



Footprint Sustainability Index 2024

The foodservice guide to a more sustainable future



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Foreword



Katya Simmons
Managing director,
Nestlé Professional UK&I

Climate change is not a future issue, it's happening here and now. And the impacts of climate change, continued to affect more people and ecosystems around the world in 2023, notably through extreme weather events. Supply shortages continued to drive costs in an unsustainable upwards trajectory, which, among other challenges, contributed to a persistent cost-of-living crisis, making it another challenging year for foodservice and hospitality businesses. Despite this, we've seen more organisations step up and lead from the front, doubling down on their sustainable practices in the UKs drive to Net Zero.

A key theme in this year's report is the need to prioritise action with transition plans that set out how commitments will be achieved. At Nestlé, we're committed to playing our part to mitigate climate change and reach Net Zero emissions against our 2018 baseline by 2030,

even as we grow. As highlighted in the report, such targets can only be achieved by tackling scope three emissions to reduce the impacts of ingredients, and supporting supply chains to do this. This is why regenerative agriculture remains a key pillar in delivering our targets: we've committed to sourcing 20% of key ingredients through regenerative practices by 2025, growing to 50% by 2030. Initiatives like the Nescafé Plan 2030 and the Nestlé Milk Plan are prime examples of how we're working collaboratively with our supply chains transition towards more regenerative practices. In 2023, the Nescafé Plan 2030 provided training on regenerative agricultural practices to over 148,000 farmers across 16 countries. Additionally, Nescafé distributed 21 million high-yield, disease-resistant, and drought-tolerant coffee plantlets. Simultaneously, the Nestlé Milk Plan helped to enhance the sustainability and efficiency of our supply chain,

targeting a 50% reduction in emissions from milk sourcing by 2026, compared to a 2018 baseline.

As well as taking a pragmatic approach in our journey to Net Zero, it's crucial that we continue finding creative solutions to drive meaningful long-term improvements to the sustainability of our industry. We urgently need young, dynamic and diverse talent to help identify innovative approaches to the challenges ahead. With staff shortages reaching record highs, this report offers industry insights on attracting, retaining, and motivating staff. At Nestlé Professional, we are addressing recruitment challenges head-on by collaborating with organisations and business leaders through the 'Choose Hospitality Pledge.' This industry-wide alliance aims to transform the perception of hospitality careers and attract more talent to our vibrant industry. And through our prestigious hospitality competition Nestlé Professional Toque d'Or, now in its 36th year, we're providing up-to-the-minute learning and real-life challenges to aspiring hospitality professionals.

I encourage you to read this year's report. It's packed with inspiring solutions, the latest research, and frameworks for implementing and evaluating change. This report demonstrates what our industry can achieve during times of intense pressure. And it highlights the exciting potential for further growth, creativity, and success in our collective journey towards Net Zero and to a more resilient and thriving food system over all.

Executive summary: 2024 insights

Welcome to the 2024 Footprint Sustainability Index

This year will be remembered as one in which businesses began to make good on ambitious net-zero commitments. With much of the low-hanging fruit now picked, the focus has shifted to the challenge of achieving deep decarbonisation of food and drink supply chains.

At the same time, there is growing recognition that carbon is not the only game in town. Decarbonisation is part of a holistic approach to environmental improvement that spans key indicators such as biodiversity, soil health and water.

Our polls of the public indicate that – despite ongoing issues with the cost of living and global conflicts – climate concern is proving resilient and, in some cases, bouncing back after a dip last year. For example, nearly a third said they choose a place to eat because of its ethics – up from a quarter in 2023. Thirty-seven per cent would stop using a restaurant, pub or café if they thought it was wasting energy – up nearly 10% from 2023.

This year’s Sustainability Index is packed with businesses making positive strides in areas such as net-zero, waste and packaging. It also contains hard truths: progress in certain areas is not nearly fast

enough. Food waste reduction needs to increase significantly if targets are to be reached, while engagement on water scarcity remains, well, scarce.

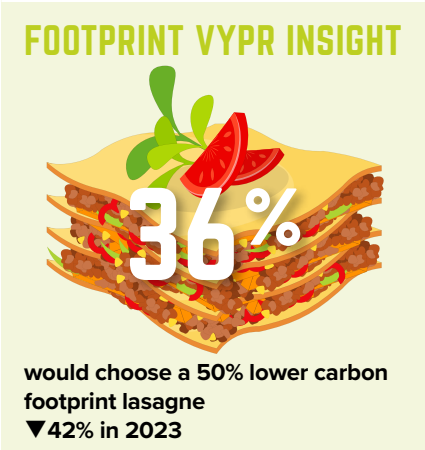
Efforts to improve diversity and inclusion are ongoing – with, this year, a particular focus on mental health and wellbeing and neurodiversity. Drawing on insights generously shared by leaders in the hospitality and foodservice sector, consumer research conducted exclusively for this report by Vypr, and wider industry analysis, the 2024 Footprint Sustainability Index contains the knowledge you need to deliver your ESG goals.



Executive summary: 2024 insights

Strengthening strategy, culture and the supply chain

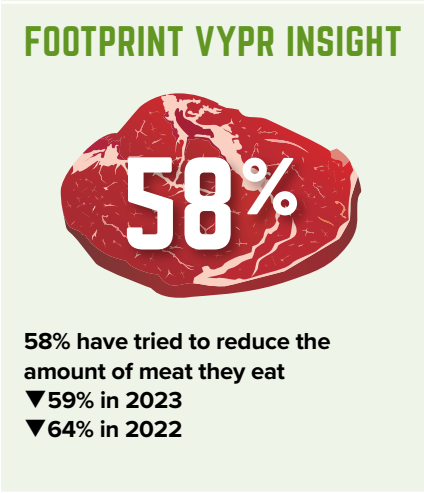
“Going into 2025-26, we need to be thinking about transition plans. If you’ve made a commitment to net-zero, you’ve now got to tell me how you are going to do it.”
Oliver Rosevear, director of sustainability, Fuller’s



- Need-to-know insights for 2024-25:**
- prioritise action over ambition on net zero
 - focus on menus and agricultural practices to reduce emissions
 - look beyond carbon
 - be ready for increased reporting and standardisation
 - deforestation rules driving change
 - support farm-level data
 - provide financial support for producers to drive regenerative transition
 - focus on diversity and human rights
 - build long-term resilience despite cost challenges

Delivering sustainable diets

“There’s an amazing role for chefs as change makers: chefs help drive food trends.”
Verity Lawson, group head of sustainability, SSP



- The need-to-know insights for 2024-25:**
- reengineer menus and reduce ingredient impact
 - normalise meat reduction
 - shift from meat alternatives to more plants, better meat
 - recognise chefs as change-makers
 - lower livestock’s impact
 - support and communicate regenerative practices

Attracting and retaining clients and consumers

“Generally, our customers show interest in how we work to reduce impacts, whether that’s ordering dishes that positively help to reduce food waste or asking our team about sustainability.”
Andrea Zick, Sustainability Forum Lead and PA to GM at OXO Tower Restaurant, Bar & Brasserie



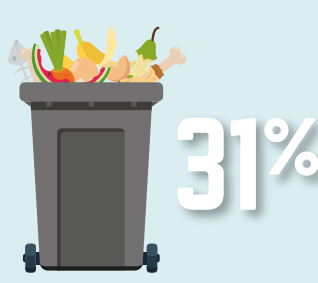
- The need-to-know insights for 2024-25:**
- join the carbon labelling revolution
 - understand customer choice motivators
 - keep customer cost sensitivity in mind
 - focus on low-impact options
 - share green claims carefully

Executive summary: 2024 insights

Addressing food and packaging waste

“We’re pushing for mandatory food-waste reporting for large and medium-sized businesses because that’s the only way to drive systemic change.”
Claire Atkins Morris, director of sustainability, Sodexo UK & Ireland

FOOTPRINT VYPR INSIGHT



31%

would choose a place to eat because it is tackling food/plastic waste
▲26% in 2023
▲28% in 2022

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

Food Waste

- go further in tackling food waste and push for mandatory reporting
- take redistribution to the next level
- make a virtue of sharing surplus
- embrace hot food redistribution
- innovate to reduce waste
- harness AI’s waste-saving potential

Packaging waste

- don’t let an uncertain legislative landscape derail packaging plans
- swap materials with care
- explore novel packaging solutions
- invest in reuse

Saving energy and protecting natural resources

“You haven’t got access to free water. You pay for it all the time – no matter how much has dropped from the sky.”
Paul Anderson, managing director, Meiko UK

FOOTPRINT VYPR INSIGHT



37%

would stop using a restaurant, pub or café if they thought it was wasting energy
▲28% in 2023

The need-to-know insights for 2024-25:

- prioritise energy efficiency and electrification
- recognise biodiversity as an urgent issue
- take water scarcity seriously

Encouraging creativity, boosting inclusivity and fostering wellbeing

“Mental health support is the biggest concern for the industry in relation to staff retention”
Kate Nicholls, CEO, UKHospitality

FOOTPRINT VYPR INSIGHT



31%

say doing the right thing for people and the planet is a priority quality in an employer
▲29% in 2023
▼35% in 2022

The need-to-know insights for 2024-25:

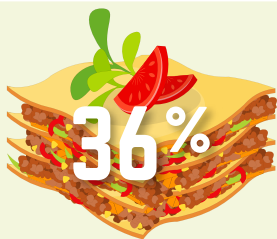
- address talent and skills shortages
- take action on neurodiversity
- use recruitment to boost representation
- keep mental health top of mind
- invest to attract young people
- target marginalised groups for employment
- focus on upskilling in sustainability

1 Strengthening strategy, culture and the supply chain

“Going into 2025-26, we need to be thinking about transition plans. If you’ve made a commitment to net-zero, you’ve now got to tell me how you are going to do it.”

Oliver Rosevear, director of sustainability, Fuller’s

FOOTPRINT VYPR INSIGHT



would choose a 50% lower carbon footprint lasagne
▼42% in 2023

The need-to-know insights for 2024-25:

- prioritise action over ambition on net zero
- focus on menus and agricultural practices to reduce emissions
- look beyond carbon
- be ready for increased reporting and standardisation
- deforestation rules driving change
- support farm-level data
- provide financial support for producers to drive regenerative transition
- focus on diversity and human rights
- build long-term resilience despite cost challenges

Prioritise action over ambition on net-zero

If the early years of the 2020s were characterised by businesses making eye-catching net-zero commitments, the past twelve months have signified the beginning of a shift from ambition to action.

With the low hanging fruit having largely now been picked in respect of reducing scope 1 and 2 emissions (by, for example, switching to renewable energy supplies or purchasing plug-in electric vehicles for company car fleets), businesses are getting serious about the task of reducing the scope 3 value chain emissions that account for the lion’s share of their total.

“Since the run up to COP26, we’ve seen a lot of people commit to net-zero, it’s been a big push from pretty much all the sector,” says Fuller’s director of sustainability Oliver Rosevear. “I think the question now is around the ‘how’? A lot of commitments were made with the

best intentions but without really getting under the skin of exactly how we’re going to achieve that, particularly around scope 3.” This means setting out transition plans that clearly and transparently set out the costs and actions to achieve these net zero commitments.

This requires a cultural as well as a strategic shift within organisations, with long-term leadership buy-in and all functions within the business – not just the sustainability team – pulling the levers available to them to achieve deep and sustained decarbonisation.

Focus on menus and agricultural practices to reduce emissions

Ingredients are an increasingly key focus of decarbonisation efforts. Rebalancing menus – for example, away from higher carbon ingredients, such as animal proteins, and towards plant-based ingredients

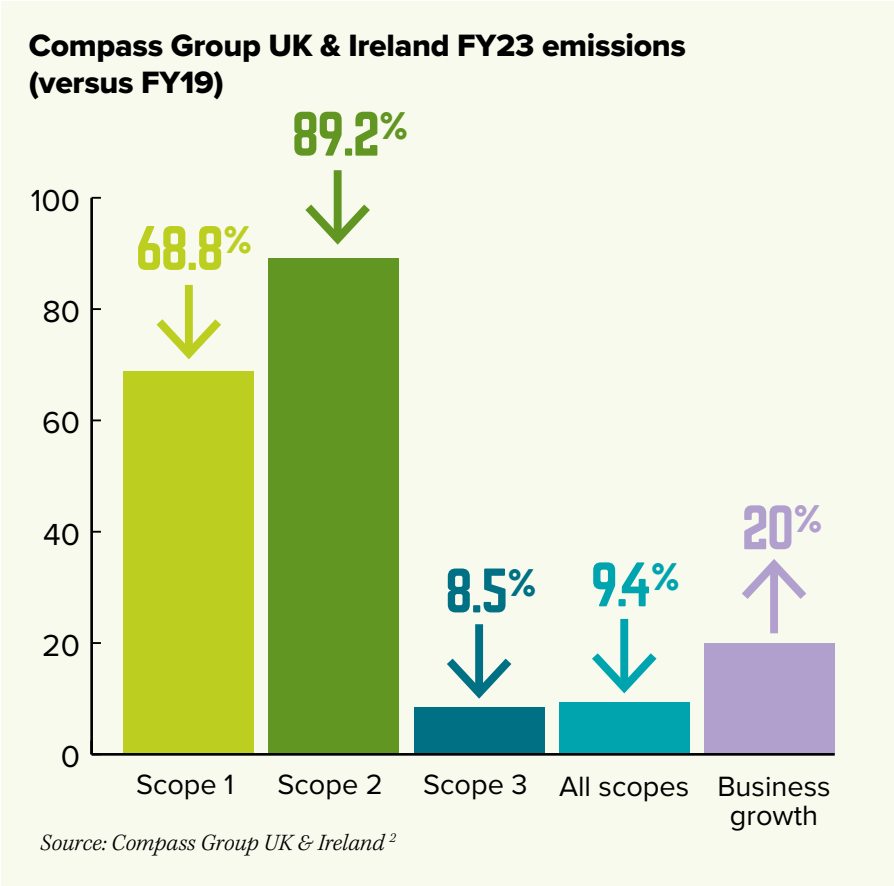


– can help reduce the emissions associated with food.

Compass Group UK & Ireland claimed an industry first in February 2024 with the publication of its first climate transition plan.¹ It reported an 8.5% reduction in scope 3 emissions and a 9.4% absolute reduction in emissions (scope 1, 2, 3), inclusive of 20% business growth (FY19 baseline to FY23).

The results – which have been transparently reported so they can be compared against baselines and other operators’ results, to enable genuine comparisons – are attributed to overlapping areas of change, including better measurement, business growth and the decarbonisation of services. Chef-led reformulation and rationalisation of recipes to reduce their carbon impact is highlighted within the plan. These are the result of a strategic partnership with sustainability analysts Foodsteps, who examined thousands of recipes in FY23. Other businesses across all segments of the industry have taken similar steps to support a shift to more sustainable diets (see **Delivering sustainable diets**).

Work is also ramping up, albeit at a slower pace, to understand how a shift in agricultural practices to more regenerative methods can support a net-zero agenda. This reflects the fact that consumers will still want to eat meat and dairy long into the future, so how can businesses ensure the meat and dairy they do source – along with all of their ingredients – have the lowest possible environmental footprint?



Look beyond carbon

The work to reformulate menus links to a second key trend – a realisation that carbon reduction is not the only game in town. Although the practical task of decarbonising business models remains a key strategic focus for hospitality and foodservice businesses (HaFS), there is growing acknowledgement that this must be part of a holistic approach that is mindful of the wider impacts of business practices on key environmental indicators like soil health, biodiversity and water pollution, as well as social and ethical considerations like animal welfare and farmer livelihoods.

Businesses increasingly understand the importance of supporting farmers on their journey towards the adoption of regenerative agricultural practices that can deliver these environmental and social benefits. They are also mindful that the payoff from this work will not be nearly as immediate as that achieved by making changes to menus, since an entire supply chain needs to be bought into the sustainable farming transition.

Expectations are growing that suppliers at all stages of the value chain will need to support buyers on this journey or risk being frozen out of commercial contracts. Sodexo UK

& Ireland launched a new net-zero supply chain engagement strategy in October 2023 in which it set out its intention to cease working with suppliers that have failed to demonstrate tangible progress towards achieving net-zero by 2030.³ As of January 2024, the evaluation criteria of all tenders will include a minimum 10% social value weighting.

Be ready for increased reporting requirements and standardisation

“Well-thought-through regulation helps by levelling the playing field.”

Robin Sundaram, community regeneration lead for Nestlé UK & Ireland

All of this is set against the backdrop of a hugely challenging time for businesses trying to remain competitive versus their peers while coping with external factors including political instability, global conflict and climate change, which have pushed up the cost of food and energy and impacted the availability of certain ingredients. “Trying to prioritise sustainable sourcing and practices when you’re trying to keep prices down is tough,” says Vince Kelly, manager at the Hospitality Skills Academy, Westminster Kingsway.

Companies also have an ever-evolving regulatory sphere to

navigate. Mandatory requirements like climate-related financial disclosures and gender pay gap reporting are placing a considerable administrative burden on sustainability teams. Add to the mix a growing list of voluntary reporting requirements via initiatives like the Science-based targets initiative (SBTi)⁴ and the Courtauld Commitment 2030⁵ and the pressure on teams to generate robust data across a broad set of metrics grows ever greater.

Upcoming regulations are designed to focus on consistency, transparency and accountability in sustainability reporting. The EU’s Corporate Sustainability Reporting Directive⁶ (CSRD) aims to modernise and strengthen rules regarding the social and environmental information that companies have to disclose, with the first reports due to be published in 2025. “For organisations, I think they’ll see that as a bit of a catalyst to go, ‘You know what, our data does need to improve and from a disclosure perspective we’ll have to start really thinking transparently about what we can put out in the public domain,’” says Claire Atkins Morris, Sodexo UK & Ireland’s sustainability director.

The UK government is updating its reporting requirements in line with the International Sustainability Standards Board (ISSB) – a comprehensive global baseline of sustainability disclosures focused on the needs of investors and the financial markets.⁷ “That will be absolutely critical,” says Claudia

Candiotto, head of responsible business at Azzurri Group, “since it will lead to greater clarity around best practice and greater standardisation of reporting.”

In May, the UK Government confirmed it will create new Sustainability Reporting Standards from 2025 that are set to be closely based on the voluntary standards of the ISSB.⁸

Deforestation rules driving change

Arguably the most significant new regulations on the immediate horizon relate to deforestation. The EU’s flagship deforestation regulation, the EUDR,⁹ will require forest-risk commodities – including beef, wood, cocoa, soy, palm oil and coffee – to be deforestation-free regardless of whether deforestation is legal in the country of production.

The UK Government, meanwhile, plans to make it mandatory for large companies, including those in the food and drink sector, to carry out due diligence to ensure no illegal deforestation in their supply chains for forest-risk commodities such as soy and palm oil.

The EUDR is due to come into effect at the end of

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this year, while the UK Government still needs to pass secondary legislation before its new law makes it onto the statute book. Ministers, meanwhile, have rejected calls from the Environmental Audit Committee to extend the regime to include all deforestation, including that carried out legally, which would bring the UK closer into line with the EU.

The urgent need to tackle deforestation in food supply chains was laid bare in WWF’s 2023 report into the impact of UK shopping baskets on climate and nature.¹⁰ Against a target of all soy to be verified deforestation and conversion-free by 2025, just 5% of the total volume sourced by nine retailers met these criteria in 2023, and there remains no direct importer of soy to the UK with a commitment to handle only deforestation and conversion-free soy.

Although these types of regulation increase the reporting burden on businesses, “one of the positives, if you get it right, is that you level the playing field, because some companies like ours have been doing more for a number of years, but we haven’t been able to reflect that in the cost,” explains Robin Sundaram, community regeneration lead for Nestlé UK & Ireland.

Sundaram says regulation has helped spur his organisation to do even more because it creates the business case “to find or divert more resources into areas like deforestation”.

Others, however, express fears that a growing regulatory burden risks squeezing out smaller suppliers who are unable to meet the additional demands customers will place on them. “There’s a possibility this could lead to less agility and flexibility in supply chains, particularly in foodservice,” says Verity Lawson, group head of sustainability at SSP.

**Deforestation and conversion-free products are not produced on land that has been converted from natural habitats including forests, grasslands, wetlands, and savanna after a defined time period, such as 2015.*

Support farm-level data

Corporate bandwidth is also being taken up with the task of generating accurate, standardised data at a farm level for key indicators such as carbon emissions. This is a high priority for businesses who want to demonstrate meaningful impact through changes to their sourcing practices but it’s also complex, often slow work, with the result that a lot of emissions data is still based on product averages (secondary data) rather than supply-chain-specific, primary data.

Claudia Candiotto says a key question for Azzurri Group is how to engage suppliers meaningfully in obtaining life cycle assessment (LCA) data for individual products: “We currently have a gap where suppliers can be on the journey towards adopting more sustainable practices, but they aren’t yet in a position to provide us with accurate information. That has started conversations with our peers around, ‘How do we engage suppliers on this front, how do we get the information, and to what standard?’ That’s a massive conversation.”

This conversation is supported by third parties like WRAP, which continues to develop standardised scope 3 measuring protocols,¹¹ and Zero Carbon Forum. “For some commodities, we were able to join forces with other members of the Zero Carbon Forum and that has been very effective,” explains Candiotto. “We have a dairy working group where we’re sharing knowledge on the dairy industry



and learning from each other, such as how to ask suppliers the right questions, and understanding best practices in the industry.”

Provide financial support for producers to drive regenerative transition

One question in particular has forced its way into the conversation around supply chain transformation: how can farmers be supported financially during a transition to the regenerative practices that will require them to improve indicators like soil health,

biodiversity and water quality, while minimising carbon emissions?

Around 50% of global GDP is dependent on the services nature provides,¹² yet natural capital is not factored into market prices. “We need to rethink the relationship that exists between price and value; what should the price be for the consumer, and what does the market structure need to look like to facilitate it, in a way that’s cognisant of externalities like health and environment,” observes director for delivery of net-zero at Compass Group UK & Ireland, Carolyn Ball.

“High-yielding agriculture can of course be good, giving us space for biodiversity, etc. But there are elements of industrial practice that need addressing; including how we factor externalities into prices. A food market that better serves private and societal goals will make it easier for farmers to do the right thing – we have to work hard on what that requires of us in practice. This is exciting as many ideas are emerging on how we can produce and price enough food sustainably. We want to be part of that dialogue, and to help bridge the gap between concept, perception and reality. Regenerative agriculture has a role to play in bridging that gap but it requires better data and better definitions.”

To transition to a nature-positive, climate-resilient and healthy future, argues Ball, the economics of our supply chain need rewiring as part of a wider social project informed by ecological science: “At the intersection of academia, government and business there are so many opportunities that can help us all achieve this together – strengthening collaborations to find commercially attractive, socially inclusive solutions, faster.”

Speaking at a Footprint Forum on regenerative agriculture in March,¹³ Nestlé’s community regeneration lead Robin Sundaram talked of a “fundamental rethink” in how to finance the transition, given it is a “real shift in our expectations [of] what farmers are doing”. This kind of partnership approach is the result of a significant cultural shift that has become the company’s norm:

“You have to develop these long-term partnerships and we can’t continue to do [things] the way we’ve always done it.”

Focus on diversity and human rights

Beyond nature and the environment, social sustainability remains a priority for the HaFS sector. Work continues to ensure greater representation of under-represented groups, such as ethnic minorities and neuro-diverse people, at the top of organisations and to ensure greater parity of pay (see **Encouraging creativity, boosting inclusivity and fostering wellbeing**).

There is growing awareness too of the risk to HaFS businesses of modern slavery within their supply chains, particularly in farming, distribution and construction. Sundaram says modern slavery is an “unseen crime” that “doesn’t get talked about enough”, although there is now “a focus on it from within the industry”.

Oliver Rosevear says that Fuller’s is “very aware of these risks and has provided training for our teams to make sure they’re confident in identifying and reporting modern slavery. We’re also working with our suppliers to make sure they’ve got the right controls in place.”

Build long-term resilience despite cost challenges

For all the myriad cost and profitability challenges facing the sector, dropping the ball on sustainability is not an option,

according to experts interviewed for this year’s Index. On the contrary, those businesses that confront the risks to their future security and prosperity head-on will be best placed to deal with challenges coming down the track.

“The risk and resilience piece is going to be huge and drive action over the next five years,” says Zero Carbon Forum director Bob Gordon. “Over the past three years, we’ve seen a significant increase in extreme weather events: 40 degree heat in the UK causing chickens to die from heat; drought in southern Europe impacting tomatoes and olive oil. That’s genuinely beginning to bite now in terms of people saying, ‘Hang on, I need to build resilience.’”

Zero Carbon Forum is running

a three-phase project with brewers to map their biggest risks, then quantify those risks in terms of the impact on yield and cost, and finally think about how to mitigate the risks. “It’s no longer a woolly conversation,” says Gordon. “You’ve now got data to help make those decisions.”

“Climate change is hitting supply chains, so avoiding risk and building resilience will really drive action over the next five years.”

Bob Gordon, director, Zero Carbon Forum



2 Delivering sustainable diets

“There’s an amazing role for chefs as change-makers: chefs help drive food trends.”

Verity Lawson, group head of sustainability, SSP

FOOTPRINT VYPR INSIGHT



have tried to reduce the amount of meat they eat
▼59% in 2023
▼64% in 2022

Need-to-know insights for 2024-25

- reengineer menus and reduce ingredient impact
- normalise meat reduction
- shift from meat alternatives to more plants, better meat
- recognise chefs as change-makers
- lower livestock’s impact
- support and communicate regenerative practices

Reengineer menus and reduce ingredient impact

A year ago, businesses were publicly talking about their intention to decarbonise the food on their menus as part of plans to reduce

scope 3 emissions. That talk has quickly translated into action with a two-pronged approach to supporting a shift to sustainable diets:

1. Reengineering menus to use lower impact ingredients
2. Shifting to more sustainable versions of the same ingredients

The focus to date has largely been on option one, with foodservice operators leading the charge. Sodexo UK & Ireland has pledged that, by 2030, 70% of all the main meals it produces will be low-carbon, defined in partnership with WWF as one that generates 0.9kgCO₂e or less. In its latest net-zero progress report, published in January,¹⁴ the business reported a 37% reduction in absolute GHG emissions across scopes 1, 2 and 3, compared to its baseline year of 2017, including a 36% reduction in scope 3 emissions.

Normalise meat reduction




Key to the menu decarbonisation described above is a redesign of menus to introduce more plant-based meals (those that contain no animal products) and plant-forward options (meals that contain mainly plants and minimal amounts of animal products). A third of the dishes on Sodexo’s centrally designed menus are now plant-based.

At Compass Group UK & Ireland, the detail behind its strategic reformulation and rationalisation of recipes was shared in a transition plan, which also references the expertise of its nutrition and dietetics team to ensure reformulated menus do not compromise the nutritional profile of its meals. Compass’s chefs have been experimenting with different ingredients and measuring the impact of specific changes.

Analysis is supported by a strategic partnership with sustainability-focused tech

company Foodsteps, and recipes are rated to identify their carbon impact. In FY23, more than 21,000 recipes were centrally analysed and a subset assessed to understand the percentage split of A-E ratings for its main meals. Twenty-five per cent of the subset recipes had A-B rated footprints, indicating an impact of less than 2.9kg CO₂e per kilo of food.¹⁵

FOOTPRINT VYPR INSIGHT



eat plant-based versions of favourite dishes when eating out
▼54% in 2023

Restaurants pump up plant power

The shift towards plant-based is also visible in the casual dining market. “With chains like Wagamama moving to making 50% of their menu plant-based, it is starting to become the norm,” says UKHospitality chief executive Kate Nicholls.

Wahaca has also been working to reduce the carbon footprint of its menu, with a particular focus on beef. “We did it in three steps,” explains the Mexican restaurant chain’s head of commercial,


sustainability and strategic projects, Cameron Holder. “The first thing is we reduced the number of beef options on our menu to just two, so we now have a beef taco and a beef option in our burritos.” This type of menu reengineering is tracking wider societal trends: in our survey, 12% of UK adults said they eat a flexitarian diet; i.e. they primarily follow a vegetarian diet but occasionally eat meat.

Shift from meat alternatives to more plants, better meat

Demand for meat alternatives that seek to replicate the taste and texture of meat has cooled amid the ultra-processed foods debate. But experts say this has left space for composite products like blended burgers made with real vegetables to make their mark, as well as a renewed focus on quality and taste.

“What we’re seeing is a bit more nuanced view of what the ‘more plants, better meat’ conversation looks like,” says Juliane Caillouette

FOOTPRINT VYPR INSIGHT



worry about the health impacts of highly processed plant-based products

Noble, managing director of The Sustainable Restaurant Association.

This speaks to the broader point that sustainable diets must be healthy as well as better for the planet, and businesses need to find ways to help customers eat both nutritiously and sustainably. “It’s not about going vegan or vegetarian; it’s about having a balanced diet but gradually increasing the amount of plants and plant protein,” says Katya Simmons, managing director at Nestlé Professional UK&I.

Recognise chefs as change makers

In last year’s Index, Compass Group UK & Ireland director for delivery of net-zero, Carolyn Ball, described chefs as “the new climate rock stars”. It’s clear that businesses see a key role for chefs in supporting decarbonisation through their creativity in recipe development.

“There’s an amazing role for chefs as change makers,” says Verity Lawson, group head of sustainability at SSP. “Chefs are often the ones who are really driving and influencing food trends.”

Training and inspiring chefs can be more impactful than interventions that put the onus on customers to make sustainable choices. “It’s good to give the consumer the information – for example, through carbon labelling – but I don’t think your only lever should be to try to place the responsibility on the customer to change,” says Lawson. “People eat what is made available and made

appealing to them: something that just looks like a really great, tasty dish on the menu.”

This chimes with insight published by the World Resources Institute (WRI),¹⁶ which identified training chefs to prepare appealing plant-rich dishes as one of 18 priorities for promoting sustainable food choices in a foodservice setting. Others included adding environmental footprint labels to menus and using indulgent language on menus to describe plant-rich dishes.

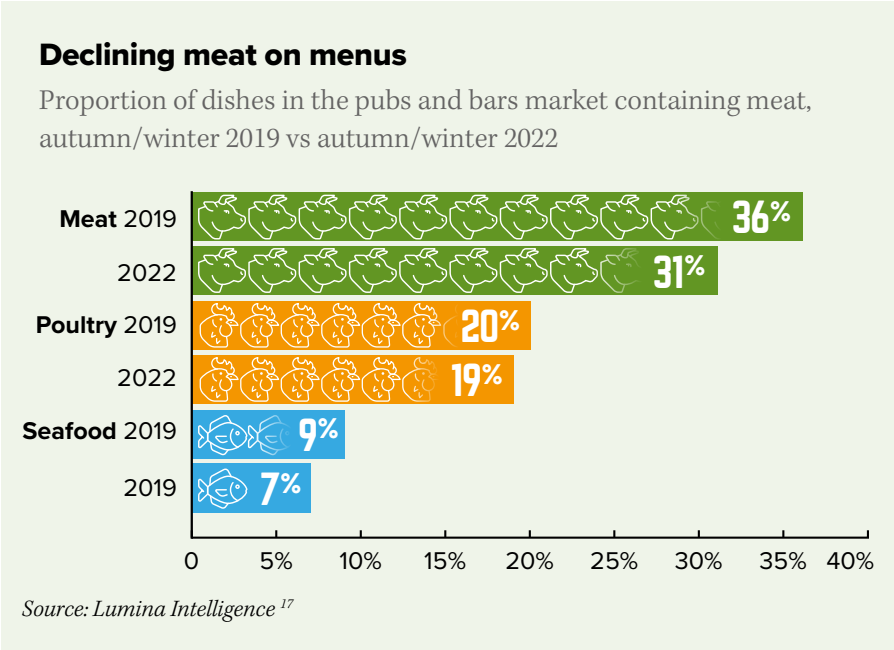
Zero Carbon Forum director Bob Gordon says member companies have reduced the carbon impact of their menus by more than 10% by harnessing a variety of levers. These include:

- changes in presentation
- product reformulation, including replacing ingredients with lower carbon alternatives
- changes to menu design, such as the positioning of items, use of language and the mix of items featured on the menu
- price (i.e. making lower carbon options lower cost)

Lower livestock’s impact

Despite the focus on creating more plant-based or plant-forward dishes, most HaFS businesses know they will be selling meat long into the future. So the question becomes how to reduce the impact of that meat.

Most of the current data used to measure meat’s carbon impact is based on averages for countries or regions. Yet there can be huge



disparities between the impact of different livestock production systems, with variables including land use, feed requirements, carcass balance and the potential to sequester carbon in soils.

“The current conversation around carbon is not as sophisticated as it’s going to be in a few years,” says Juliane Caillouette Noble of The

Sustainable Restaurant Association. She cites Wahaca: the chain has significantly reduced its need for cattle by switching its steak taco, which previously used only bavette steak, to a beef gringa taco, which can be prepared using any cut.

“That’s really important because previously we were using a miniscule portion of the cow, which meant we

were responsible for a lot of cows,” says Wahaca’s Cameron Holder. “Changing the recipe to more of a pulled beef recipe enables us to use more of the cow while improving the taste. It also gives us the commercial space to start looking at better quality meats in terms of rearing.”

What constitutes ‘better’ meat from a sustainability perspective is not straightforward. WRI found that shifting to production systems commonly associated with better meat – such as organic, pasture-raised, grass-fed, free-range and regenerative – often results in higher environmental impacts per kilogram of protein than intensively reared livestock.¹⁸

Yet current limitations in data mean the effect of different farming systems on the ability of land to sequester carbon was not taken into account in WRI’s analysis. Nor were the potential benefits of adopting regenerative practices for key indicators like soil health and biodiversity.

Work is ongoing at a farm level to fill in these data gaps, so businesses can show how switching suppliers or farming practices – and not just ingredients – can positively impact their environmental footprint across a range of indicators.

Nestlé UK&I’s head of sustainability Emma Keller says a big focus for the company is to drive forward its net-zero aims and tackle climate change: “The big lever there is working with farmers to transition towards more regenerative agricultural practices. And that’s not only important from a carbon point

of view, but massively important for nature, which is something that we know consumers are increasingly worried about.”

Among the programmes of work with which Nestlé is involved is a partnership with First Milk to help dairy farmers adopt practices such as silvopasture, where trees are planted in dairy fields. “That’s a real mindset shift for the farmers because that’s not what you usually do,” explains Keller. “Planting trees in the middle of dairy fields might be unusual for many, but it’s really positive for both carbon sequestration and for nature.” She adds that the change is also positive from an animal welfare perspective, “because the cows like to shelter from the wind, rain or sun just as much as we might do.”

Support and communicate regenerative practices

Many businesses are supporting the shift to lower-impact regenerative agriculture through their purchasing practices. Azzurri Group uses Wildfarmed flour for

“Communicating regenerative agriculture effectively is a challenge, but our approach is to showcase the positive aspects that are meaningful to our customers and can be proven – such as the way it supports nature and helps reduce carbon.”

Claudia Candiotta, head of responsible business, Azzurri Group

all dough products sold by Ask Italian, including pizza and garlic bread.¹⁹ “There was definitely a cost premium to switching, but we absorbed it because it is an incredibly important ingredient when it comes to the future sustainability of our business,” says Claudia Candiotta, head of responsible business at Azzurri. “It was a significant increase in our



costs, but it also delivered a 50% reduction in our carbon emissions.”

Despite farmers’ growing adoption of regenerative agriculture, and support from businesses that are household names, communicating its benefits to end users remains a conundrum for the entire food industry. “Consumers do not yet understand what regenerative means,” says Candiotto. “The question of how to communicate regenerative agriculture effectively is something that we are exploring. Regenerative is based on principles. It doesn’t have a universally agreed checklist. We have taken on this challenge in the best way we possibly can, and are determined to showcase the positive aspects of regenerative farming for our customers.”

An argument at the heart of the regenerative agriculture movement is whether it should have a tangible set of outcomes or be treated as an overarching ethos. “I am enthused by the potential of regenerative farming and can see its potential to be a scalable solution,” explains Candiotto. “However, we are still early on in the journey and different implementations of the same regenerative principles means that, as a business, we need to build close relationships with suppliers to fully understand what processes have been implemented, and evaluate on a case-by-case basis.”

That’s where certification may play a role. Oliver Rosevear, director of sustainability at Fuller’s, says the pub group has begun to source beef from farmers covered by the

Compass’ procurement arm trials net zero pipeline

Supply chain relationships will come more closely into focus in FY24 as Compass trials a “Net Zero Pipeline” in its procurement arm, Foodbuy. This is designed to help its buyers widen the economic analyses with which they assess one product against another, alongside cost. Initially the focus is on carbon, but the caterer has acknowledged the importance of widening the scope to include indicators such as biodiversity and water use.

Foodbuy has committed to sharing a regenerative agriculture roadmap, revised target and the rationale to support it in Compass’s next iteration of its transition plan. It will draw on the Net Zero Pipeline and an ongoing partnership with the Soil Association to help inform this work.

Compass’ regenerative agriculture target – set as part of its original “Climate Promise” in 2021 – recognised the role regenerative agriculture can play in the food industry’s overall transition. Since then, the caterer has transparently communicated and raised awareness of the challenges in accurately modelling the impact and scalability of this target, given the complexity and political economy of food production in crowded islands such as UK&I, and the expected global increased demand of 30-60% by mid-century.

“We need better data and better definitions, so our modelling is anchored in the specifics of our supply chain and current commercial realities; and so we arrive at a practical approach that isn’t overly simplistic,” comments director for delivery of net-zero at Compass Group UK & Ireland, Carolyn Ball

Grassroots Farming collective,²⁰ which has developed standards in tune with regenerative concepts such as allowing the cattle to graze on native grasses (avoiding soy-based feeds), improving soil health, creating new habitats, using livestock within arable rotations, encouraging biodiversity and minimising the use of chemicals and pesticides.

Moves to capture primary data from farms – and standardise it for measurement and communications

– are ongoing through initiatives like the Global Farm Metric²¹ and the Soil Association’s Exchange programme.²²

And moves are also afoot to look beyond carbon when labelling products’ environmental impacts. IGD’s attempt to develop a harmonised label for the UK uses a lifecycle assessment (LCA)-based approach that covers climate impacts, water use, water quality and land use.

3 Attracting and retaining clients and consumers

Generally, our customers show interest in how we work to reduce impacts, whether that's ordering dishes that positively help to reduce food waste or asking our team about sustainability."

Andrea Zick, sustainability forum lead and PA to GM at OXO Tower Restaurant, Bar & Brasserie

FOOTPRINT VYPR INSIGHT



would choose a place to eat because its ethics
▲23% in 2023
▲28% in 2022

The need-to-know insights for 2024-25:

- join the carbon labelling revolution
- understand customer choice motivators
- keep customer cost sensitivity in mind
- focus on low-impact options
- share green claims carefully

Join the carbon labelling revolution

FOOTPRINT VYPR INSIGHT



choose a venue whose signage displays a commitment to reducing CO₂e over one that doesn't
▲35% in 2023
▼45% in 2022

Consumer thirst for information on the sustainability credentials of businesses and their products shows no sign of being quenched. Our research indicates that close to half would plumb for a venue over an identical one if it advertised its carbon reduction commitments. And carbon or eco-labels that reveal the impact of dishes and ingredients are increasingly becoming standard across the sector.

Aramark uses carbon footprinting data supplied by Nutritics to communicate the environmental impact of meals. UK & global offshore head of ESG Gina Camfield says this is "really beneficial in helping people to choose lower carbon options".

"Virtually every HaFS operator

of a certain size is getting on board with carbon labelling," notes Julie Owst, head of sustainability at Bidfood. She adds that consumer demand for information on seasonality and food provenance – including local sourcing, and interest in B-Corp certification for suppliers – is also growing.

Even wholesale businesses that are not consumer-facing are working behind the scenes to ensure they can provide customers with information about their products' impact. Bidfood has engaged Carbon Cloud to calculate carbon data for its product range: not just to help inform customer purchasing decisions, but also as a tool for engaging suppliers in decarbonising. It's a dynamic tool, focused on the constant improvement in data quality. Sysco GB has collaborated with food data management specialist Nutritics to make a carbon measurement and labelling tool available to its customers via subsidiary Brakes.

Contract caterers are under growing pressure to be on top of environmental data. "There are reports that we have to comply with legally, but our clients are also requesting individual reports," says Camfield. "That can be tricky, because the time invested in pulling the data and collating those reports is significant."

"It's really challenging," agrees Mike Hanson, director of sustainable business, WSH, "even for a business as mature in ESG data-collecting and reporting as WSH. Hopefully as the

standardisation of reporting and measurement systems increases, and IT solutions evolve and become integrated with existing company systems, it will become easier and more automated to track not just overarching company impacts, but also the impacts from specific sites and client portfolios. Because it's this level of granular data that our clients are requesting."

Just Eat delivers carbon labels

Just Eat stepped up its sustainability communications by trialling carbon labelling on meals delivered to corporate clients in September 2023.

The pilot involved 10 restaurants, over 12 weeks. It followed research with 127 workers in London that showed nearly half would consider the environmental impact of the food they ordered for the office.

The food delivery platform previously ran a 12-week carbon labelling pilot in 2023 for its consumer-facing business. The aim was to show companies how they can make climate-conscious choices with food for employees, and help restaurants better understand their environmental impacts.

Understand customer choice motivators

Customers' motivations are varied – and, at times, can appear conflicting.

Thirty-two per cent of the UK adults we surveyed said they'd chosen a place to eat specifically because of its ethics – up nearly 10% from 2023, and 4% higher than in 2022. Yet a further 32% said a desire to treat themselves meant they parked environmental or health concerns when choosing what to eat.

"For the majority of guests coming to our restaurant, we don't believe the choice is driven solely by sustainability just yet," says Andrea Zick, sustainability forum lead and PA to GM at OXO Tower Restaurant, Bar & Brasserie. "The decisions

people take when they're eating out for leisure can be different to those taken when booking a venue for business, when the values of the restaurant might need to align with theirs."

However, a significant proportion of diners expect HaFS brands to do the right thing. Around 30% of UK adults say they expect cafés, restaurants and fast-food chains to reduce the environmental impacts of their food, and to support and promote sustainable diets.

"Although some guests might not challenge us on sustainability," observes Zick, "they expect us to be doing everything we can to help make a positive impact."

"People expect delicious food, and they want to be treated," agrees Mike Hanson of WSH, "and they



don't want to worry about issues like climate impact or animal welfare. They just want you to do the right thing behind the scenes. This means it's increasingly important to ensure customers understand you are a brand they can trust to make the food they enjoy as sustainable as possible."

Fuller's director of sustainability Oliver Rosevear agrees that consumers are trusting brands to take care of environmental impact. "Guest want to come out and enjoy their experience in our venues and leave behind the stresses of modern life," he suggests. That's a consistent areas of focus [for us]: how do we keep on the trajectory for net zero while still allowing the consumer to indulge and have a great experience?"

Keep customer cost sensitivity in mind

The public's purchasing decisions, believes UKHospitality CEO Kate Nicholls, are influenced by the cost of living crisis, meaning they are much more price-conscious. This is backed by our research, in which 31% of UK adults cite cost as the biggest consideration when eating out. "Consumers will always say that they want the healthy choice," observes Nicholls. "They want the environmentally friendly food, [but] when you go into a recessionary period or a cost of living crisis, often that becomes secondary to the customer in their concerns."

"Operators have looked really carefully at their menus," she suggests. "Can you streamline? Can you engineer menus to mean they're

less costly? It might mean that they take less skill to produce and you don't need as many workers, but intense pressure around cost means that you're looking at your menu like never before. In some respects, that is about cooking from scratch and moving away from processed foods, or moving towards central kitchens. But you've also seen a lot of moves towards localised supply chains."

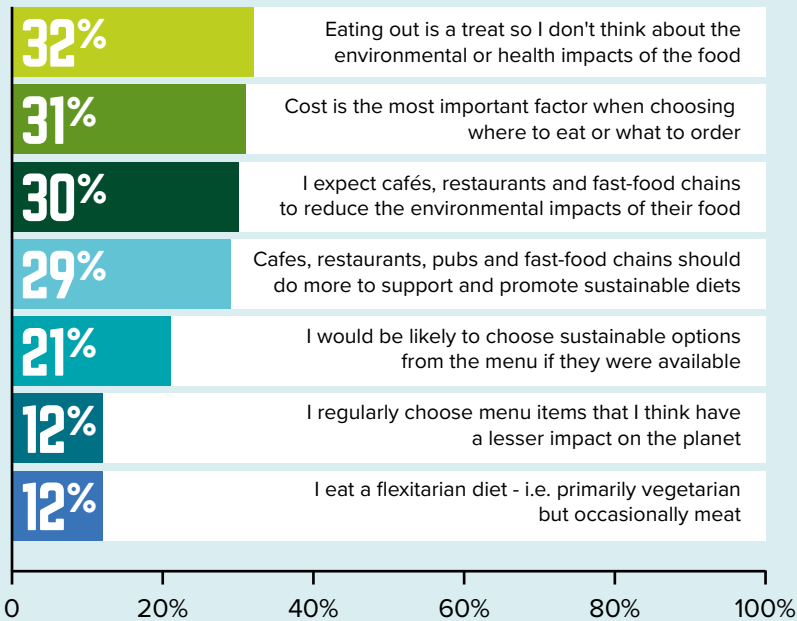
Focus on low impact options

FOOTPRINT VYPR INSIGHT



use social media to check restaurants' and venues' eco-credentials = to 2023

FOOTPRINT VYPR INSIGHT



With nearly half of UK adults using social media to check eco-credentials, marketing needs to focus on promoting sustainability efforts and choices. But there are barriers to doing so – including the fact that meat-related marketing often gets good results. Andrea Zick notes that an Oxo Tower Instagram video of a chef preparing a beef fillet achieved one of the highest levels of engagement they had seen. So, "with all content we put out, we highlight the produce we use and the suppliers we work with to reinforce our sustainability practices in everything we do."

The restaurant tries to nudge consumers in subtle ways. It has moved to a sharing style brasserie

offer from a traditional starter-main-dessert proposition, and increased the number of dishes that are naturally plant-based. “We put wonderful plant-based dishes on the menu,” says Zick, “which are eye-catching and stand out against other main courses.”

Behavioural change techniques are increasingly being employed. Aramark nudges customers to choose healthier options based on their specific objectives. “People’s goals and motivations to eat well are all different, so we’ve started to tailor the nudges a little differently,” explains Gina Camfield, head of ESG at Aramark UK and Global Offshore. “We’ve got nudges towards gut-friendly dishes; nudges towards dishes that support exercising. We’ve got a ‘love Mediterranean’ nudge and a mindfulness nudge for recipes that are good for the mind.”

Aramark carried out surveys when it launched the nudges and found them, says Camfield, “really beneficial in helping people to make better choices that are right for them.”

Share green claims carefully

Consumers look for sustainable and ethical food options. But there is often a lack of clarity about environmental claims. “A lot of operators don’t know which badges and certification marques will have the greatest resonance with their customers,” says UKHospitality CEO Kate Nicholls. “And I don’t think customers have enough knowledge about what the signposts are to know what to go for.”



Businesses keen to communicate their green credentials must tread more carefully now that regulators are clamping down on greenwashing. The UK’s Competition and Markets Authority (CMA) and Advertising Standards Authority (ASA) have toughened their stance on green claims. Once passed into law, the UK Government’s Digital Markets, Competition and Consumer Bill will give the CMA power to fine businesses who break the rules.²³

The ASA has advised businesses to ensure their claims are transparent, truthful and substantiated in a way that fosters consumer trust and promotes genuine sustainability efforts in the foodservice sector.²⁴ Yet ‘greenhushing’ may be on the rise, because businesses are choosing to stay silent over their environmental achievements for fear of a public backlash. “Scrutiny of the sustainability claims that companies are making is positive,” says Nestlé UK&I’s head of sustainability Emma Keller. “It’s important that we are held accountable and are communicating about really impactful sustainability

initiatives that make a difference. But sometimes one of the temporary trade-offs is a little bit of greenhushing, where businesses are afraid to talk about what they’re doing, because they’re so in fear of being called out for greenwashing.

“We need to get back to that middle ground where we are communicating to help consumers make better choices: share where it has gone well and where it hasn’t, and be open and honest about that.”

Nestlé has brought together experts to form a sustainability claims committee that checks marketing activity against four checkpoints: the claim does not overstate something; is not focused on an impact that’s small compared to related activity; is not inadvertently misleading consumers; and is not unsubstantiated.

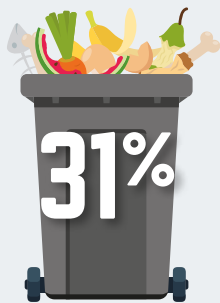
“Different brands will bring us messaging that they want to talk about,” says Keller. “We will make sure it passes those four checkpoints and help craft something that is both compliant and compelling, to inform consumers and drive behaviour change.”

4 Addressing food and packaging waste

“We’re pushing for mandatory food waste reporting for large and medium sized businesses because that’s the only way to drive systemic change.”

Claire Atkins Morris, sustainability director, Sodexo UK & Ireland

FOOTPRINT VYPR INSIGHT



would choose a place to eat because it is tackling food/plastic waste
▲26% in 2023
▲28% in 2022

Need-to-know insights for 2024-25:

FOOD WASTE

- go further in tackling food waste and push for mandatory reporting
- take redistribution to the next level
- make a virtue of sharing surplus
- embrace hot food redistribution
- innovate to reduce waste
- harness AI’s waste-saving potential

PACKAGING WASTE

- don’t let an uncertain legislative landscape derail packaging plans
- swap materials with care
- explore novel packaging solutions
- invest in reuse

FOOD WASTE

Go further in tackling food waste and push for mandatory reporting

The business case for tackling food waste remains watertight. Companies save money and can reduce emissions by purchasing less food overall and sending less to landfill.

Across the HaFS sector, certain businesses remain highly engaged with the food waste agenda. WRAP’s milestone report for its Courtauld Commitment 2030 showed that per capita food waste fell by 18.3% between 2007 and 2021 (against a 50% by 2030 target).²⁵ However, quality data – to provide standalone figures for the HaFS sector – is still lacking.

Hopes to grow industry engagement rest, in part, on a possible reversal of the government’s decision to scrap mandatory food waste reporting by large businesses. DEFRA dumped the policy under the leadership of then secretary of state Thérèse Coffey, despite widespread support for it among businesses. Her successor, Steve Barclay, subsequently withdrew the decision just days after he took office and said the government would reconsider – since when no firm decision has been communicated publicly.

“We’re pushing for mandatory reporting for large and medium-sized businesses because that’s the only way to drive systemic change,” says Sodexo UK & Ireland sustainability director Claire Atkins Morris. “I don’t see how the industry will meet the UN Sustainable Development Goal target for a 50% reduction by 2030 unless we have policy behind it.”

Take redistribution to the next level

Tangible industry-wide progress has been made in food redistribution. WRAP research published in 2023 showed that around 170,000 tonnes of surplus food were received by redistribution organisations in 2022: equivalent to 400 million meals, with a value of more than £590m.²⁶



increase in total surplus food received by redistribution organisations between 2021 and 2022



increase in surplus food redistributed by HaFS businesses between 2019 and 2022

Source: Wrap ²⁷

The HaFS sector has historically been slower than retail and manufacturing to seize opportunities to redistribute surplus food that would otherwise end up as waste. But businesses have been making up for lost time since the pandemic forced them to find outlets for food that, owing to government restrictions, could no longer be sold.

Data from the seven redistribution organisations reporting to WRAP for each year since 2019 shows an increase in surplus food distribution by HaFS businesses of over 600% between 2019 and 2022: by far the fastest growth by any sector during that period. In total, HaFS redistributed 16,542 tonnes in 2022, representing 10% of the industry-wide total.²⁸

Businesses and their charitable partners are not resting on their laurels. A new project championed by King Charles and coordinated by Fareshare plans to build on existing redistribution initiatives by creating up to eight ‘coronation food hubs’ across the UK.²⁹

Make a virtue of sharing surplus

Redistribution organisations report increased demand for partnerships from food businesses and a desire to publicise the work they do. “For a long time, many didn’t even want their names listed,” says Saasha Celestial-One, cofounder and COO of redistribution platform Olio. “They didn’t want to be tagged on social media. And now it’s totally flipped:

they want to put it on their intranet and their socials. They’ve gone from thinking food waste is a dirty secret to something that they’re proud of tackling and want to celebrate the positive impact of.”

“There’s such an increase in demand from our foodservice partners to celebrate the work we’re doing.”

Saasha Celestial-One, cofounder and COO, Olio

Embrace cooked food redistribution



Businesses are overcoming their resistance to redistributing cooked food. Sophie Leader, senior business development manager at Olio, explains that its redistribution model is governed by food safety management that is audited by its primary authority, meaning the sharing app is able to redistribute cooked food prepared on-site.

However, convincing businesses that they have nothing to fear from redistributing surplus hot food has historically been challenging. Leader says she takes time to explain “why what they’re doing isn’t going to be detrimental to anybody’s reputation and why there’s a virtually non-existent risk of food safety incidents”.

Celestial-One says a critical mass of businesses actively redistributing cooked food has been key to breaking down barriers: “We’re seeing more momentum. We’re out of early-adopter territory for those businesses that were willing to be quite progressive. We’ve been doing this for a long time now [and] have an amazing track record.”

Innovate to reduce waste

Redistribution remains second to preventing waste occurring in the first place, so businesses continue to seek innovations that reduce wastage at source. Aramark is using technology to help identify elements commonly thrown away during food preparation, and publishing recipes that utilise those elements through

their ‘Wipe out waste’ initiative; for example, using coffee grounds in chocolate brownies. “We’ve also got amazing lasagne bites,” says UK & Global offshore head of ESG Gina Camfield. “Lasagne is coated in panko and deep-fried. They are absolutely amazing.”

Gamifying food waste innovation

Fuller’s upskills chefs to adapt core recipes so they use what would be waste. “We released a module on a training platform called Attensi,” explains the pub group’s director of sustainability Oliver Rosevear. “We’ve developed mini games and videos that help our teams through repetition to make small changes to their working practice which can build up to a big impact. We developed one specifically for food waste that we released to our teams during Food Waste Action Week.³⁰

“By harnessing competitiveness and offering a sustainable prize, we were able to motivate a lot of people to get on board with it.”

Harness AI’s waste-saving potential

The growing sophistication of artificial intelligence (AI) is helping businesses unlock waste reduction opportunities by drilling down into plate waste at a granular level. A key target is hotel and restaurant



buffets, where waste levels are often high. “This has really taken off in the past 12 to 18 months,” says David Jackson, director of marketing and current affairs at Winnow. “Clients come to us and say, ‘We know our customers are taking too much food or we’re serving them food that they might not like. Can you help us reduce that?’”

Winnow worked with hotel chain Hilton to minimise buffet waste by garnering insights into what was coming back uneaten on customer plates, and reengineering menus accordingly.³¹ The analysis revealed the most wasted items at breakfast included bread and pastry, fruit, egg whites, porridge, congee, sambar, shakshuka and baked beans.

The Green Breakfast campaign led to waste reductions of over 60% – calculated to be equivalent to serving more than 400,000 meals and preventing almost 726 tonnes of Co2e emissions across a year. “We

were able to pinpoint the pastry items that were coming back on plates and give those [insights] to the chefs,” says Jackson. “They then went away and reworked some of those items” – for example, by reducing the pastry and cut fruit portion sizes.

PACKAGING WASTE

Don’t let an uncertain legislative landscape derail packaging plans

Concern is mounting over a lack of legislative action to support food waste reduction. But that’s nothing compared to the frustration felt by businesses at government flip-flopping over packaging regulations.³²

The UK’s deposit return scheme (DRS) has been delayed until 2027. A unified, binary system of labelling – recycle/do not recycle – will not now

come into effect until April 1, 2027.

Under recently published regulations on extended producer responsibility (EPR), producers will accrue fees for the management of their packaging from April 2025, with fee modulation (where producers are charged less for products with better environmental credentials) being introduced from 2026. However, a mandatory takeback scheme for single-use cups has been omitted from the regulations.

By March 31, 2025, businesses and nondomestic premises (except firms with fewer than 10 staff) will be required to recycle all recyclable waste: metal, glass, plastic, paper, card and food. Collections of plastic film begin by March 31, 2027.

Lack of certainty about the policy landscape makes devising a coherent packaging strategy complex. “We are seeing more options around reuse in the market place,” says Justin Turquet, director of sustainability at Bunzl Catering & Hospitality, “and people want to understand more about how different reuse systems work and in which settings they can be implemented effectively and successfully.”

Swap materials with care

Where single-use materials are still considered, paper has emerged as a popular alternative to plastic. However, it comes with its own challenges – especially the need to add plastic barrier coatings to paper-based cups and boxes. This can be problematic for recyclers.

Some brands have faced criticism for making material switches for

which the sustainability claims do not appear to stack up. However, says Turquet, “We’re seeing more awareness of the dangers of greenwashing, which is really good to see, and I think that will continue.

“Generally, the packaging industry will continue to be upfront about what it’s offering, but we’ll be clearer about the definitions and the terms being used.”

Explore novel packaging solutions



There is broad consensus that relying on plastic packaging for foodservice is no longer viable, given the widely reported issues with waste and pollution. And there is no shortage of innovative alternatives, many of which use natural materials rather than fossil-fuel-based chemicals. The question is whether such novel materials are scalable in current models.

Notpla replaces problematic plastic with biodegradable seaweed, using existing paper-coating and recycling infrastructure, according

to Pierre-Yves Paslier, co-CEO and cofounder of the green technology start-up. This means it can scale rapidly. Notpla has agreed a partnership with Compass Group UK and Ireland’s sports and entertainment venue business Levy UK & Ireland. This will see the caterer migrate 75 million items of food to seaweed-based biodegradable packaging over the next three years at sites including the Kia Oval, Wimbledon and Tottenham Hotspur Stadium.

With regulators across Europe increasingly looking to restrict and/or tax single-use plastic packaging, Paslier says businesses such as Compass are looking to “future-proof” disposable single-use packaging.

Invest in reuse

Reusable packaging is gaining traction and proving popular with consumers. And there is growing evidence that reuse schemes can work when executed well: 95% return rates have been achieved in

Nestle seeks answers to plastic conundrum

Nestlé is navigating the challenge of reducing its use of plastic while maintaining product integrity and freshness.

“We are continually looking at the most up-to-date science,” says Nestlé UK&I’s head of sustainability Emma Keller. The company’s dedicated institute for packaging science researches breakthrough solutions, “whether it’s novel materials like seaweed, algae or mushroom, or moves to paper-based materials, we are looking at how we might utilise these packaging materials while keeping our products safe and avoiding food waste.”

The business is also exploring the next evolution in plastic solutions: “How do we move from multi layered laminates – things that are multiple layers of mixed materials – to mono materials, a single type of material that can be much more easily recycled? How do we reduce the amount of plastic we use so we’re carrying less weight but the product doesn’t get damaged? And how do we look at the future of things like compostability?”

diverse settings from KFC, Bupa’s offices and Goodwood to festivals, hospitals and cafés. Life cycle analysis has shown that reuse can reduce environmental impacts in as little as five uses compared to single-use, can be cost-efficient and can even save money.

Paul Anderson, managing director of Meiko UK, says the growth in reusable packaging is mostly coming from operators of stadiums or outdoor festivals, particularly for pint glasses, whereas quick-service restaurants remain “inquisitive”. There is also growth, in pubs and bars, in refillable solutions for water, premium tonics and certain wines and spirits. “People like ecoSPIRITS are coming into the market,” says Oliver Rosevear of Fuller’s. “So rather than having a 70cl bottle, you’re moving to a 4.5 litre refillable

container that will hopefully reduce the amount of glass you’re producing on-site and therefore reduce your impact.”

Reusables work well in certain situations. In others, disposables might be better for the environment

Consumers positive about reusables

Research for Footprint’s Can a Cup Save the Planet? report found that 48% of people want restaurants and takeaways to take responsibility for providing convenient reusable packaging. One in five would use a particular restaurant or takeaway if it offered reusable packaging.³³

if they are disposed of responsibly. Return rates are a key variable.

Bunzl has launched its own range of reusable packaging and, with the University of Exeter, is researching reusable and disposable packaging. The results are due to be published in 2024, with the aim of demonstrating which formats best suit different environments.

Customers keen to reduce single use

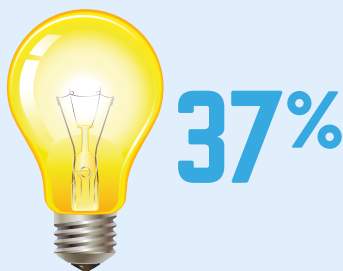
Brita Vivreau surveyed 2,000 UK consumers to gauge their expectations of hospitality establishments.

- 75% would gladly use a water refill station in a hospitality setting
- 61% do what they can in their everyday lives to reduce single use plastic
- 53% choose a café, pub or restaurant based on its plastic waste reduction

Source: Brita Vivreau ³⁴

5 Saving energy and protecting natural resources

FOOTPRINT VYPR INSIGHT



would stop using a restaurant, pub or café if they thought it was wasting energy
▲28% in 2023

The need-to-know insights for 2024-25:

- prioritise energy efficiency and electrification
- recognise biodiversity as an urgent issue
- take water scarcity seriously

Prioritise energy efficiency and electrification

Despite a significant focus on value chain carbon emissions during the past twelve months (as detailed in the **Strengthening strategy, culture and the supply chain** and **Delivering sustainable diets**), businesses have not lost sight of the importance of reducing their own emissions. This is driven by sustainability and cost concerns.

UKHospitality CEO Kate Nicholls notices an increased focus on energy use and energy efficiency among operators, “because it has been such a high-cost area.” Our research also shows that, with over a third of customers prepared to remove their custom from wasteful establishments, there is a

reputational risk for brands.

Pub group Fuller’s has been “very pushy with our energy reduction targets”, according to director of sustainability Oliver Rosevear. “We’ve made good progress in reducing the energy we use, whether it’s heating the pubs or running the kitchens.”

A key focus has been on transitioning from gas to electric kitchens; something for which, says Rosevear, “the whole business case has transformed.” However, progress has been hampered by a lack of access to electricity from the UK grid. “That’s the biggest issue that most people are facing in terms of transitioning to more electrified pubs,” explains Rosevear. “We’re not just talking about rural areas. We’re talking about central London, where we’re being asked to put massive substations into our buildings.”

“We’ve made good progress reducing the amount of energy we use, from heating the pub to running the kitchens.”

Oliver Rosevear, director of sustainability, Fuller’s

The average London property does not have a lot of space to put a substation into.”

Paul Anderson, managing director of Meiko UK, agrees that converting from gas to electric is a huge issue for the HaFS sector, and adds that efficient use of resources

remains a priority: “Whatever you buy, whatever type of equipment you have, you’ve got to try and use a lot less of it than you originally needed: less power, less water, less chemicals down the drain. You have to tick all of those boxes.”

“You haven’t got access to free water. You pay for it all the time, no matter how much has dropped from the sky.”

Paul Anderson, managing director, Meiko UK

Anderson believes it would be for helpful if the government were to offer incentives for people to buy energy-efficient equipment, in the same way it did for refrigeration. And businesses are being encouraged to embrace circularity for old equipment and to extend its life via reuse organisations like Ramco. “Instead of sending surplus items to landfill, fully functioning but unwanted items could get a new lease of life elsewhere,” Paul Fieldhouse, food service business development consultant for Ramco, told *Public Sector Catering*.³⁵

Recognise biodiversity as an urgent issue

Looking beyond carbon (see **Strengthening strategy, culture and the supply chain**), interest is growing in the urgent need to tackle biodiversity loss caused by the food system.



Businesses such as Nestlé and Sodexo have joined 17 others in committing to set science-based targets for nature, which go beyond climate action by providing solutions that reduce the risk of nature loss in four key areas: freshwater, biodiversity, land and oceans. “That is helping us to understand the different pressures on the natural world of things like

land use and water pollution,” says Claire Atkins Morris, Sodexo UK & Ireland sustainability director. For the next iteration of its Better Tomorrow sustainability plan, Sodexo will build on the targets already in place for deforestation-linked commodities – “so biodiversity gets embedded into everything we do.”

Research points to plants as biodiversity fix

Growing evidence points to the role of dietary change in supporting biodiversity. Analysis by the Green Alliance think-tank found that shifting diets to proteins such as cultured chicken and animal-free cheese would free up land for natural restoration and mitigate climate change.³⁶ That in turn would help the UK meet its climate and biodiversity restoration targets. A study published in the *Plos One* journal assessed the biodiversity impacts of popular dishes by calculating the effect on species richness of producing certain ingredients.³⁷ The footprints of dishes containing meat were generally found to be significantly higher than those of vegetarian and vegan dishes. Dishes with beef as the main ingredient – such as chilli con carne and beef tartare – were among those with the largest footprint, while starchy dishes comprising potato and wheat – such as mantou, a Chinese steamed bun – were among the least impactful.

Take water scarcity seriously

The UK has suffered one of the wettest winters on record. But water security is shooting up the sustainability agenda, amid frequent drought in the UK and key food-producing regions such as southern Europe. Businesses are taking an ever keener interest in how to minimise their operational water use – for example, by following ‘good housekeeping’ protocols such as turning off taps, fixing leaks and encouraging efficient behaviour. Cost, as well as sustainability, is a key driver.

Businesses also face disruption to supplies from failed harvests in countries experiencing high levels of drought. Juliane Caillouette Noble, managing director of The Sustainable Restaurant Association, says water stress and scarcity are “massively impacting supply chains” – most acutely in Spain, a key source of the UK’s fruit and vegetables – and hence are “rapidly climbing up the agenda of hospitality businesses”. Yet campaigners feel business engagement is not nearly strong enough. WWF’s 2023 report *High cost of cheap water* argued there has been persistent neglect of the national and global significance of freshwater ecosystems by businesses, governments and even individuals.³⁸ In a progress report for its water roadmap – a key strand of the Courtauld Commitment 2030 – WRAP revealed that just 60 businesses, including a mere six from HaFS, have committed to measure water risk in their operations and

supply chains, identify hot spots, set water-related targets and report on progress, as is required of roadmap signatories.³⁹

Industry insiders acknowledge there is an urgency to address this before water-stress-related issues escalate further. Carolyn Ball, Compass Group UK & Ireland’s director for delivery of net-zero, expects to see a “greater focus on water as businesses understand the materiality with which their organisations need to consider it, as part of their long-term, wider strategy”.

Compass itself is working to identify the most water-intensive links in the supply chain and plan possible interventions including via collaborations. So far, it has analysed 40,700 stock-keeping units, from which it has identified 13 commodities with the highest water impact. The significance of this data is underlined by research showing seven out of 17 regions in England are set to experience severe water stress by 2030.⁴⁰

Compass has agreed to co-fund, with retailers and suppliers, a WRAP project on water stewardship

in East Anglia – a key sourcing area for Compass’s suppliers. Led by the Norfolk Rivers Trust, the project will work with pig and poultry farmers and the local agriculture sector to deliver practical on-farm measures that improve water retention, reduce runoff, protect soil, enhance biodiversity and improve the resilience of the water environment.

Meanwhile, caterer CH&Co is co-funding a project in southern Spain, where more than half of the water bodies do not meet ‘good’ ecological status, as defined by the EU.



6 Encouraging creativity, boosting inclusivity and fostering wellbeing

“Mental health support is the biggest concern for the industry in relation to staff retention.”

Kate Nicholls, CEO, UKHospitality

FOOTPRINT VYPR INSIGHT



say doing the right thing for say
doing the right thing for people
and the planet is a priority
quality in an employer
▲29% in 2023
▼35% in 2022

The need-to-know insights for 2024-25:

- address talent and skills shortages
- take action on neurodiversity
- use recruitment to boost representation
- keep mental health top of mind
- invest to attract young people
- target marginalised groups for employment
- focus on upskilling in sustainability



Address talent and skills shortages

Hospitality vacancies remain stubbornly above pre-pandemic levels, with little positive movement. There were 107,000 vacancies in the quarter to April 2024, according to the Office for National Statistics – 15% higher than pre-pandemic levels of 93,000.⁴¹

“It’s not something we can solve by ourselves,” says Katya Simmons, managing director at Nestlé UK&I. “One of the ways to make the whole system and industry more sustainable is to have young talent with ideas come and flourish here, but unfortunately the industry doesn’t have a great image.”

To change that image and encourage young people to consider a career in hospitality, industry leaders united for a programme of school visits last year. Compass Group UK & Ireland, Elinor, Punch Pubs, Sodexo UK & Ireland, Nestlé Professional, UKHospitality

and Springboard participated. This marked the start of a major recruitment drive by the Choose Hospitality Pledge – cofounded by Nestlé Professional, Choose Hospitality and Springboard CareerScope – that promotes the many career pathways in the HaFS sector.⁴²

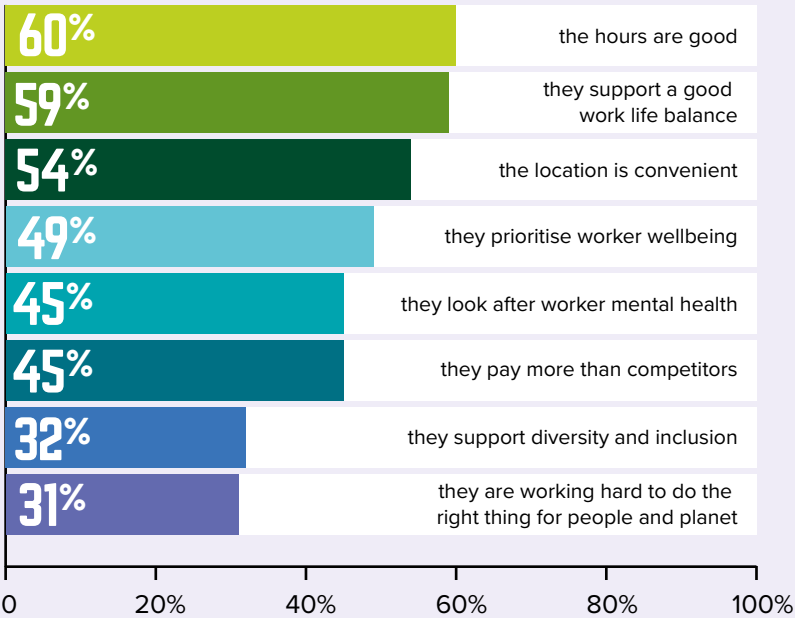
Take action on neurodiversity

A notable trend is for businesses to recognise and act on neurodiversity in the workplace – an acknowledgement of the fact that neurodiverse colleagues often have particular and distinct needs.

This can involve making practical changes to the work environment and being willing to adapt accepted ways of working. Verity Lawson, group head of sustainability at SSP, notes that simple adaptations can make a big difference, such as adapting hot-desking policies to accommodate employees who may

FOOTPRINT VYPR INSIGHT

What qualities matter most to you in an employer?



feel more comfortable with a fixed workspace.

Oliver Rosevear at Fuller’s says the pub group is working on the employability of marginalised groups, with the aim of helping people see hospitality as a genuine career option: “We’ve developed a guide around intellectual disabilities, and how you can take people with autism into work and support them through that process. We’ve also done a lot of work with Rest Less⁴³ on bringing over-55s into second careers.”

Use recruitment to boost representation

Our interviewees pointed to the importance of recruitment in

opening the industry to more portions of society, including the neurodiverse (see above), older people and marginalised groups, such as refugees.

It’s also important to promote diversity and inclusion (D&I). “There’s been a lot of focus on setting targets for women in senior management,” says Lawson. “Now it’s moving to the layers below, and thinking about inclusive recruitment, and succession and development programmes – bringing people up through the organisation.”

Incorporating DE&I (diversity, equity and inclusion) goals into executive remuneration is another way of ensuring targets are met.

Mind the pay gap

Last year, race equality think-tank the Runnymede Trust, and ShareAction, a charity campaigning for responsible investment, called on the government to introduce mandatory reporting on the ethnicity pay gap for companies who employ over 250 employees – a move that would align ethnicity with existing disclosure requirements for gender pay.⁴⁴ They also want to see employers be required to publish an action plan to combat disparities, with the aim of ending “deep-rooted inequality in pay” and boosting the UK economy.

Hospitality has among the highest proportions of Black and minority ethnic workers of any industry sector, but representation tends to be skewed towards low-paid roles.

HaFS businesses including Sodexo and Compass have kept ahead of the regulatory curve by voluntarily publishing information on their ethnicity pay gaps. However, only 18 FTSE 100 companies currently voluntarily report their pay gap.

“Mandatory transparency,” says Kohinoor Choudhury, senior campaigns officer at ShareAction, “is the only way to begin to fix this.”

Sodexo UK & Ireland sustainability director Claire Atkins Morris says long-term incentives for senior management are dependent on meeting DE&I targets for gender, as part of a plan to ensure strong representation across Sodexo’s territories. “We’re driven by data to help us understand how we’re providing a more inclusive environment for these underrepresented groups,” she notes.

Recruiting refugees

Helping to fill staff shortages while supporting integration and independence, the Hospitality Skills Academy, Westminster Kingsway, is working with the Catch22 charity to guide refugees in London into work.

Keep mental health top of mind



As HaFS struggles with recruiting the numbers they need, a greater focus is being placed on supporting current employees with their mental health and wellbeing.

“Mental health support is the biggest issue that people are concerned about in terms of staff retention,” says Kate Nicholls, CEO of UKHospitality. “Over the past year, we’ve seen the Hoteliers Charter⁴⁵ and Hospitality Wellbeing and Development Promise⁴⁶ launched. You’ve had employee support helplines from the two benevolent charities, Hospitality Action and LTC (Licenced Trade Charity). It’s a key focus.”

Nicholls adds that employers are also focusing on how they can reduce stress in the workplace by, for example, offering more flexible working hours and shift patterns; giving people longer advance notice of shifts; and renewing the focus on training and professional development.

Mental health is a priority at Aramark, according to UK & global offshore head of ESG Gina Camfield. The company’s ‘Take 15’ campaign encourages staff and customers to take a 15-minute break every day to do something they enjoy. “Whether that’s grabbing a coffee, reading or doing some mindfulness,” says Camfield, “booster breaks have a positive impact on people’s stress levels, on their productivity and on their creativity.” A wellbeing survey carried out by Aramark found that staff who regularly ‘Take 15’ report higher levels of optimism and happiness in the workplace.

Fuller’s, meanwhile, has been working on awareness of menopause, according to its director of sustainability Oliver Rosevear.

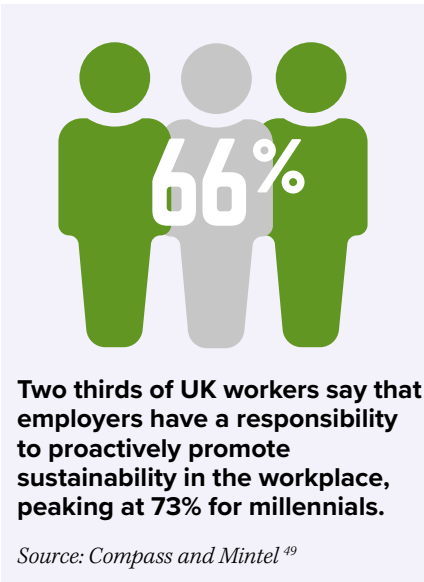
Invest to attract young people

Young people’s career choices are heavily influenced by an employer’s approach to health and wellbeing. “What we hear over and over again is that young people are much more likely to vocalise their concerns or their demands – what they want from their employer – than a generation ago,” says Juliane Caillouette Noble, managing director of The Sustainable Restaurant Association. “Employees in hospitality are speaking up more about their right to be safe and taken care of at work.”

Genuine commitment to the environment and sustainability is another critical aspect of retention,



especially where young people are concerned, according to Justin Turquet, director of sustainability at Bunzl Catering & Hospitality: “If they walk into a business and there isn’t a wellbeing programme or a sustainability programme, it is going to put them off.”



Focus on upskilling in sustainability

There is a focus on improving sustainability literacy and skills in the HaFS sector. Director for delivery of net-zero Carolyn Ball says Compass Group UK & Ireland partners with organisations such

Sustainability holds the key to talent

Better sustainability credentials and communication could hold the key for HaFS to attract staff, reduce turnover and increase retention, according to research. A report from technology provider Nutritics, and hospitality data and insights consultancy CGA by NIQ, found that competitive salaries, recognition and job satisfaction are key motivators for employees to consider staying in a role, but almost all those surveyed (94%) said that a company’s commitment to social and environmental responsibility is a significant factor when deciding where to work.⁴⁷ Fifty per cent have chosen one job over another partly because the company was more sustainable.

These attributes can also play a role in attracting customers – if they are publicised. A survey published in 2023 by UKHospitality and CGA by NIQ found that almost two-thirds (64%) of customers said a venue’s equity, diversity and inclusion (EDI) policy is important to them.⁴⁸ However only a third said they see venues advertise their work on EDI and accessibility.

as the Future Food Movement to improve skills and wellbeing: “Upskilling a diverse, 50,000-strong workforce, across multiple locations, so they have access to the tools and information that can help strengthen our resilience and embed Compass’s sustainability focus is critical to our success and to upholding the values of the communities and clients we want to support.”

Andrea Zick, PA to the GM at OXO Tower Restaurant, Bar and Brasserie, highlights the need to help people understand how to do effective ESG reporting, given the growing demands for transparency being placed on businesses: “It requires internal upskilling, because it’s still a relatively new topic. Many businesses are in the process of recruiting specialists, or training people who are keen on moving into this area, but it isn’t yet mainstream.”

With pressure growing to publish detailed climate transition plans and report against other key metrics, the mainstreaming of sustainability reporting is a trend to keep a close eye on.

“We still have a shortage of talent coming into the hospitality industry – it’s something we can only solve together.”

Katya Simmons, managing director, Nestlé UK&I

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.

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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 2024 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.

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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 May 2024 garnering more than 1000 responses per yes/no question, and over 500 responses per product comparison question.



Vypr is a leading predictive consumer intelligence platform that combines research into behavioural science with a well-segmented consumer panel. Vypr works with retailers including The Co-op Food and Starbucks, brands like Weetabix and Müller, and large manufacturing groups such as Cranswick PLC and 2 Sisters Food Group.

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