycled⁷⁴

£200 per tonne packaging tax charged on plastic manufactured in, or imported into, the UK, that does not contain at least 30% recycled plastic⁷⁵

£100m cost per annum to Foodservice Packaging Association (FPA) members of single-use plastics ban⁷⁶



ban comes into force in England in October 2023. Scotland’s deposit return scheme (DRS) has been delayed for the third time until March 2024, whilst the consultation for a DRS for England, Wales and Northern Ireland is finally underway, and extended producer responsibility (EPR) payments for managing household packaging waste are scheduled for 2024.⁷⁷ But uncertainty about DRS and

EPR's details – and differences in the implementation of these and the plastics ban in England, Scotland, Wales and Northern Ireland – are causing anxiety about implementation and logistics.

Alongside this, the lack of good quality, comparable life cycle analysis (LCA) is hampering decisions over which products are best to use in different circumstances, from single-use alternatives to reusable options.

“We are working hard with our customers to help them make informed decisions, so they can dispose of single-use packaging responsibly,” says Justin Turquet, head of sustainability, Bunzl Catering Supplies. “Understanding the whole product journey is also important. However, LCAs are intricate and can use different boundaries and metrics, which makes it hard to quickly compare and contrast products and materials.”

Plates, containers and cups a priority

This research concludes that disposable plates, containers and cups need prioritising ahead of bottles, which will be tackled by the Deposit Return Scheme. Action is urgent, considering research by WRAP showed that very little food-to-go packaging is being recycled.⁷⁸ Just 2.8 per cent of the 3.2 billion fibre-composite plastic-lined cups, 2-4 per cent of the 1 billion plastic cups, and “close to zero” of the 3.2 billion fibre-based food containers are currently recycled.

Alternative packaging must be chosen carefully

Packaging isn't really the problem – single-use is, and it's problematic as many organisations are just shifting from plastic to alternative materials that still may have considerable impacts. For example, it isn't easy or common for compostables and bioplastics to be sustainably managed within current waste management systems. This means that single-use plastic replacements could still be problematic.

Fibre-based (i.e. cardboard) containers can contain microplastics – usually in their waterproof coatings – but because those plastics account for a small percentage of the total weight, the containers are able to be marketed as plastic-free. Coatings often obstruct paper recycling, meaning that recyclers refuse paper shipments that contain food containers because they are unwilling to risk their yield. Alternatives, such as seaweed-based

packaging solutions from Notpla, get around such issues by using natural extracts from seaweed without chemical modification, which means – even if they end up littered in nature – they biodegrade in natural environments in four to six weeks. They can also be accepted into industrial composting, and the coating used on Notpla's cardboard food-to-go boxes makes them fully recyclable. Lastly, with no change in chemical structure, it isn't classified as a plastic by UK and EU legislations, and therefore isn't subject to plastic regulations and bans.

Notpla has a range of solutions available at scale – including waterproof, fibre-based food-to-go boxes (used by Just Eat Takeaway.com) and edible 'Ooho' pouches (suitable for energy drinks at sporting events) – and is working on developing more as part of its vision to develop sustainable solutions that are not plastics.

Plankton poo matters

Pierre Paslier, co-CEO of seaweed-based packaging innovator Notpla, highlights the danger that microplastics pose both in polluting the environment and in disrupting vital carbon sequestration – meaning plastic is also a climate change problem.

Waste plastic frequently ends up in the ocean, where it gradually breaks down into smaller and smaller microplastic particles. These are eaten by plankton, dangerously disrupting their ability to sequester up to 12 billion metric tons of carbon each year. Plankton eat nutrients, excreting the carbon as part of fecal pellets that are supposed to fall to the bottom of the ocean. As the plastics are light, the poo instead floats, preventing it from sinking and sequestering carbon. At a time when we're desperately trying to find ways to sequester more, our addiction to plastic is disrupting a free ecological system that locks up to one-third of humanity's carbon.

Plates, crockery and cups

There has finally been clarity with the Government’s single-use plastics plan. Plastic cutlery, plates, bowls and certain types of polystyrene trays and cups will be banned in England from October 2023.

However, the plan appears to have dinner-plate-sized loopholes. Confusingly, the ban will not apply to plates, trays and bowls that are used as packaging for shelf-ready pre-packaged food. Instead, these items will be included in the Government’s Extended Producer Responsibility scheme (EPR), which is designed to shift the cost of packaging waste from councils and taxpayers to producers. This was intended to incentivise producers to use packaging that can be recycled and meet higher recycling targets. However, this loophole might narrow slightly, with the Government also considering a ban on supplying single-use packaging to those dining in. It is also assessing whether to conduct a call for evidence on charges for disposable cups, including fibre-based ones used for hot drinks.

Bottles and cans

Scotland’s Deposit Return Scheme (DRS) has been postponed until 2024, while the DRS for England, Wales and Northern Ireland has finally been announced, but clarity is still clouded. The scheme applies to PET bottles and steel and aluminium cans in all regions, but includes glass bottles in Wales. It doesn’t cover bioplastics, compostables and rPET. Included items should have a mark to highlight they are part of the scheme. It is estimated that DRS will reduce the amount of bottle and cans littered by 85 per cent, by giving people a financial incentive to return them.⁷⁹ The UK’s current recycling rates are 70 per cent lower than in regions that have a DRS.⁸⁰

Since 2018, WRAP’s Plastic Pact members report:⁸¹



84% reduction in problematic and unnecessary single-use plastics

70% of plastic packaging is recyclable

50% of plastic packaging is recycled

22% average recycled content of plastic products

Reusables present significant opportunities

After a massive uptick in disposable use throughout Covid, reusables now coming back into focus, driven by policy pushes and consumer interest. Photos of reusable glasses, chip holders and Happy Meal boxes posted by a satisfied McDonald’s

customer went viral in France – with the images even commented on by French President Emmanuel Macron, “who heralded them as a sign of things to come,” according to Euronews.green.⁸²

“We’re seeing a move towards adopting circular economy principles relating to ownership,” observes

Justin Turquet, head of sustainability, Bunzl Catering Supplies, “and the retention of materials and the value of those materials. Legislative measures such as Extended Producer Responsibility are an attempt to place ownership at a single point of the supply chain. We are also seeing lower cost reusable options

coming through, and creative ways of implementing reuse schemes, trialling different containers, and different systems such as deposits, discounts and memberships. We are working towards a much better understanding of what works in which situations.”

“Since Covid,” observes Paul Anderson, managing director, Meiko UK, “people are more focused on making the planet better and saving money. Reusables just make perfect sense.”

Yet many foodservice operators flounder when it comes to deciding when reusables out-perform disposables. And many struggle to find LCA comparison data to help them make informed choices, driving a shift towards nonplastic disposables. For example, the NHS has announced it is getting rid of single-use plastics – though it seems to have replaced them with other single-use options, such as bioplastics, rPET and cardboard solutions,⁸³ which are also problematic from a waste perspective.

Insiders in the industry, such as Paul Anderson at Meiko, think that – in closed campus environments such as healthcare, defence, education, and business and industry environments where reusables can be easily collected – the environmental benefits, cost savings and improved customer experience of reusables will lead to them being widely adopted.

In contract catering, clients are also demanding reusables; as an example, Compass UK&I

already offers reusable takeaway containers.

Hefty deposits, such as those used in Europe, might be harnessed by hospitality and food service outlets to ensure returns. “If you’ve been to a German Christmas market, the gluhwien is €5 - €10 for the drink, and €5 for the glass,” observes Anderson. “So people bring them back.”

Reuse is also being increasingly introduced in the supply chain. For example, following customer feedback, Fresh Direct replaced large, lidded packaging with smaller, unlidded, recyclable buffet boxes. This small change will remove five tonnes of virgin cardboard from the supply chain each week.

Spotting an opportunity, warewasher manufacturers have entered the debate. Companies such as Meiko have adapted their products to ensure they can wash reusables to the same hygiene standards while prioritising energy, water and detergent-saving, to ensure the environmental benefits of reuse.

For example, Meiko’s M-iQ flight-type dishwasher has been designed to wash plastic, glass and porcelain to the same standard, despite plastic wetting and cooling differently. And the industry is responding: for example, hotel chains are expressing significant interest in using adapted ware-washing technology that enables them to easily and efficiently wash glass water bottles.

Reusable cups better, finds UN

The average single-use cup is used for 15 minutes. They are often chosen when the risk of breakages makes glass or porcelain unsuitable, such as at concerts and sporting fixtures, or in takeaway environments. A UN meta-analysis of cup LCAs concluded that when used repeatedly with responsible washing practices, powered by renewable energy, “reusable cups are the clear choice.”⁸⁴ Reusable cups made from sturdy, heat-resistant polypropylene can survive up to 400 washes and are 100 per cent recyclable.⁸⁵

The UN analysis also found: “Single-use cups have similar environmental impacts regardless of the material they are made of (whether bioplastic, fossil-based plastic or paper). When choosing between single-use options, the least environmentally problematic choice may be to use paper cups, especially if... low recycling rates can be turned around.”

4 Attracting and retaining clients and consumers

FOOTPRINT VYPR INSIGHT



specifically choose a place to eat because of its ethics/environmental practices in the past 12 months⁸⁶
 ▼26% in 2022

The need-to-know insights for 2023-24:

- Increased need for genuine claims
- Greenhushing is dangerous
- HaFS has responsibility to support health
- Cost of living changing dining dynamics
- Technology transforming engagement
- Accessibility overlooked
- Low and no alcohol still booming

Increased need for genuine claims

FOOTPRINT VYPR INSIGHT



would choose a venue whose signage displayed a commitment to reducing CO₂e⁸⁷
 ▼45% in 2022

High-profile cases of greenwashing, and distracting pressures such as the cost of living crisis and the Ukraine war, appear to be making consumers less responsive to carbon reduction claims. In our consumer poll for this report, 35 per cent choose venues that committed to net zero, compared to 45 per cent in 2022.⁸⁸ (Though the 2023 figure rose to 42 per cent for 18-24-year-olds, and 46 per cent for hospitality workers.) Asked about sustainability commitments more generally, 23 per cent of consumers (rising to 35 per cent for 25-34 year olds)⁸⁹ said they choose places to eat because of their ethics or environmental practices, compared to 26 per cent in 2022.

The reductions may be a result of increased scepticism and scrutiny of green claims.⁹⁰ The Government is reviewing whether bogus claims break consumer law,⁹¹ while the Competition and Markets Authority is scrutinising claims by UK brands and specifically targeting the food sector.⁹²

Our insiders agree that consumers are increasingly aware of the impact of the brands they purchase and consume. They expect proactivity and transparency and, when they don't find it, they move their money elsewhere.

"We're at 97 per cent retention for our clients," says Claire Atkins Morris, director of corporate responsibility, Sodexo. "And sustainability plays a big part in that, because it enables us to help our clients with their net zero goals." However, clients and consumers increasingly demand better data, and are keen to see

tangible evidence of sustainability in action, credible progress towards net zero targets and effective changes to the offerings, such as well-designed, plant-forward options.

Terms such as "sustainable" and "ecofriendly" should be quantified, to confirm that products and processes are genuinely environmentally friendly. The increasingly prevalent "regenerative agriculture" can also be problematic. As the Food and Land Use Coalition (FOLU) warns,⁹³ the lack of an agreed definition means there is a risk of greenwashing, because outcomes may be challenging to measure.

"Corporates," FOLU notes, "are increasingly setting practice-based targets... Such targets lack measurable outcomes at the farm, landscape and global level, which limits the understanding of what regenerative agriculture can achieve." This is why organisations such as Sodexo UK&I have partnered with the WWF to define and set targets for regenerative agriculture programmes.

"Investors care about net zero and sustainability because they want to know how resilient your business is going to be in the face of increasing climate change."

Julie Owst, head of sustainability, Bidfood

ESG benchmarks under scrutiny

The Financial Conduct Authority’s review of ESG benchmarks concluded that the overall quality of ESG-related disclosures made by benchmark administrators is poor. Lack of detail, lack of accessible methodologies and outdated data are highlighted as particular risks.⁹⁴

Greenhushing is dangerous

Setting sustainability and net zero targets, and tackling sustainability challenges, but failing to publish the details, is known as greenhushing.

Research by Southpole – covering 1,200 private companies, across 12 countries and 15 sectors – found that 67 per cent of companies had net zero and science-based targets, but nearly one in four had not published them.⁹⁵ “Not publicising progress makes corporate climate targets harder to scrutinise,” Southpole notes, “and limits knowledge-sharing on decarbonisation. That potentially leads to less ambitious targets being set, and missed opportunities for industries to collaborate.”

“It’s not going to help if everyone is so fearful of putting their heads above the parapet that no one does,” says Carolyn Ball, director for delivery of net zero, Compass Group UK&I. “We will get things wrong. But that’s how we’ll learn valuable lessons: by pursuing the things

that matter and being brave about it. That means communicating everything as far as you possibly can, calling out where there have been issues, and being open. We need to get everyone much more comfortable about reporting transparently on the information we have right now, so we can all make faster progress.”

Many HaFS businesses need help identifying ESG priorities and achievements. But choosing partners to help that identification, and then talking about action to tackle them, can be challenging, especially when insiders report they are bombarded daily with sales approaches.

The best tactic, advises Mike Berners Lee – a researcher, writer and consultant specialising in carbon footprints – in a Footprint podcast,⁹⁶ is to choose credible partners who can help you identify your business priorities and hotspots through careful data analysis. They will help you quantify, set targets and find solutions. You can then be detailed and transparent with data – including targets, progress and what is in and out of scope.

HaFS has responsibility to support health



Vegan and veggie orders triple⁹⁷

Vegan and veggie orders tripled in 2022, according to research published by Just Eat.⁹⁸ The category now accounts for a quarter of total orders on the food-to-go delivery platform. Meanwhile, Waitrose reported a 188 per cent surge in vegan Christmas food, and one fifth of 2,000 consumers polled by tree-planting platform Treedom said they planned to ditch meat entirely on Christmas Day.¹⁰⁰ Just Eat also found that searches for smoothies and soups were up by 83 per cent and salads by 49 per cent as customers hunt for what they perceive to be healthier foods.

However, with 25.9 per cent of adults¹⁰¹ in UK currently classed as obese, these encouraging signs are not enough. The World Health Organisation (WHO) warns that takeaways may contribute to Britain becoming the fattest nation in Europe within a decade, so the industry must take responsibility. Out-of-home food providers, note The Food Foundation, are “woefully behind” in setting health targets and providing healthier options, particularly for takeaways and deliveries.¹⁰²

Just Eat found that chips were still the most popular side of 2022, and pizza brands the most popular restaurant type on the platform. Eating out is responsible for around 20-25 per cent of adult energy intake, and people eat 200 calories per day more when eating out or eating takeaways, compared to food prepared at home.¹⁰² Takeaway meals also contain, on average, twice as many calories as retail or

manufacturer branded products.¹⁰⁴

Delivery apps, suggest the WHO, make it easy for people to access unhealthy foods in a couple of clicks, and incentivise over-ordering with free delivery thresholds. The organisation also notes that some video games embed delivery services to prevent players having to stop and make food, and delivery apps promote strong associations with streaming services.

Making eating veg fun

Veg Power and ITV's "eat them to beat them" campaign reached 1 million children in 2022 and prompted more than a billion extra children's portions of veg sales. This equated to an additional £34.1 million in sales, while 77 per cent of participating schools reported that pupils ate more vegetables.

Cost of living changing dining dynamics

Six in ten consumers believe restaurant prices are too high. But diners understand the reasons for the rises, and feel the soaring cost of food, staffing and energy justify the increases. A survey of 300 consumers by Revenue Management Solutions (RMS) found that 43 per cent are planning to spend less in outlets¹⁰⁵ – an almost identical result to a 44 per cent finding for the same question in a Nielsen survey.¹⁰⁶ According

to RMS, 40 per cent spend less by choosing cheaper restaurants, while 39 per cent order less or opt for cheaper items.

Meanwhile, WRAP research found 46 per cent are eating out less, and 32 per cent ordering fewer takeaways.¹⁰⁷ Compared to 2021, consumers are cooking more everyday meals at home. Nielsen research points to a heavy impact on deliveries and takeaways, with 37 per cent spending less in those sectors.¹⁰⁸

These are factors that those pricing plant-based options are taking on board: "We're focused on ensuring we don't make our plant-based solutions expensive, difficult or complex," says Philip Rowden, global food sustainability and wellbeing manager, ISS. "We make those solutions tasty, healthy and convenient."

As the cost of living crisis exacerbates food insecurity, HaFS is stepping in to help. Over 200 restaurants across the UK raised more than £466,000 via Action Against Hunger UK's Love Food Give Food campaign in October and November 2022, simply by adding £1 to customer bills.¹⁰⁹ Yo Sushi's 52 restaurants raised £241,740.¹¹⁰

Redistribution partnerships are also being forged. Sysco and food charity City Harvest will use surpluses to provide 200,000 meals to the vulnerable, saving 330 tonnes of carbon a year.¹¹¹

Technology transforming engagement

Consumers look to technology and

FOOTPRINT VYPR INSIGHT



of 18-24-year-olds use social media to find out if HaFS is acting responsibly¹¹²

social media for eco-information. In our poll, 47 per cent said they use social media to find out how restaurants, pubs, cafés and takeaways tackle issues such as the climate crisis, packaging and food waste. This rose to 71 per cent for 18-24-year-olds, and to 77 per cent for hospitality workers (indicating they too care what their employers are doing).¹¹³

Meanwhile, businesses are embracing digital opportunities. Ninety per cent of hospitality firms have adapted since the pandemic, according to research commissioned by Nespresso.¹¹⁴ Much of this is based on customer-focused digitalisation, such as contactless payments, online bookings and social media.

This is smart, given that consumers use social media to find restaurant recommendations (48 per cent), to book (22 per cent) and to find offers (36 per cent), according to research by Zonal.¹¹⁵ Twenty-two per cent of 18-24-year-olds check a venue's Instagram page before booking, 79 per cent use Google to find venues and 50 per cent use virtual assistants.

Consumers also look to social

media for information on what hospitality and foodservice are doing to tackle the climate crisis and act responsibly. And platforms such as TikTok and Instagram are rife with HaFS-related videos, such as viral videos by BM's Pete Redman on waste-busting bread puddings or using every part of a cauliflower.

Ordering apps – made popular during the pandemic – are being harnessed to highlight sustainability. Sodexo UK&I's app flags lower-carbon options and provides links to the sustainability stories or attributes of dishes and ingredients.

QR-code-based menus are used by Michelin Green Star restaurant Apricity, which says the system has helped it tackle waste. "We can put dishes and sides on the menu even if we only have a few portions," explains Chantelle Nicholson, chef owner and Guardians of Grub ambassador, "because, as soon as they've sold, we update the digital copy. So we use up the last two portions of a main, or a handful of veg as a side. That wasn't possible

when we relied solely on a daily, printed paper menu." Abbey Short, catering manager at Olympia London and another Guardians of Grub ambassador, has also noticed how pre-orders help kitchens to plan better, and hence reduce waste.

Sustainability-focused apps also drive engagement. Olio, which distributes donated food via volunteer networks, says 66 per cent of its users believe sharing food through the app has improved their mental health. Seventy-five per cent say sharing has improved their financial wellbeing.¹¹⁶

Accessibility overlooked

Nearly three in four guests (71 per cent) believe more needs to be done to address accessibility for disabled people in the hospitality industry, reveals a study by HGEM. Hotels are doing the best job, with 58 per cent feeling they support disabled people's needs. But only 7 per cent believe pubs have a good reputation for ensuring accessibility. To address one element, a free 10-minute

course teaches hospitality workers key sign language phrases: cpllearning.com/online-courses/british-sign-language-phrases-for-hospitality.

Low and no-alcohol still booming

Sales of no-alcohol and low-alcohol drinks are booming, and Britain leads the charge with sharp increases in new markets and growth, according to IWSR.¹¹⁸ Driven by the pursuit of healthy lifestyles and moderation, the low/no market has grown an average 9 per cent every year since 2018. Within this, no-alcohol volumes have risen 21 per cent, and are predicted to grow 10 per cent annually until 2026.

This is being felt on the ground: Ocado reported a significant rise in no and low-alcohol sales in the run-up to Christmas. Sales of low-alcohol Nozeco sparkling wine rose 83 per cent year on year and alcohol-free cider rose 24 per cent.

5 Saving energy and protecting natural resources

“People are looking to future-proof their businesses and the ROI for energy-efficient equipment is massive.”

Paul Anderson, managing director, Meiko UK Ltd

FOOTPRINT VYPR INSIGHT



would stop using a restaurant, pub, café or takeaway if they thought it was wasting energy⁵

The need-to-know insights for 2023-24:

- Investment in efficiency now cost-effective
- Connectivity enabling better management
- Automation relieving pressure
- Flexible equipment saving space and costs
- Still scope for logistics savings
- Majority taking action on water

Investment in efficiency now cost-effective

Spiking energy prices have had the silver lining of dramatically shortening the return on investment for energy-saving equipment

and interventions. It’s now a “commercially relevant agenda, necessary for future-proofing the business”, according to Ellie Besley-Gould, head of purpose, Hawksmoor. The Government’s 130 per cent super deduction – where any investments made in plant and machinery qualified for a 130 per cent capital allowance deduction until April 2023 – also helped.

“The cost of energy, coupled with the build quality and service backup, means operators are investing in efficient equipment,” observes Paul Anderson, Meiko UK Ltd.

“Soaring energy costs have led businesses to prioritise energy reduction.”

Juliane Cailloutte Noble, managing director, the Sustainable Restaurant Association

A persistent issue in HaFS is that operators set their sights on efficient equipment with strong sustainability credentials, only for budgets to be trimmed, and less green options chosen. Now, however, “Operators are more focused on the cost of carbon to their business, and are actively seeking the solutions that can help reduce their footprint, so they aren’t letting specs slip,” notes Keith Warren, former CEO of the Foodservice Equipment Association (FEA).

This culture change needs to

become engrained, to ensure that prioritising sustainability and efficiency in procurement is the new norm even when energy prices fall again.

The energy labelling landscape has also moved on dramatically, allowing procurement teams to more easily compare products from different manufacturers – something that was like comparing apples to pears previously because there was no standardised system. Commercial refrigeration is now included in A-G energy ratings. And the Energy Technology List – which identifies the top-performing 25 per cent of certain appliances – now accepts applications concerning commercial machines such as ovens and under-the-counter warewashers.

Clever energy-saving kit has also shortened returns on investment. Accelerated cooking methods, such as air frying, are making waves in the commercial as well as public domain. Energy optimisation software can also help by moving energy use around appliances, such as by turning off refrigeration briefly whilst a combi oven heats up – a timeframe long enough for the fridge temperature to hold. This reduces overall energy use and keeps usage within peak load limits.

Operators are also investing in flexible monitoring kit that can be moved from site to site, so that outlets can be assessed in stages. But however they are done, audits tend to identify areas for savings. For example, a Hawksmoor audit revealed a number of quick

wins, including changing kitchen extractor fans’ timings. Extending the time they are shut down overnight has dramatically reduced energy usage.

There is however evidence that hospitality businesses are still failing to capitalise on efficiency savings from sustainable practices. Research by Brita found that almost half (45 per cent) of hospitality businesses still leave equipment on overnight, despite 65 per cent not knowing how much energy the equipment uses.¹²¹

Connectivity enabling better management

Connectivity is enabling better energy management. Facilities managers can view real-time energy use across equipment, and hence pinpoint where staff might be turning on burners or kit unnecessarily. Connectivity also enables better planned preventative

maintenance, by highlighting when equipment has experienced heavy usage. In sites with restricted energy, consultants can accurately tailor the equipment to match.

The Big Table, which operates the Las Iguanas, Bella Italia, Amalfi, Banana Tree and Café Rouge restaurant brands, has joined Burger King, Côte and TGI Fridays in using carbon data specialists Zero Carbon Services to track energy use across their portfolio. Outliers can be identified, and behavioural change programmes implemented.

“Tech helps people to visualise numbers and bring them to life, which makes it incredibly powerful,” notes Eleanor Morris, sector specialist at WRAP. Digital tracking is also coming to waste management, as data reporting requirements shift operators towards better and more transparent systems.¹²²

Automation relieving pressure

The staffing crisis – with shortages of skills and manpower – is leading to an increase in automation and robotics. This is usually to replace manually repetitive jobs, such as flipping omelettes, while providing consistency. Automation is also improving time efficiency, removing potential health and safety hazards, and reducing time taken off in sick leave by automating elements that could lead to strain, such as warewasher hood-lifting; the ergonomics mean that pulling a washer hood down can be equivalent to lifting a 14kg dumbbell.

Food preparation is a particular area where automation can lead to savings. “One pub group installed food prep equipment to slice lemons, because the wastage on lemons was huge when people did it by hand,” shares Keith Warren, former CEO of the Foodservice Equipment Association.

Flexible equipment saving space and energy

“There is a big focus on trying to do more with less,” observes Paul Anderson, managing director, Meiko UK. Manufacturers are working hard to shrink the footprint of their equipment as operators look to claw back income by reducing the size of kitchens and increasing customer seats.

Flexible equipment that can be used for multiple purposes is also being preferred, enabling one piece of efficient kit to cook or wash in a

Simple but impactful savings

The Big Table has made big savings through energy initiatives. Cellar management kit monitors the temperature of drink storage cellars and adjusts cooling needs in response. Standard UK electricity supply tends to be higher than those of other regions, such as the USA or Europe. However, most equipment is made to run on lower voltage ranges. Plugging kit into a higher voltage supply wastes energy and shortens the life of the equipment. The Big Table has installed voltage optimisation equipment to address this issue, saving energy and carbon. “We have wanted to introduce interventions like these for years,” explains Simon Galkoff, the casual dining brand’s procurement and supply chain director, “but the energy crisis made it possible because the return on investment was so persuasive.”

targeted way in one compartment at a time. This saves space, capital investment and energy, and is a move away from the “always on” mentality.

“Operators are looking to maximise efficiency and space by demanding 20 per cent more output from 20 per cent less kitchen space,” observes Keith Warren, former CEO of the Foodservice Equipment Association. “Currently that is likely to include a 20 percent increase in efficiency too.” This includes options such as grills that can do multiple items (such as grilled sandwiches) at different temperatures/times and washers that can switch between bottles and plates.

Still scope for logistics savings

Sustained demand for, and investment in, low carbon transport are paying off with more availability of such technology in logistics. For example, some Nestlé food and drink products will now be delivered around the UK and Ireland by Nestlé-owned trucks that emit up to 95 per cent less carbon. The reduction is a result of the company switching 75 per cent of its owned fleet of trucks from diesel to Bio-LNG, a liquefied gas that is a by-product of waste. The move is another step towards Nestlé’s commitment to be net zero by 2050.

Majority taking action on water

Water is finally rising up the agenda, prompted by The Courtauld 2030 Water Roadmap. This marked

its first anniversary in late 2022, amid a year defined by record drought, wildfires and flooding, and high profile campaigns targeting agriculture and major food businesses hitting the headlines.¹²³ “There has been a penny drop moment,” explains Eleanor Morris, sector specialist, WRAP. “People are suddenly realising, ‘Why haven’t I been focused on this?’ and using the Water Roadmap to take action.” By the time an update was published in late 2022, all major UK retailers, one fifth of HaFS businesses and one third of suppliers had signed up to the Water Roadmap.¹²⁴

The Roadmap sets out key pathways for the UK food and drink industry to protect critical water resources for food supply, for nature and for local communities. It details how business can deliver the Courtauld Commitment 2030 target: for 50 per cent of the UK’s fresh food to be sourced from areas with sustainable water management.



Water work saves KFC tens of thousands per year

Water consultancy Ecoprod has helped HaFS clients save water and money through detailed analysis of businesses’ water footprints. This ranges from monitoring usage in hotspots – such as catering and washrooms – to renegotiating contracts, identifying leaks and installing water-saving interventions.

For example, KFC installed around 400 waterless urinal units in its washrooms, each saving up to 100,000 litres of water (and 17.5kg of carbon) per year. This saves an annual average of £300 per unit (more in the north of England, where water rates are higher); a yearly saving of £120,000.

Ecoprod also has a long-term partnership with McDonald’s, to operate efficient washrooms with waterless urinals, sensor taps and low energy dryers.

6 Encouraging creativity, boosting inclusivity and fostering wellbeing

“Chefs are the new climate rock stars.”

Carolyn Ball, director for delivery of net zero, Compass Group UK&I

FOOTPRINT VYPR INSIGHT



29%

say doing the right thing for people and the planet is a priority quality in an employer¹²⁵

▼35% in 2022

The need-to-know insights for 2023-24:

- Staff shortages present challenges
- Rewards attract staff
- Culture, career progression and work-life balance motivate staff
- Reduced hours help work-life balance
- Focused approaches create recruitment opportunities
- Creative opportunities attract chefs
- Equality and diversity still important

Staff shortages present challenges

People are at the heart of sustainability – but, according to our industry insiders, their wellbeing isn’t given enough focus. “Employee wellbeing is a huge part of any business,” suggests Chantelle Nicholson, chef owner at Apricity. “The lack of investment, and value, that hospitality businesses traditionally put into their people is a big contributor to the staffing crisis.”

Many people left hospitality and foodservice during Covid. This, combined with Brexit and other factors such as a poor perception of jobs in the hospitality industry, has led to vacancies being 64 per cent higher than pre-pandemic levels.¹²⁶ More than 40 per cent of hospitality businesses face skilled worker shortages.¹²⁷ “Understanding how to become an industry that actually treats people fairly is one of the most central questions in hospitality right now,” says Juliane Caillouette Noble, managing director, the Sustainable Restaurant Association. “Businesses need to work out what they need to change to be more attractive to people.”

The shortages are estimated to be costing the industry £21 billion in trade, and the Exchequer £5 billion in lost taxes, according to UKHospitality, the British Institute of Innkeeping and the British Beer and Pub Association.¹²⁸

An increase in office workers working remotely means fewer people are required to serve them. That – according to a study by

Nottingham and Birmingham universities¹²⁹ – puts 77,000 jobs in retail and hospitality at risk. Theoretically, 77,000 redundant workers could help plug the vacancies gap; but, with the jobs at risk rather than finished, that has yet to be tested.

Shortages have a poor impact on those who remain. Nearly half (45 per cent) of hospitality workers are finding their jobs less appealing, according to research by Harri and CGA.¹³⁰ Hospitality employees are working around six hours per week longer than pre-pandemic, according to workforce management company Bizimply. The shortages are also impacting on the time it takes to fill positions, according to 85 per cent of executives surveyed for *Hospitality Rising*.¹³¹ Eighty-eight per cent also agree that the vacancies are impacting customer service.¹³²

Our research indicates that salaries, culture (including sustainability), benefits, career progression and work-life balance are being used by HaFS to recruit and retain staff.

Rewards attract staff

FOOTPRINT VYPR INSIGHT

45%

of people say paying more than competitors is a key quality in an employer¹³³

▲37% in 2022

Salaries are rising exponentially, and although 63 per cent of people say supporting a good work life balance is a key quality, pay is still a key consideration according to our survey, with 45 per cent saying they prioritised businesses that pay more than competitors.¹³⁴ One fifth of hospitality employers have had to increase wages, by an average 7.7 per cent, according to research by Barclays that also notes the demand for staff with ESG skills.¹³⁵

Some have gone much further: at the time of writing, Pret UK & Ireland had given three pay rises in 12 months, giving shop staff a 19 per cent increase in the year to April 2023.¹³⁶ Other businesses, such as ISS, are looking to share UK best practice by pledging to increase implementation of living wages across their global operations.

Harnessing the power of ownership

Brewdog hopes its new employee ownership programme will encourage others to follow suit, and hence boost industry standards.¹³⁷ James Watt – chief executive of the Scottish brewer and retailer – has shared five per cent of Brewdog with the team. The shares come directly from Watt’s own shareholding, and Brewdog calculates that those each employee will receive over four years will be worth £120,000.

Culture, career progression and work-life balance motivate staff



Despite the pay rises (discussed left), hospitality workers rank salary as less important than culture, career progression and work-life balance, according to a 2022 MAPAL groups survey.¹⁴⁰ And our survey found that work/life balance was the most important factor for workers across the UK economy, jumping 4 percentage points from 2022. Focusing on staff training and development is therefore crucial.

Sustainability continues to engage and empower, and purpose is a powerful retainer, according to insiders consulted for this research. “We noticed increased interest from clients’ human resource teams, who want data on food waste savings and programmes, as they know it is something staff feel passionate about,” shares David Jackson, director of marketing and current affairs, Winnow.

“We often get new joiners feeding back that they were attracted to us

because of our values and our focus on sustainability,” shares Claire Atkins Morris, director of corporate responsibility at Sodexo. And that, in turn, makes businesses better prepared for the commercial and legislative impacts of environmental concern. “We’ve got 42,000 people,” notes Atkins Morris, “and we need them to be climate-aware so that they see their job through a slightly different lens. That’s how we’ll effect the most change, because sustainability is everyone’s role.”

Offering opportunities to connect with suppliers – to visit them and understand what happens out in the field – also helps to upscale knowledge, create life skills and experience, and engage and inspire staff.

Hawksmoor offered carbon literacy training to all of its staff.

The need for expertise, and its attractiveness to potential and existing employees, is illustrated by an ongoing focus on sustainability in competitions and training. WRAP’s Guardians of Grub food waste reduction training continues to garner strong industry uptake, while awards and competitions such as the Footprint Awards and Nestlé Professional’s Toque d’Or prioritise sustainability. And students are responding with gusto: Toque d’Or participants rated the competition’s 2022 theme –

“Balanced diets and sustainable farming” – 4.2 out of 5, and awarded the sustainable farming element 4.3 out of 5 for relevance.

Technology could be a game-changer too. Eighty-eight per cent of respondents in a Harri and CGA survey said technology is needed to improve workplaces.¹⁴¹ This could involve digital clocking-in and out, smart scheduling and shift management.

Supporting mental health

FOOTPRINT VYPR INSIGHT



of people in the UK say looking after mental health is a key quality for an employer¹⁴² = 45% in 2022

Concerns about mental health provision remain stable, according to our survey and insight, perhaps aided by both in-company and industry-wide Covid-era initiatives to help. To support hospitality teams’ mental health, industry initiatives include:

- the Burnt Chef Project, which offers managers an 18-24-month,

- funded apprenticeship that provides knowledge and tools¹⁴³
- the Craft Guild of Chefs partnership with the charity Kelly’s Cause to train those in the industry to spot warning signs of deteriorating mental health¹⁴⁴
- the #CheckPlease campaign that encourages employers and consumers to identify early signs of stress in hospitality staff
- Hospitality Action’s 24/7 Christmas 2022 helpline, which was funded by Bidfood and offered practical toolkits for hospitality workers dealing with strained mental health or financial pressures¹⁴⁵

Reduced hours help work-life balance

Cost pressures might be causing sites to change opening hours, but some operators are using this as an opportunity to improve working conditions. There has been the introduction of more flexible shift patterns and – often when it ties in with reduced footfall – a shortening of working hours. Some businesses are tailoring this to incorporate two days off – sometimes even consecutive days off; previously unheard of in the traditionally seven-days-a-week hospitality environment.

“Having a five-day week, versus a seven-day week, has been amazing for my mental health, and that of my team,” shares Chantelle Nicholson, chef owner at Apricity. “It means there’s a respite from the constant activity in my mind when the restaurant is open. It allows

focus on other things on those two days. And there’s an element of relief that it’s not at the forefront of my thoughts for that day, which wasn’t possible with a seven-day week.”

As many employers are working to implement changes without impacting on incomes – by holding salaries static and by ensuring workers receive the same overall number of shifts – the impression is that, overall, such changes are having a positive impact on employees’ work-life balance. Operators are also looking for ways to support the things that are important to their staff – for example, by giving staff members time off on their child’s first day of school.

Focused approaches create recruitment opportunities

Access to HaFS employment opportunities is being boosted by the staffing crisis. UKHospitality CEO Kate Nicholls extols the benefits – for both workers and employers – of the over-50s demographic,¹⁴⁶ while Nemi Teas offers refugees the opportunity to enter the UK job market. The latter’s plan to employ 252 refugees at 14 sites over the next five years will, the company estimates, positively impact more than 1,000 refugee lives when the dependants of workers are taken into account.¹⁴⁷

Young people are also vital, both to close existing staffing gaps and to strengthen the talent pipeline of the future. Of the 10,000 people that the Springboard charity has helped enter the industry, 85 per

cent are under 30.¹⁴⁸ Yet research by Nestlé Professional and CareerScope found that a lack of information on the choice of jobs on offer, a limited understanding of the opportunities for career advancement, a perception of hospitality roles as unskilled, and a distinct lack of mentors are the key barriers preventing young people from pursuing careers in hospitality.¹⁴⁹ This could lead to 13-14 million roles that would suit hospitality graduates going unfilled in the next five years.¹⁵⁰

In response, the industry is being creative in communicating the varied roles, responsibilities and rewards of a career in hospitality to young people. “We founded the Choose Hospitality Pledge, in partnership with Springboard’s CareerScope and Choose Hospitality, to share our industry’s great career opportunities with young people across the country,” says Katya Simmons, managing director of Nestlé Professional UK&I. The pledge encourages passionate professionals to become ambassadors, to showcase the industry’s opportunities and benefits at career talks in local schools.

“The ability to grow and become a leader is much faster in hospitality than in many industries,” Simmons points out. “And there are so many ways to have a positive impact on the social and environmental issues people really care about – from chefs and waiting teams tackling food waste, to people in procurement working with farmers on regenerative farming.”

Creative opportunities attract chefs

Reimagining menus to meet the needs of 21st-century sustainable diets fosters creativity and flexibility, both of which can be crucial when attracting chefs.¹⁵¹

“Chefs are the new climate rock stars,” enthuses Carolyn Ball, director for delivery of net zero, Compass Group UK&I. “I love and respect all of our 4,020 chefs! They produce amazing menus, without which we cannot drive the transition to sustainable diets. And our work on quantifying ingredient impacts is helping to identify positive changes. For example, our chefs took cream out of some of our soup offerings on learning that it has been linked to roughly five times its own weight in emissions.”

Creativity is also highly valuable for tackling waste: imaginative chefs create delicious dishes from food that would otherwise be wasted.

Allergens, calorie labels and, potentially, carbon labels can stymie creativity and flexibility by requiring chefs to follow rigid recipes that match published values. Walking the line between creativity and transparency is challenging, but operators such as ISS have invested in management systems that allow chefs to submit their own recipes and receive approval and nutritional values within a day or two.

Equality and diversity still important

Despite efforts to boost inclusivity and eradicate issues such as unconscious bias, 43 per cent of

FOOTPRINT VYPR INSIGHT



of people in the UK say diversity and inclusion are priority qualities in employers¹⁵² ▼33% in 2022

Black respondents feel ethnicity has hindered their career progression, according to a report by Be Inclusive Hospitality.¹⁵³ This compares to 37 per cent of Asian respondents, 28 per cent of mixed and 7 per cent of white. And only 38 per cent of Asian senior leaders and 39 per cent of Black senior leaders feel “very well” or “well” supported in their career progression, compared to 65 per cent of white counterparts.

Among those experiencing racism, only 23 per cent of Asian, 16 per cent of Black and 12 per cent of mixed respondents said they had been offered wellbeing support, including mental health guidance. These statistics indicate the industry needs to work harder on supporting diversity.

About this report

About Footprint Intelligence



The ever-shifting sustainability debate makes it vital for businesses to have accurate intelligence for 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 Nestlé Professional



At Nestlé Professional®, hospitality is more than just a business. It is our business. This means inspiring the next generation of culinary talent through Nestlé Professional® Toque d'Or®, striving in the field of nutrition, health and wellness, and collaborating with the industry for a more sustainable future.

About this research

Footprint Intelligence was commissioned by Nestlé Professional to create the 2023 Sustainability Index. The research comprised in-depth, semi-structured interviews with foodservice experts and sector thought-leaders, surveys with between 500-1,000 UK consumers, desk-based research, involvement in industry events and forums, and comments and insight from opinion leaders linked to the industry.

Footprint Intelligence is indebted to the industry experts who generously gave their time and insights. We particularly thank the following for their time, insights and knowledge, which were essential:

Abbey Short,

catering manager, Olympia London

Becky Haywood,

head of ESG and sustainability, Greene King

Bob Gordon,

director, Zero Carbon Forum

Carolyn Ball,

director for delivery of net zero, Compass Group UK&I

Chantelle Nicholson,

chef owner, Apricity, and Guardians of Grub ambassador

Claire Atkins Morris,

director of corporate responsibility, Sodexo

David Jackson,

director of marketing and current affairs, Winnow

Eleanor Morris,

sector specialist, WRAP

Ellie Besley-Gould,

head of purpose, Hawksmoor

Emily Tradd,

climate project manager, Net Zero Now

Emma Keller,

head of sustainability, Nestlé UK&I

Isaac Pelham-Chipper,

procurement and supply chain ESG manager, The Restaurant Group

Juliane Caillouette Noble,

managing director, the Sustainable Restaurant Association

Julie Barker,

independent consultant, Julie Barker

Julie Owst,

head of sustainability, Bidfood

Justin Turquet,

head of sustainability, Bunzl Catering Supplies

Katya Simmons,

managing director, Nestlé Professional UK&I

Keith Warren,

former CEO, Foodservice Equipment Association (FEA)

Matt Owens,

chairman, Craft Guild of Chefs and head of culinary, Alliance Group

Mike Hanson,

director of sustainable business, WSH

Paul Anderson,

managing director, Meiko UK Ltd

Philip Rowden,

global food sustainability and wellbeing manager, ISS

Pierre-Yves Paslier,

cofounder, co-CEO, Notpla

Simon Galkoff,

procurement and supply chain

About this report

director, The Big Table

Simon Heppner,

cofounder Net Zero Now, and
cofounder, the Sustainable
Restaurant Association

Tasvi Shah,

head of strategic projects, Ivy Farm
Technologies

Tessa Clarke,

cofounder and CEO, Olio

We are also grateful to consumer research expert Vypr for providing access to its consumer research panel. Surveys were published via Vypr's panel in spring 2023, garnering more than 1000 responses per yes/no question, and over 500 responses per product comparison question.



Vypr is the world's leading product intelligence platform that enables businesses to rapidly understand changing consumer behaviour through fast, cost-effective consumer insight.

Used by all stakeholders and teams that contribute to every aspect of the product journey, our platform combines expert support with the latest research technologies, to power faster and more precise product decision-making.

We deliver some of the fastest, most robust insight available through a mix of qualitative and quantitative functionality, facilitated through our mobile-first consumer communities.

Report team

Report and research lead:

Amy Fetzer

Research support:

Chris Terry

Design:

Trevor Marshall

REFERENCES

- 1 Footprint/Vypr research for this report conducted with over 500 UK consumers, March 2023
- 2 Footprint/Vypr research for this report conducted with over 1,000 UK consumers, March 2023
- 3 Footprint/Vypr research for this report conducted with over 1,000 UK consumers, May 2023
- 4 Footprint/Vypr research for this report conducted with over 1,000 UK consumers, March 2023
- 5 Footprint/Vypr research for this report conducted with over 1,000 UK consumers, March 2023
- 6 Footprint/Vypr research for this report conducted with over 1,000 UK consumers, March 2023
- 7 Footprint/Vypr research for this report conducted with over 500 UK consumers, March 2023
- 8 <https://www.weforum.org/reports/global-risks-report-2023/>
- 9 <https://www.theguardian.com/environment/2023/mar/20/ipcc-says-world-can-avoid-worst-of-climate-breakdown-if-it-acts-now>
- 10 <https://zerocarbonforum.com/assets/pdf/final-ZCF-roadmap.pdf>
- 11 <https://wrap.org.uk/resources/guide/scope-3-ghg-measurement-and-reporting-protocols-food-and-drink>
- 12 https://cdn.ymaws.com/www.ukhospitality.org.uk/resource/resmgr/2022/news/UKH_Sustainability_commitmen.pdf
- 13 https://netzeronow.org/?gclid=CjwKCAjwov6hBhBsEiwAvrvN6E_CbqU4mG0ZS3f32_ET5PTkAlnaB-1gvBNev-dMHULjTLPngBLYChoCCO8QAvD_BwE
- 14 <https://www.foodservicefootprint.com/comment-the-footprints-of-food-brands-can-be-deceptively-dainty/>
- 15 https://netzeronow.org/?gclid=EAAlaQobChMIo-PbiemA_gIVk9SyCh39AQxfEAAAYASAAEgL8XvD_BwE
- 16 <https://www.foodservicefootprint.com/comment-the-footprints-of-food-brands-can-be-deceptively-dainty/>
- 17 https://foodfoundation.org.uk/sites/default/files/2022-11/PuP_Investor%20Briefing_FI%20net%20zero%20commitments_FINALY_1.pdf
- 18 <https://www.theguardian.com/environment/2023/jan/18/revealed-forest-carbon-offsets-biggest-provider-worthless-verra-aoe>
- 19 <https://www.weforum.org/reports/global-risks-report-2023/>
- 20 <https://www.weforum.org/reports/global-risks-report-2023/>
- 21 <https://www.weforum.org/reports/global-risks-report-2023/>
- 22 <https://www.nffn.org.uk/resources/nmb/>
- 23 <https://www.weforum.org/reports/nature-risk-rising-why-the-crisis-engulfing-nature-matters-for-business-and-the-economy/>
- 24 <https://www.nestle.co.uk/en-gb/media/pressreleases/nescafe-plan-2030>
- 25 <https://www.nestle.com/media/pressreleases/allpressreleases/sustainable-coffee-nescafe-plan-2030>
- 26 <https://www.weforum.org/agenda/2023/01/barbados-bridgetown-initiative-climate-change/>
- 27 <https://www.compass-group.com/content/dam/compass-group/corporate/sustainability/sustainability-updates-2023/reports---statements/CG-Sustainability-Report-2022-Med-Res.pdf>
- 28 https://www.publicsectorcatering.co.uk/news/nhs-supply-chain-encourages-small-food-businesses-sell-fresh-produce-nhs?utm_source=emailmarketing&utm_medium=email&utm_campaign=psc_daily_update_260822&utm_content=2023-03-20
- 29 <https://www.compass-group.co.uk/media/news/compass-commits-over-16m-apprenticeship-levy-funding-to-support-100-organisations/>
- 30 Footprint/Vypr research for this report conducted with over 1,000 UK consumers, March 2023
- 31 <https://www.foodservicefootprint.com/10-key-insights-on-sustainable-diets-in-association-with-nestle-professional/>
- 32 <https://www.foodservicefootprint.com/report-designed-health-mind/>
- 33 Footprint/Vypr research for this report conducted with over 1,000 UK consumers, March 2023
- 34 <https://www.foodservicefootprint.com/10-key-insights-on-sustainable-diets-in-association-with-nestle-professional/>
- 35 https://www.publicsectorcatering.co.uk/news/school-meal-price-hike-will-harm-children-warns-food-foundation?utm_source=emailmarketing&utm_medium=email&utm_campaign=psc_daily_update_200123&utm_content=2023-03-20
- 36 https://www.publicsectorcatering.co.uk/news/research-shows-vegetable-sales-declining-cost-living-crisis?utm_source=emailmarketing&utm_medium=email&utm_campaign=psc_daily_update_140223&utm_content=2023-03-20

REFERENCES

- 37 <https://fareshare.org.uk/news-media/press-releases/fareshare-cost-of-living-crisis-appeal-charities-say-demand-for-food-is-higher-than-ever/>
- 38 https://www.publicsectorcatering.co.uk/news/school-meal-price-hike-will-harm-children-warns-food-foundation?utm_source=emailmarketing&utm_medium=email&utm_campaign=psc_daily_update_200123&utm_content=2023-03-20
- 39 Oxford Economics, The socio-economic impact of cultivated meat in the UK, Report for Ivy Farm Technologies Ltd, September 2021
- 40 <https://cedelft.eu/publications/rapport-lca-of-cultivated-meat-future-projections-for-different-scenarios/>
- 41 <https://www.crustaceancompassion.org/the-snapshot-report-2022>
- 42 Footprint/Vypr research for this report conducted with over 1,000 UK consumers, May 2023
- 43 <https://www.ingka.com/news/ikea-stores-halve-production-food-waste-saving-more-than-20-million-meals-over-four-years/>
- 44 <https://www.ingka.com/news/ikea-stores-halve-production-food-waste-saving-more-than-20-million-meals-over-four-years/>
- 45 https://thecaterer.com/news/one-in-three-hospitality-businesses-profitable?utm_source=TheCaterer&utm_campaign=tuesday
- 46 <https://mailchi.mp/1c8032b795c7/z3n712a1c1-235044?e=58a5fdc29c>
- 47 <https://mailchi.mp/1c8032b795c7/z3n712a1c1-235044?e=58a5fdc29c>
- 48 https://www.publicsectorcatering.co.uk/news/foodservice-price-index-sees-2022-end-record-high-24-food-inflation?utm_source=emailmarketing&utm_medium=email&utm_campaign=psc_daily_update_260123&utm_content=2023-03-20
- 49 <https://www.foodserviceequipmentjournal.com/one-third-hospitality-firms-at-risk-failure-inflation/>
- 50 <https://wrap.org.uk/taking-action/food-drink/initiatives/food-waste-reduction-roadmap>
- 51 <https://wrap.org.uk/taking-action/food-drink/initiatives/food-waste-reduction-roadmap>
- 52 <https://wrap.org.uk/taking-action/food-drink/initiatives/food-waste-reduction-roadmap>
- 53 https://foodfoundation.org.uk/sites/default/files/2022-11/PuP_Investor%20Briefing_FI%20net%20zero%20commitments_FINALY_1.pdf
- 54 <https://uk.sodexo.com/media/news-room/supply-chain-resilience-a4a.html>
- 55 <https://www.wwf.org.uk/press-release/hidden-waste-report-shines-light-uk-food-waste>
- 56 <https://www.iema.net/articles/the-war-on-waste>
- 57 <https://www.grocerygazette.co.uk/2022/11/30/tesco-marketplace-suppliers/>
- 58 <https://wrap.org.uk/media-centre/press-releases/food-redistribution-nearly-200000-tonnes-surplus-food-still-goes#:~:text=Whilst%20we%20welcome%20the%20increased,in%20the%20bin%20with%20it>
- 59 <https://www.nestleprofessional.co.uk/news/sustainability/food-service-what-customers-say>
- 60 <https://www.nestleprofessional.co.uk/news/sustainability/food-service-what-customers-say>
- 61 <https://resource.co/article/consumer-consciousness-around-food-waste-has-doubled-2020-report-says>
- 62 <https://wrap.org.uk/media-centre/press-releases/portion-size-main-reason-plate-waste-when-we-eat-out>
- 63 <https://cedelft.eu/publications/rapport-lca-of-cultivated-meat-future-projections-for-different-scenarios/>
- 64 https://www.meiko-uk.co.uk/fileadmin/Whitepapers/Mehrweg-Einweg/03_Whitepaper_plastikmuell_mehrweg_EN-UK_web.pdf
- 65 https://www.meiko-uk.co.uk/fileadmin/Whitepapers/Mehrweg-Einweg/03_Whitepaper_plastikmuell_mehrweg_EN-UK_web.pdf
- 66 https://www.meiko-uk.co.uk/fileadmin/Whitepapers/Mehrweg-Einweg/03_Whitepaper_plastikmuell_mehrweg_EN-UK_web.pdf
- 67 https://www.meiko-uk.co.uk/fileadmin/Whitepapers/Mehrweg-Einweg/03_Whitepaper_plastikmuell_mehrweg_EN-UK_web.pdf
- 68 <https://www.foodservicefootprint.com/reduce-reuse-recycle-why-foodservice-companies-must-press-ahead-with-their-packaging-policies-in-association-with-kp/>
- 69 <https://www.gov.uk/government/news/far-reaching-ban-on-single-use-plastics-in-england>

REFERENCES

- 70 <https://www.foodservicefootprint.com/reduce-reuse-recycle-why-foodservice-companies-must-press-ahead-with-their-packaging-policies-in-association-with-kp/>
- 71 Footprint/Vypr research for this report conducted with over 1,000 UK consumers, March 2023
72. <https://www.gov.uk/government/news/far-reaching-ban-on-single-use-plastics-in-england>
73. <https://www.gov.uk/government/news/far-reaching-ban-on-single-use-plastics-in-england>
74. <https://www.gov.uk/government/news/far-reaching-ban-on-single-use-plastics-in-england>
75. <https://www.gov.uk/government/news/far-reaching-ban-on-single-use-plastics-in-england>
76. <https://www.foodservicepackaging.org.uk/content/?contentID=9241>
77. <https://www.foodservicefootprint.com/scotland-bottles-drs-again-and-again/>, https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/1130296/DRS_Government_response_Jan_2023.pdf, <https://www.gov.uk/government/consultations/packaging-and-packaging-waste-introducing-extended-producer-responsibility>
78. <https://wrap.org.uk/resources/report/single-use-cups-and-go-fibre-composite-food-packaging>
- 79 https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/1130296/DRS_Government_response_Jan_2023.pdf
- 80 https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/1130296/DRS_Government_response_Jan_2023.pdf
- 81 <https://wrap.org.uk/resources/report/uk-plastics-pact-annual-report-2021-22>
- 82 <https://cedelft.eu/publications/rapport-lca-of-cultivated-meat-future-projections-for-different-scenarios/>
- 83 <https://www.supplychain.nhs.uk/news-article/single-use-plastic-removal-next-phase/#:~:text=Following%20the%20Government%20announcement%20that,consumables%20'how%20to%20guide'>
- 84 https://www.lifecycleinitiative.org/wp-content/uploads/2021/02/UNEP_-LCA-Beverage-Cups-Report_Web.pdf
- 85 https://www.meiko-uk.co.uk/fileadmin/Whitepapers/Mehrweg-Einweg/03_Whitepaper_plastikmuell_mehrweg_EN-UK_web.pdf
- 86 Footprint/Vypr research for this report conducted with over 1,000 UK consumers, March 2023
- 87 Footprint/Vypr research for this report conducted with over 500 UK consumers, March 2023
- 88 Footprint/Vypr research for this report conducted with over 500 UK consumers, March 2023
- 89 Footprint/Vypr research for this report conducted with over 1,000 UK consumers, March 2023
- 90 <https://www.foodservicefootprint.com/safe-spaces-for-green-claims-shrink-further/>
- 91 <https://www.gov.uk/government/collections/misleading-environmental-claims>
- 92 <https://www.foodservicefootprint.com/food-and-drink-targeted-in-new-greenwash-offensive/>
- 93 <https://www.foodandlandusecoalition.org/knowledge-hub/regenag-people-nature-climate/>
- 94 <https://www.fca.org.uk/news/news-stories/fca-outlines-improvements-needed-esg-benchmarks>
- 95 <https://www.southpole.com/en/publications/net-zero-and-beyond>
- 96 <https://www.foodservicefootprint.com/footprint-40-mike-berners-lee>
- 97 <https://mailchi.mp/69298675f808/z3n712a1c1-234224?e=58a5fdc29c>
- 98 <https://www.justeattakeaway.com/newsroom/en-GB/221353-just-eat-reveals-the-uk-s-top-food-habits-for-2022>
- 99 http://go.greenbiz.com/MjExLU5KWS0xNjUAAAGJaOAXRSYJ-4uwem8KYvE-MUKdFvpRGvsLXyWAZe_g3Z5FjywMM6PAgOZxyz-gauvGerpRmOo=
- 100 https://www.publicsectorcatering.co.uk/news/fifth-brits-planning-ditch-meat-entirely-christmas-day?utm_source=emailmarketing&utm_medium=email&utm_campaign=psc_daily_update_201222&utm_content=2023-03-20
- 101 <https://commonslibrary.parliament.uk/research-briefings/sn03336/>
- 102 <https://foodfoundation.org.uk/publication/state-nations-food-industry-report>
- 103 Adams J, Goffe L, Brown T, Lake AA, Summerbell C, White M et al. Frequency and socio-demographic correlates of eating meals out and take-away meals at home: cross-sectional analysis of the UK national diet and nutrition survey, waves 1–4 (2008–12). *Int J Behav Nutr Phys Act.* 2015;12:51. doi: 10.1186/s12966-015-0210-8. 70. Nguyen BT, Powell LM. The impact of restaurant consumption among US adults: effects on energy and nutrient intakes. *Public Health Nutr.* 2014;17(11):2445–52. doi: 10.1017/S1368980014001153, both quoted in: <https://apps.who.int/iris/bitstream/handle/10665/353747/9789289057738-eng.pdf?sequence=1&isAllowed=y>

REFERENCES

- 104 Tedstone A, Coulton V, Targett V, Bennett A, Sweeney K, Morgan K et al. Sugar reduction and wider reformulation programme: report on progress towards the first 5% reduction and next steps. London: Public Health England; 2018 (<https://www.gov.uk/government/publications/sugar-reductionreport-on-first-year-progress>). Quoted in: <https://apps.who.int/iris/bitstream/handle/10665/353747/9789289057738-eng.pdf?sequence=1&isAllowed=y>
- 105 <https://mailchi.mp/f5bb60b08533/morning-briefing-232060?e=58a5fdc29c>
- 106 https://nielseniq.com/global/en/insights/analysis/2023/consumer-outlook-2023-the-unsettled-state-of-global-consumers/?utm_source=niq_newswire_newsletter&utm_campaign=CMP-01852-V4H8T&utm_medium=email&utm_content=Global_#msdyntrid=RlxTxl3ES06PKS5KcqcKnD-KNtMo9tq0J6fyfjkgvp0
- 107 <https://wrap.org.uk/media-centre/press-releases/portion-size-main-reason-plate-waste-when-we-eat-out>
- 108 https://nielseniq.com/global/en/insights/analysis/2023/consumer-outlook-2023-the-unsettled-state-of-global-consumers/?utm_source=niq_newswire_newsletter&utm_campaign=CMP-01852-V4H8T&utm_medium=email&utm_content=Global_#msdyntrid=RlxTxl3ES06PKS5KcqcKnD-KNtMo9tq0J6fyfjkgvp0
- 109 https://www.publicsectorcatering.co.uk/news/hospitality-industry-serves-fundraising-record-action-against-hunger-uk?utm_source=emailmarketing&utm_medium=email&utm_campaign=psc_daily_update_270123&utm_content=2023-03-20
- 110 https://www.publicsectorcatering.co.uk/news/hospitality-industry-serves-fundraising-record-action-against-hunger-uk?utm_source=emailmarketing&utm_medium=email&utm_campaign=psc_daily_update_270123&utm_content=2023-03-20
- 111 https://www.publicsectorcatering.co.uk/news/sysco-gb-extends-partnership-food-redistribution-charity-city-harvest?utm_source=emailmarketing&utm_medium=email&utm_campaign=psc_daily_update_270123&utm_content=2023-03-20
- 112 Footprint/Vypr research for this report conducted with over 1,000 UK consumers, March 2023
- 113 Footprint/Vypr research for this report conducted with over 1,000 UK consumers, March 2023
- 114 https://www.nespresso.com/ecom/medias/sys_master/public/14477249675294/Nespresso-Professional-What-s-Next-For-Hospitality.pdf
- 115 [https://insights.zonal.co.uk/hubfs/Go%20Tech%20Reports/Zonal%20GO%20Technology%20Report%20Bookings%20\(April%202022\).pdf](https://insights.zonal.co.uk/hubfs/Go%20Tech%20Reports/Zonal%20GO%20Technology%20Report%20Bookings%20(April%202022).pdf)
- 116 Data shared with Footprint
- 117 <https://www.hgem.com/opinion/accessibility-in-hospitality>
- 118 <https://mailchi.mp/18ce1d9397b8/breakingnews-234332?e=58a5fdc29c>
- 119 Footprint/Vypr research for this report conducted with over 1,000 UK consumers, March 2023
- 120 <https://www.gov.uk/guidance/super-deduction>
- 121 https://www.brita.co.uk/invisible-waste-hospitality?utm_medium=Affiliate&utm_source=BRITA_PressRelease&utm_campaign=UK_UK_B2B_QuellST_Invisible-Waste_20220720_Conversion&utm_content=InvisibleWaste_1x1
- 122 <https://scanmarket.com/en/blog/uk-legislation-affecting-procurement-and-supply-chain-management/>
- 123 https://wrap.org.uk/sites/default/files/2023-03/Water%20Roadmap%20Progress%20Report%20Nov%202021-March%202023_0.pdf
- 124 https://wrap.org.uk/sites/default/files/2023-03/Water%20Roadmap%20Progress%20Report%20Nov%202021-March%202023_0.pdf
- 125 Footprint/Vypr research for this report conducted with over 1,000 UK consumers, March 2023
- 126 <https://www.ukhospitality.org.uk/news/633367/RECORD-EMPLOYMENT-FIGURES-SHOW-HOSPITALITYS-GROWTH-POTENTIAL.htm#:~:text=Even%20with%20vacancies%2064%25%20higher,action%20at%20the%20Spring%20Budget.>
- 127 <https://www.hospitalityandcateringnews.com/2022/03/the-state-of-hospitality-2022-insight-report-published-by-sommet-education/#:~:text=Writing%20in%20The%20State%20of,to%20welcome%20and%20please%20others.>
- 128 https://www.thecaterer.com/news/hospitality-staff-shortages-industry-lose-trade?utm_source=TheCaterer&utm_campaign=friday
- 129 <https://www.sheffield.ac.uk/news/city-centres-could-lose-ps3-billion-due-permanent-changes-caused-covid-19-new-study-reveals>
- 130 <https://resources.harri.com/blog/transforming-the-employee-experience-in-hospitality-ten-key-takeaways/>

REFERENCES

- 131 <https://kam-media.co.uk/wp-content/uploads/2022/11/Hospitality-Rising-The-Current-State-of-Play-Oct-2022.pdf>
- 132 <https://kam-media.co.uk/wp-content/uploads/2022/11/Hospitality-Rising-The-Current-State-of-Play-Oct-2022.pdf>
- 133 <https://cedelft.eu/publications/rapport-lca-of-cultivated-meat-future-projections-for-different-scenarios/>
- 134 <https://cedelft.eu/publications/rapport-lca-of-cultivated-meat-future-projections-for-different-scenarios/>
- 135 https://www.thecaterer.com/news/hospitality-salaries-raised-industry-growth-threatened?utm_source=TheCaterer&utm_campaign=monday
- 136 <https://mailchi.mp/1c8032b795c7/z3n712a1c1-235044?e=58a5fdc29c>
- 137 <https://cedelft.eu/publications/rapport-lca-of-cultivated-meat-future-projections-for-different-scenarios/>
- 138 Footprint/Vypr research for this report conducted with over 1,000 UK consumers, March 2023
- 139 Footprint/Vypr research for this report conducted with over 1,000 UK consumers, March 2023
- 140 <https://media.graphassets.com/oplJztMvQ3iodd5S398V>
- 141 <https://www.drinksindustryireland.ie/technology-can-improve-hospitality-workers-experience/>
- 142 Footprint/Vypr research for this report conducted with over 1,000 UK consumers, March 2023
- 143 <https://craftguildofchefs.org/news/burnt-chef-project-supports-hospitality-managers-mental-health-training>
- 144 <https://craftguildofchefs.org/news/craft-guild-partners-kellys-cause>
- 145 <https://www.thecaterer.com/news/bidfood-hospitality-action-check-please-campaign>
- 146 <https://www.foodservicefootprint.com/over-50s-can-plug-labour-gaps/>
- 147 <https://www.bigissue.com/news/employment/how-one-small-tea-shop-plans-to-empower-1260-refugees-nemi-teas-pranav-chopra/>
- 148 https://www.publicsectorcatering.co.uk/news/springboard-helps-10000-young-people-hospitality-industry?utm_source=emailmarketing&utm_medium=email&utm_campaign=psc_daily_update_161222&utm_content=2023-03-20
- 149 <https://www.nestleprofessional.co.uk/sites/default/files/2023-02/Choose%20Hospitality%20Pledge%20-%20Opening%20Doors%20Report.pdf>
- 150 <https://hospitalityinspired.sommet-education.com/index.php/media-center/state-hospitality-2022-insight-report-published-sommet-education>
- 151 <https://www.foodservicefootprint.com/wp-content/uploads/2016/06/Foodservice-Nutrition-White-Paper-2016.pdf>
- 152 Footprint/Vypr research for this report conducted with over 1,000 UK consumers, March 2023
- 153 <https://bihospitality.co.uk/download-the-inside-hospitality-report-2022/>



FOOTPRINT INTELLIGENCE

1 Strengthening strategy, culture and the supply chain

2 Delivering sustainable diets

3 Addressing food and packaging waste

4 Attracting and retaining clients and consumer

5 Saving energy and protecting natural resources

6 Encouraging creativity, boosting inclusivity and fostering wellbeing