



FOOD-TO-GO. GOOD TO GO?

FROM THROWAWAY TO REUSE, TURNING
THE TIDE ON POINTLESS PACKAGING IN
THE FOOD-TO-GO SECTOR



CONTENTS



IS FOOD-TO-GO REALLY GOOD TO GO?

Cafés, fast-food outlets and coffee chains up and down the country are struggling. Earlier this year we saw one, Eat, close for good. The covid-19 public health crisis has put unprecedented pressure on their business models. At the same time, the food-to-go sector faces growing public and legislative pressure to tackle their part of the growing plastic pollution crisis.

When City to Sea, with our knowledge partner Eunomia, undertook an assessment of fast-food outlets to see how the sector was performing when it comes to single-use packaging and promoting reuse systems, we, like others, had no way of foreseeing this public health crisis. Since we carried out this research, the arrival of covid-19 has undoubtedly shaken the world and changed the retail landscape significantly.

With the industry now sandwiched between this public health and environmental crisis, we believe the roadmap outlined in this report is more important than ever. While some outlets have regrettably reversed their move towards reusables, others have doubled down on our shared vision of a refill revolution. This report fights back against the unfounded fearmongering, spread by the plastics industry, that leads to unscientific bans on reusable products. Instead it highlights the opportunities for a sector shaken to its core to build back better.

Early in lockdown we spotted this worrying trend and launched our Contactless Coffee campaign, providing fast-food outlets with simple advice on how to offer takeaway drinks in a reusable cup safely and protect our planet. But we soon realised we needed to do more to support businesses move away from the old habits of single-use and to illustrate to them how reuse can, and indeed must, be at the heart of their new business case. That's why I established REPEAT – a cross sector taskforce passionate about reuse being introduced in a safe and sustainable way.

The global pandemic has overwhelmingly demonstrated that people want to live more sustainably. But people need help to turn their good intentions into reality. This report provides the food-to-go sector with an opportunity to lead the way for the benefit of people, planet and profit.

Together we can be transparent about the barriers that stand in our way to achieving long-term, positive change and together we can share best practice and learnings to help the whole sector transition. This means mutual support but also holding each other to account. It is only through collective effort and a shared framework that a sustainable future can be imagined.

At City to Sea we focus on tackling the worst offending single-use plastic (SUP) items and develop simple, practical solutions to the complex problems that often surround them. Our aim in producing this report and roadmap is to refocus the sector on the legally enshrined Waste Hierarchy and help outlets prioritise prevention and reuse above all else.

We hope you find this report informative and urge all fast-food outlets to start the journey to a world where pointless packaging is extinct, and reuse is the new norm.

Now is the time to unite and make sure all the good progress to date does not go to waste.

Rebecca Burgess,
Chief Executive


THE PROBLEM

The food-to-go sector, which includes cafés, fast-food outlets and coffee chains, is a massive and growing source of plastic pollution in the UK and around the world.

The UK, Germany, France, Italy and Spain are among the top 13 biggest consumers of takeaway food.¹ The UK and the United States are also estimated to produce more plastic waste per person than any other major country.² In 2019 research revealed that 75% of the British public bought their lunch on the go each day, generating a mind-blowing 11 billion items of packaging waste a year – that's 276 items per person every year.³ A survey carried out by Hubbub of more than 1,200 workers found an average lunch purchase included 4 packaged items, with 76% of shoppers picking up a main item such as a boxed sandwich, 70% a packet of crisps or another snack and 65% a napkin. The majority, 64%, said they bought lunch on the go more now than they did 5 years ago.⁴

Unsurprisingly, packaging from takeaway food and drinks such as disposable coffee cups and takeaway containers are littering our streets, parks, rivers and beaches. They are now consistently in the top 10 items found on beaches in the UK and Europe. A global report in August revealed that food wrappers are now the most found items on beaches across the world, overtaking cigarettes for the first time.⁵

At the turn of the millennium there were only 5,000 coffee shops in the UK. There are now almost 26,000 outlets – from the main chains to independent coffee shops and cafés in supermarkets, service stations and retail stores – with the total market valued at more than £10bn.⁶ This growth brings a tidal wave of throwaway packaging.

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11 BILLION

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26,000 OUTLETS

in the UK, up from 5,000 20 years ago. This growth brings a tidal wave of throwaway packaging

FOOD WRAPPERS

are now the most found items on beaches across the world



“ THE COMPANIES THAT WILL ‘WIN’ OVER THE NEXT 10 YEARS WILL BE THOSE THAT FUEL THIS NEW ERA OF CONSCIOUS CONSUMPTION.

Mintel



CONSUMERS DEMAND BETTER

Consumer awareness of the plastic problem is now extremely high, with a number of surveys demonstrating the public’s increasing concern regarding plastic and packaging waste.^{7,8} 81% of respondents say sustainability and the environment are now more important to them as a result of the pandemic. The public are also willing to pay 12% more for sustainable goods and services if it helps the planet.⁹ As such, consumer pressure on brands to improve their environmental performance is likely to continue to increase, and a lack of action may soon be bad for business. Hospitality is on the frontline, in the sense that operational practices are very visible to consumers and issues such as single-use cups and straws draw scrutiny.

Mintel stated that “the companies that will ‘win’ over the next 10 years will be those that fuel this new era of conscious consumption. Tomorrow’s consumers will actively seek out environmentally responsible packaging and aggressively reward brands that help them understand what is actually better, rather than what is ‘less bad’.”¹⁰

SINGLE-USE SOLUTIONS ARE NOT THE ANSWER

To put an end to plastic pollution, we need to turn off the tap when it comes to SUPs. But reducing plastic in one area can cause problems in another totally different area. Switching to paper packaging could further impact our forests and swapping plastics

for so-called bioplastics (which can be made from crops rather than oil) brings with it a whole host of environmental issues.

In 2019, City to Sea launched guidance on bioplastics to address the growing use of this complicated alternative single-use material.¹¹ We also created our ‘Navigating disposables & reusables guide’ to help the food-to-go sector reduce the impact of single-use packaging, acknowledging that transparency is needed to help business make the right choice.¹²

A desire to reduce labour costs in the food-to-go sector often results in more disposable items being used, even for eating in, to avoid the need for clearing tables and the use of dishwashers. Yet, long-term forecasts from Eunomia, whilst speculative, present a mid-estimate EU market for bulk goods of €1.2 bn in 2030, with best case potential being significantly greater.¹³ In fact, the plastics and packaged goods sector was listed as the highest potential for circular economy growth in the short-medium term.¹⁴

Pre-covid-19, the food-to-go industry was experiencing uptake from customers on reusable cups for 1% – 5% of total sales. Whilst still marginal, behaviours were changing, with the global reusable coffee cup market anticipated to record significant growth over the next 8 years. However, since the pandemic hit the industry has started to backtrack on much of the progress made in driving an uptake of sales in reusables, with many banning reusables completely.

WHAT'S BEING DONE TO TACKLE THIS CURRENTLY?

The European Union and the UK governments have announced initiatives to target SUP products, and over 40 major food companies have signed the UK Plastics Pact, a voluntary initiative delivered by the Waste and Resources Action Programme (WRAP) that aims to create a circular economy for plastics.¹⁵

Despite the fact that the UK has left the EU, the Department for Environment, Food and Rural Affairs (DEFRA) has committed to aligning with relevant EU regulations relating to plastic and waste directives or to exceed their ambitions in some cases. As a result of covid-19, the UK government's plan to ban straws, stirrers and cotton buds in England was delayed from April to October 2020. The UK Environment Bill, intended to match and replace much of what was Brussels-originating environmental governance at the end of the Brexit Transition Period in December 2020, has also been significantly delayed. It is unclear what delays there will be on further government consultation and roll out of SUP-related policy, but clearly covid-19 will continue to affect pre-pandemic schedules.

The EU Single-Use Plastics Directive (SUPs Directive) requires member states to ban or take steps to reduce the use of a longer list of SUPs, including cutlery, balloon holders and polystyrene food and drink vessels.¹⁶

Whilst the UK government has pledged to match or exceed the ambitions of the SUPs Directive, there remains both considerable uncertainties as to the fulfilment of those commitments and considerable variation across the devolved administrations.

Wales, for example, has published plans to directly match the EU SUPs product bans by autumn 2021.¹⁷ The Welsh government's longstanding commitment to reducing waste and unnecessary plastic is outlined in its circular economy strategy, *Beyond Recycling*, which aims for a zero-waste Wales by 2050.¹⁸ And, at the time of writing, the Scottish government had just published for consultation its proposals to introduce bans matching those of the EU SUPs Directive.¹⁹

In September, the Irish government announced plans to ban some SUP products and introduced a levy on disposable cups.²⁰ The 2021 ban will include cotton buds, cutlery, plates, chopsticks and polystyrene containers. Other commitments, representing the Irish government's implementation of the EU Packaging and SUPs Directives, include a deposit return scheme (DRS) for cans and bottles, a ban on disposable cups for sit-in customers, and ambitions for "an eventual full ban" on disposable coffee cups. Additionally, retailers will be obliged to give a price reduction to consumers who use reusable cups. The plan also aims to ensure all packaging is either reusable or recyclable by 2030.

LIMITATIONS

Recent reports have claimed that the voluntary commitments by UK Plastics Pact members are not enough. The 'Breaking the Plastic Wave' report by the Pew Charitable Trust stated that the current global commitments are inadequate for the scale of the problem: "By 2040, current government and industry commitments are likely to reduce annual plastic leakage into the ocean by only 7 per cent (± 1 per cent) relative to business-as-usual plastic production."²¹

The Changing Markets Foundation's 'Talking Trash' report highlighted that UK Plastics Pact signatories had

been slow to act. The report states: "While promoters of the pact promised great ambition from its 127 signatories, a progress report from WRAP in 2019 (one year into the initiative) only provided updates on 45 of those companies – just 1 in 3. Of that small selection, only 1 in 5 had taken action on all 4 targets, and 16% had failed to move on even 1 target."²² Currently those who had not acted are not held to account.

The Changing Markets Foundation makes recommendations on how a voluntary initiative can be transformational, which include:

- Adequately holding members to account with transparent reporting.
- Enforcing the voluntary commitments and keeping the target ambitions.
- Ranking companies on their performance.
- Ensuring plastic is not replaced by other single-use materials or false unproven technologies for managing materials, e.g. chemical recycling.
- Sharing best practices with members.

BY 2040, CURRENT GOVERNMENT AND INDUSTRY COMMITMENTS ARE LIKELY TO REDUCE ANNUAL PLASTIC LEAKAGE INTO THE OCEAN BY ONLY 7 PER CENT

Pew Charitable Trust

THE INVESTIGATION

Until now, there's been limited research to understand the extent of the problem in the food-to-go sector. How much SUP is being deployed? Why? What can be done to tackle the problem? And how can we help?

City to Sea partnered with renowned environmental consultant Eunomia to investigate the use and management of SUP and packaging in the food-to-go sector. We wanted to know where the sector was currently at, what the key issues were, and what was being done to address the problem.

OUR OBJECTIVE WAS TO CREATE A ROADMAP FOR THE FUTURE AND SHARE BEST PRACTICES AND LEARNINGS TO SPEED UP THE TRANSITION FROM SINGLE-USE TOWARDS SYSTEMS OF REUSE.

Eunomia assessed the top 20 (by sales turnover data in 2018) UK high street food-to-go operators, peeling back the shiny wrapping to see how their single-use waste is generated and managed. The companies were grouped into Coffee & Sandwich Shops (Caffè Nero, Costa Coffee, Greggs, Patisserie Valerie, Pret A Manger, Starbucks, Subway), Contemporary Fast Food (Benugo, Eat, Itsu, Leon, Five Guys, Wasabi) and Traditional Fast Food (Burger King, Dixy Chicken, Chicken Cottage, KFC, McDonald's, Pepe's Piri Piri, Wimpy).

Eunomia analysed the published commitments and observed operational data on leading food-to-go operators in terms of reduction, reuse and recycling of single-use packaging and consumables. They then used these findings to benchmark sector peers, with the aim of driving competition, sharing good practice and measuring progress. Eunomia scored each company on its published and reported strategies and observed front-of-house operations. They focussed their analysis on strategies relating primarily to reduction and reuse, plus recycling, with scoring then weighted according to the Waste Hierarchy.²³

Using these findings, we've created a snapshot report and a roadmap for the future, with timed actions and targets that big chains and thousands of independents across the UK can use to reduce their SUP packaging.

The purpose of this piece of work was to benchmark the sector and give a baseline to work from and improve upon. Our intention is to repeat the project again in 2021, this time revealing the results on the individual rankings for the sector, enabling the general public to see who is leading the way and who is lagging.

Now is the time for the food-to-go sector to step forward and lead the way.

Will they? >>>

THE RESEARCH AND FINDINGS

Our research gave us a pre-pandemic snapshot of behaviours in the food-to-go sector. What we found was a great deal of variation across the sector in how SUP is used. At the time the research was completed, some businesses were taking small steps, but action was falling well short of legal requirements, environmental best practice and consumer expectations.

We appreciate that the sector faces numerous practical constraints on what can and can't be done easily. We have compiled the list below to illustrate some of these issues and the potential solutions, a number of which are already seen in some outlets.

TEN KEY FINDINGS

1. WHAT WASTE HIERARCHY?

The legally enshrined Waste Hierarchy²⁴ ranks waste management according to the EU Waste Framework Directive's ranking of the environmental impact of each level.²⁵ Top priority is given to preventing waste in the first place, then to reuse, recycling, recovery (usually waste-to-energy incineration) and finally disposal, e.g. landfill.

The waste hierarchy is not being followed across the sector in 3 main ways:

- Very little focus on prevention and reuse. Throwaway culture in the sector has not itself been discarded.
- Continued reliance on incomplete recycling management and infrastructure.
- No transparent policy in the sector, with few clear and trackable published commitments from businesses.

Only 40% of the businesses we assessed had public-facing policies or commitments online about avoiding and reducing single-use consumables (straws, stirrers, napkins, condiments, milk sachets) and packaging for fresh food and carrier bags.

GOOD PRACTICE

Pret A Manger encouraged reuse with an industry-leading 50p discount for customers using reusable cups.

Costa Coffee had a published policy on giving free tap water refills.

Caffè Nero served all sit-in drinks in reusables.

THE WASTE HEIRACHY



86%

of traditional fast-food outlets had no policies for reducing SUP front of house



2. PLASTIC POLICY PLEASE

The problem with SUP has become a hot topic for public conversation, especially since Blue Planet II was aired. But even with the influence of Sir David Attenborough, our research found that business policies aren't reflecting the public's concerns.

At the time the research was conducted:

- 83% of contemporary fast-food outlets and 86% of traditional fast-food outlets had no policies for reducing SUP front of house, such as promoting reusable cup use or replacing sauce sachets with dispensers.
- 71% of sandwich and coffee shops had no policies for reducing SUP front of house.

GOOD PRACTICE

Itsu and Costa Coffee clearly demonstrate how they are reducing SUP on their company-facing websites.

Pret A Manger has aligned its targets with the UK Plastics Pact. Please note, whilst this demonstrates intent, transparent reporting and evidence of achieving these targets remains paramount to avoid 'green-wash'.

Starbucks has audited, set targets and reported on its SUP reduction in annual reports.

3. MILK: BEYOND THE PAIL

15 of the businesses we visited served hot drinks, which means they are using huge quantities of milk and therefore SUP packaging.

20% of the businesses assessed used lower-packaging milk options, such as plastic bags, but these are non-recyclable and so still far from ideal. Plant-based milk either came in plastic or Tetra Pak.

GOOD PRACTICE

Harts Bakery in Bristol receives milk from Bruton Dairy in refillable metal urns, which sit in a fridge below the coffee machine and provide milk on demand for baristas.



ONLY 20%

of the businesses assessed used lower-packaging milk options



4. WATER WASTE

UK tap water is among the best in the world,²⁶ yet the **consumption of bottled water here has doubled over the last 15 years, with over 7 billion plastic water bottles used per year.**²⁷ Millions of these are ending up in our environment and our oceans.

Through City to Sea's Refill campaign, we've been connecting over 300,000 thirsty consumers to free drinking water for the last 5 years. We've had massive success working the high street and now have over 20,000 cafés and restaurants signed up to offer free drinking water. However, we are still seeing many businesses aggressively marketing bottled water to consumers.

Our research found:

- 7 out of 20 outlets had plastic water bottles on promotion in their meal deals, actively promoting plastic pollution.
- Only 2 of the 7 coffee shops had a refill water station. In the others, customers had to request free water.
- Only 2 businesses (Benugo and Patisserie Valerie) had a policy never to sell discounted water in single-use bottles.

GOOD PRACTICE:

8 out of 20 outlets offered free tap water as part of the Refill campaign.

Itsu, Pret A Manger, Leon, Benugo, Caffè Nero and Five Guys had refill points front of house for customers to use freely.



**ONLY
36%**

of businesses offering coffee had a cup recycling scheme in place



5. HOT DRINKS: A CUP OUT?

One of the most visible problems is disposable coffee cups. Eunomia has suggested that the UK may already use as many as 5 billion coffee cups per year.²⁸ While disposable coffee cups are technically recyclable, analysis by Footprint of data provided by the Paper Cup Recovery and Recycling Group found that only 6% are actually being recycled.²⁹ Even this depressing figure masks the fact that with rapidly growing consumption of single-use coffee cups the proportion of cups recycled must be decreasing.³⁰

There are a number of options for businesses, from in-house cup recycling schemes to reusable cup systems and offering discounts to customers for bringing their own cup or charging them for a disposable. The impact varies depending on the discount or the charge, but research from Cardiff University recommends a levy of at least 25p. The study found that the provision of free reusable alternatives combined with clear environmental messaging and a charge on disposable cups increased the use of reusable cups from 5.1% to 17.4%.³¹

Our research showed that:

- 50% of the chains that served takeaway coffee offered a discount for a reusable cup, plus one more offering loyalty points.

- Traditional fast-food businesses are lagging. None offered a discount or incentive for reusing.
- 36% of the outlets selling coffee also sold reusable cups.
- 36% of businesses offering coffee had a cup recycling system in place.
- 53% of the 15 businesses offering coffee served it in real crockery cups, but this wasn't consistent across all stores for 3 of them.

GOOD PRACTICE

Starbucks was the only one of the 7 coffee shops that charged a fee (5p) for single-use cups. However, a Cardiff University study showed that a levy of at least 25p was necessary to motivate customers to carry a reusable cup with them.³²

Boston Tea Party banned single-use cups completely, opting for an in-house deposit return scheme. So for those customers who don't have a cup with them, they offer a refundable hire scheme. Reusable cups are also available to buy at cost price.

DISCOUNTS VS CHARGES – WHICH WORKS BETTER?

DISCOUNTS

2011 Starbucks' 25p discount and £1 reusable cup – less than 2% reusable cup sales.

2015 Starbucks increased discount to 50p yet reusable sales remained at 1% – 2%.

2018 Pret A Manger and Costa Coffee followed this move but no significant increase in reusable usage.

CHARGES

In a 2018 trial with the Hubbub foundation, Starbucks applied a 5p disposable coffee cup charge across 35 stores in London. Despite the lower charge value, reusable cup rates more than doubled from 2.2% to 5.8%.



Reusable cup usage

DOUBLED

by charging for disposable ones

REJECTED 'LATTE LEVY'

250,000 people signed City to Sea's petition calling on the government to introduce a point-of-sale plastic tax on items like disposable coffee cups back in 2018. Yet UK ministers rejected calls for a 25p charge per single-use cup in the Autumn Budget, proposing a tax on plastic packaging containing less than 30% recycled content instead.

The evidence is clear that levies are effective in changing throwaway behaviour. The 5p charge on single-use plastic bags reduced use by 86% in the 7 big British supermarkets in just 3 years.

RECYCLING SCHEMES

Whilst cup recycling systems capture the waste and contribute to resource efficiency, they don't address the issue of reducing our reliance on single-use packaging. Due to the way coffee is consumed – on the go – these are ineffective at capturing the cups as they are used.

REUSABLE CUPS SCHEMES

Reusable cup schemes such as the Shrewsbury Cup have proved effective in preventing millions of hot drink cups becoming litter or ending up in the general waste bin.³³ These are now being regarded as the 'safe' reusable option, and demand grew in the US in the immediate period before the lockdown, in California and Colorado for example.³⁴ But major chains are reluctant to employ them because they're concerned about losing branding opportunities and slowing down serving speeds. Right now, it's up to conscientious customers to find a recycling point for their single-use cup or carry a reusable.



6. CUTLERY AND CROCKERY

The waste hierarchy is clear: waste avoidance should be prioritised. In this context, that means providing reusable cutlery and crockery for eat-in diners instead of disposable items. But most outlets have so far ignored this. Although members of the UK Plastics Pact recommend eliminating single-use plastic cutlery, only one of the chains visited was signed up at the time the research was conducted. And this is purely a recommendation, not a requirement.

We discovered:

- Only 20% of eat-in venues provided reusable cutlery.
- Only 25% provided reusable glasses for cold drinks. The remainder offered a combination of single-use plastic or paper cups for milkshakes and post-mix soft drinks or served the drinks in cans and bottles. These are all still single-use materials.

- 53% of the 15 businesses offering coffee served it in real crockery cups, but this wasn't consistent across all stores for 3 of them.
- 70% had disposable cutlery in one or more of their outlets. Though it wasn't clear whether these were made from conventional fossil-fuel derived plastic, conventional 'bio-plastic' made from plants, or 'compostable' / 'biodegradable' plastic made from plants or fossil fuels, they were all potentially polluting single-use items best replaced with reusables.

GOOD PRACTICE:

Wimpy and Patisserie Valerie only provide crockery and cutlery for use in-house.

7. SACHET AWAY

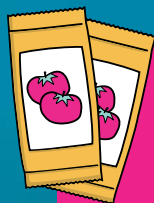
SUP sachets for things like cosmetics, washing products, ketchup and other condiments are small, lightweight and easily dropped as litter. It's estimated that globally we use 2.3 billion a day.³⁵ In 2020, 855 billion sachets are expected to be used – enough to cover the entire surface of the Earth. Yet, inexplicably, sachets were excluded from the EU Single-Use Plastics Directive and don't feature in UK government plans.

All the outlets we visited only gave out sauce sachets on request. This prevents people from grabbing more than they need and causing excess packaging waste. Some locations provided customers who were eating in with sauces in single-use open-topped pleated paper tubs.

GOOD PRACTICE:

Itsu, Wimpy and Five Guys had large dispensers or sauce bottles on the table instead of sachets.

Just Eat and Hellman's were trialling ketchup, barbeque, tartare and garlic sauces served in seaweed sachets as part of a pilot in 65 takeaway outlets in London.³⁶ Whilst we applaud efforts to remove potentially polluting SUP initiatives such as this, they still create considerable resource pressure on potentially fragile ecosystems as well as a whole new waste stream for councils to deal with. On top of that we've yet to see what impacts they could have if they escaped to pollute the environment.



855 BILLION

plastic sachets are expected to be used in 2020 – enough to cover the entire surface of the Earth.



75%

of the businesses we visited provided paper carrier bags for takeaway

8. THE LAST STRAWS

In October 2020, after a six-month delay caused by the pandemic, plastic straws were finally prohibited in England, along with plastic-stemmed cotton buds and coffee stirrers, by the UK government. Scotland implemented its own ban in 2019 and Wales plans to introduce a longer list of banned items in early 2021.

At the time our research was conducted:

- 65% of the outlets we visited had removed plastic straws.
- Burger King, Subway, KFC, Starbucks, Five Guys, Itsu and Pepe's Piri Piri still offered plastic straws, some freely available front of house.
- Other venues had paper straws or only provided a straw on request.

9. PLASTIC BAGS: PACK IT IN

75% of the businesses we visited provided paper carrier bags for takeaway. 5 businesses still used plastic bags, due to only supermarkets and large retailers being obliged to charge for single-use bags currently. This is due to be extended to all retailers but not until April 2021.

GOOD PRACTICE:

Itsu, Pret A Manger, Starbucks and Caffè Nero only provided paper bags for takeaway. Whilst these paper bags had the downside of being single-use we were encouraged that they were only given out on request.



10. RECYCLING SYSTEMS

It is appreciated that some food-to-go outlets do not undertake front-of-house recycling since this is likely to be very mixed due to improper use by customers, and contaminated with food waste. Front-of-house recycling, while not fully effective in providing a clean recycling stream, can still help to instil good customer behaviours, mirroring what is done in the home. Across the sector there was huge variation in what bins were available for customers to put their used single-use packaging in. Where there is only one bin, the most likely outcome is that these materials, whether recyclable or not, will be going for waste-to-energy incineration.

This may sound like a good solution and is frequently used by brands to justify their zero waste-to-landfill claims. However, waste-to-energy incineration is terrible for the environment³⁷ – these incinerators emit more greenhouse gases per unit of electricity generated than most fossil-fuel power stations and displace genuinely low-carbon renewable energy from the grid. They also release toxic air pollution and destroy materials that either should have been recycled at the time or otherwise could in time have been retrieved from landfills and recycled. For these



ZERO

outlets had separate food waste collection bins or separate bins for compostable packaging

reasons 'Energy Recovery' has traditionally been placed below 'Recycling' in the Waste Hierarchy and, increasingly, is becoming regarded as worse than landfill.³⁸

One of the biggest issues the food-to-go sector faces when it comes to recycling is contamination. Recyclable materials that are contaminated by food and drink are often rejected by reprocessor companies and so end up in landfill or incinerators. Reusables, on the other hand, avoid this problem entirely simply by being washed and returned to use.

What we learnt:

- Just 2 of the 18 chains that didn't provide table service offered consistent front-of-house recycling for customers to use across all outlets.
- 2 other outlets had some front-of-house recycling, but not across all their branches, with many providing just one bin for all items, which means all materials end up in waste-to-energy incineration.
- No outlets had separate food waste collection bins or separate bins for compostable packaging.

GOOD PRACTICE:

Pret A Manger offered some front-of-house mixed recycling streams for customers.

Leon appeared to use a dispersion-coated cardboard with a greaseproof paper liner, which reduces food contamination and makes the cardboard more recyclable if it goes in a recycling bin.

DON'T LET YOUR PROGRESS GO TO WASTE

With the arrival of covid-19 in spring 2020, life as we knew it changed overnight. As lockdown hit, the entire food-to-go sector shut down, with only takeaways and home deliveries keeping businesses afloat.

One of the outlets that we reviewed before the pandemic, Eat, has since closed permanently.³⁹ With pre-pandemic business concerns already present at outlets such as Patisserie Valerie,⁴⁰ along with furlough ending and Brexit looming, some in the sector are facing a challenging future.

As society scrambles to find certainty, the media has been filled with talk of 'building back better'. It sounds promising, but so far we've seen worrying backsliding on policy and business operations in the name of health and safety at outlets that were previously heading in the right direction.



FOOD-TO-GO GOES INTO REVERSE ON SINGLE-USE PLASTIC

As fears about contamination took hold, thanks to the plastics industry working hard to convince us that single-use disposable plastic is the safest option, many chains and coffee shops stopped accepting reusable cups and food containers.

Whilst they believed they were doing the right thing and protecting their staff and customers, a statement from over 120 scientists confirmed that reusables are perfectly safe to use provided basic health and safety advice is followed.⁴¹

AT THE TIME OF WRITING, THERE HAVE BEEN NO CASES OF TRANSMISSION REPORTED VIA FOOD PACKAGING, CROCKERY, CUTLERY OR REUSABLES.

IN-STORE REUSABLES

All venues that previously had sauces in pump dispensers or bottles removed them and reverted to sachets. Costa Coffee, Wimpy and Patisserie Valerie are still offering eat and drink-in service in reusable ceramic cups and cutlery. All other outlets have reverted to serving eat-in diners with SUP or paper alternatives.

IN-STORE WATER STATIONS

All venues that previously had water refill points for customers removed them.

PPE

The world is now edging towards an even bigger global plastic waste crisis due to an estimated 194 billion disposable masks and gloves being used each month.⁴² When we revisited the 20 venues in our research, the approach to PPE was mixed. Some venues have staff wearing disposable masks, some visors (which can be cleaned and reused) and some have neither if there are plastic barriers separating staff from customers. Our follow-up study in September 2020 showed that staff in some other restaurant chains were using reusable branded masks.

GETTING REUSABLES BACK ON THE MENU

Over the following months, City to Sea established REPEAT, a reuse taskforce to bring together industry experts, scientists, businesses, retailers and epidemiologists to share best practice around operating reusables during the pandemic.

We then launched **#ContactlessCoffee**, a campaign to provide practical guidance for businesses in safely accepting reusables. The campaign was picked up across the UK and internationally, resulting in hundreds of businesses accepting reusables again, including Costa Coffee and Starbucks UK. We're now calling on the remaining chains, including Pret A Manger, Caffè Nero, Greggs and McDonald's, to do the same and start accepting reusable cups, bottles and containers again.⁴³

A ROADMAP FOR CHANGE

The following pages outline our roadmap to help businesses make sure the main takeaway from their outlets is sustenance and not single-use waste.



LEGISLATIVE CONTEXT

The future context of legislative action on tackling single-use plastic depends heavily on the passage of the delayed Environment Bill and subsequent 'secondary legislation' passed by the Secretary of State under powers conferred by what will then be the Environment Act. At the time of writing, there is little as yet to demonstrate practical implementation of the commitments the UK governments have made on waste matters in England.

Much of what the devolved administrations decide will also be influenced by the UK Environment Act, not least as negotiations within and between the governments determine what is and isn't a devolved issue.⁴⁴ The Welsh Assembly has already issued stark warnings that variations on plastics standards risk disrupting internal markets with the UK.⁴⁵ For these reasons we must assume a degree of conformity across the UK and as such the rest of this section will focus on the UK Environment Bill with the proviso that policy-making and ambition already vary between the countries and are likely to continue to do so in future.

The Environment Bill devotes significant attention to Deposit Return Schemes (DRS), extended producer responsibility (EPR) obligations, charges on single-use items and measures to increase and improve recycling rates. These are all potentially useful weapons in the fight against plastic pollution. Nonetheless their effectiveness will be hampered unless they are deployed strategically in an evidence-based approach that targets plastic pollution in its entirety and focusses – in line with the waste hierarchy – on prevention and reuse.

Such targets are currently lacking in the Environment Bill. So, too, is the robust framework of duties and processes necessary to ensuring those targets and broader environmental projections are properly informed as to their social, environmental and economic impacts, and that they are properly enforced, monitored, reviewed and, where appropriate, corrected.⁴⁶



WHAT WE'RE CALLING FOR:

Just as the science and overwhelming public and corporate concern led to the passage of the Climate Change Act, so now does the plastic pollution crisis demand corresponding legislation. Businesses desperately needed the long-term certainty and evidence-based approach that the Climate Change Act provides, and they also need certainty and leadership from ministers now on plastic pollution.

For this reason, City to Sea is adding its voice to calls by an alliance of NGOs calling for plastic pollution and waste targets.⁴⁷ We urge like-minded organisations and members of parliament to call on ministers to amend the Environment Bill accordingly.

The Environment Bill and subsequent secondary legislation must target significant reductions in plastic pollution and waste. This should include:

- ▶ **An overarching long-term target** (with interim targets) to prevent further plastic pollution by 2042, in line with the government's 25-Year Environment Plan.
- ▶ **The phase out of non-essential SUPs by 2025**, with ongoing targets to eliminate non-essential single-use plastics thereafter. Research for Greenpeace suggests at least 50% of packaging SUPs can and should be sustainably removed by 2025.⁴⁸
- ▶ **Targets for the uptake of reusable products and business models** in place of single-use equivalents. Research for Greenpeace suggests at least 25% of the 50% SUPs reduction, and at least 75% of transit packaging, should be achieved by switching to reusables.⁴⁹



“ 50% OF PACKAGING SUPS CAN AND SHOULD BE SUSTAINABLY REMOVED BY 2025

Greenpeace

Other necessary improvements to the Environment Bill that directly relate to plastic pollution and the food-to-go (FTG) sector include:

- ▶ **Transparency:** Businesses should be required to calculate and report on their 'plastic packaging footprint' and targets to reduce it, following the lead of supermarket Iceland.⁵⁰ As Iceland's MD Richard Walker puts it: "Without transparent reporting, and Government enforced reduction targets, we will not be able to judge whether business actions are delivering real progress. That is why Iceland is calling on retailers and other businesses to step up and commit to publishing their total plastic packaging transparently, including both own label and branded products."
- ▶ **Prioritise prevention and reuse:** The Environment Bill, subsequent secondary legislation and the broader Resources and Waste Strategy for England must place much greater emphasis on the upper levels of the Waste Hierarchy, namely 'Prevention' and 'Reuse'. A good example would be the introduction of a ban on unnecessary single-use cups for sit-in customers. Hitherto the emphasis has been on recycling (which should be regarded as the 'least good' option) and waste-to-energy incineration, which is itself an environmentally harmful destroyer of natural resources. This historic failure to focus on waste prevention and reuse suggests the need for legislation that more explicitly and directly adheres to the Waste Hierarchy.
- ▶ **Single-use plastic charges:** These should be applied to all non-essential single-use items, regardless of material. Doing so would be in line with the Waste Hierarchy and help to prevent a simple switch from single-use plastic to single-use items made of other potentially harmful materials.
- ▶ **Extended Producer Responsibility (EPR) and Deposit Return Scheme (DRS):** These should be extended to cover the full breadth of packaging products and materials and should be designed to prioritise boosting waste prevention and reusables. Associated decisions as to tax, subsidy and infrastructure spending should also be focussed on waste prevention and reusables, moving beyond the current fixation on taxing non-recycled plastics.
- ▶ **Waste exports:** UK waste dumping on vulnerable overseas communities, allegedly for recycling, has received huge amounts of media attention, including by the BBC's War on Plastics series.⁵¹ The Environment Bill includes provisions to ban such exports to non-OECD countries, but it is unclear how much difference this would make given the UK is already committed to preventing the export of polluting plastic under the Basel Convention. To prevent harmful and illegal waste exports the government must increase funding for the Environment Agency to inspect waste shipments and refocus efforts on waste prevention and reuse.

RELEVANT UPCOMING GOVERNMENT LEGISLATION AND SECTOR INITIATIVES INCLUDE:

2021

- The Environment Act receives Royal Assent with provisions for DRS, EPR, charges and single-use items and duties on the Secretary of State to set at least one target for waste and resources
- Extension of the single-use plastic bag levy to all retailers
- Consultation on the introduction of Deposit Return Scheme in England, Wales & Northern Ireland
- Plastics Pact members' voluntary commitments to product bans partly mirroring those of the EU SUPs Directive
- EU member states begin establishing bans and reductions in line with the SUPs Directive. The deadline for transposition of the Directive into Member State law is July 2021. The UK is not bound to transpose the SUPs Directive but governments across the UK have pledged to match or exceed its ambitions

2022

- Introduction of Deposit Return Scheme in Scotland
- UK government tax on all plastic packaging containing less than 30 per cent recycled content, from April 2022

2023

- Introduction of Deposit Return Scheme in England, Wales & Northern Ireland
- UK government: revision of the Resources and Waste Strategy (2023/24)

2025

UK Plastic Pact Members commit to:

- Eliminate problematic or unnecessary single-use packaging through redesign, innovation or alternative (reuse) delivery models
- 100% of plastics packaging to be reusable, recyclable or compostable
- 70% of plastics packaging effectively recycled or composted
- 30% average recycled content across all plastic packaging



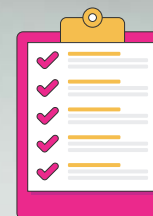
100%

of plastics packaging to be reusable, recyclable or compostable by 2025



PLASTIC ELIMINATION AND REUSE ROADMAP FOR THE FOOD-TO-GO SECTOR

BUSINESS POLICY, AUDITING AND REPORTING



2021

Top 20 food-to-go businesses outline strategies to reduce single-use plastic and incentivise reuse, with targets set **B**

Top 20 food-to-go businesses collaborate in a working group to embed reuse schemes and learnings **R**

High street chains disclose their plastic footprint **T**

2022

50% of Top 20 audit or disclose figures **T**

2025

100% of Top 20 opt for auditing or disclosing figures **T**

OVERARCHING TARGETS BY 2025

- Businesses reduce their plastic use by 50% in favour of reuse systems.
- Businesses actively promote reuse options above single use.
- Food-to-go sector voluntarily commits to transparent auditing and reporting of data.

B BUSINESS STRATEGY


L REQUESTS FOR GOVERNMENT LEGISLATION

R RECYCLING

R REUSABLE SYSTEMS

F FINANCIAL MECHANISMS

T TRANSPARENCY



2021

- Top 20 businesses offer & promote free water refills & are listed on the Refill app **F**
- No promotion or deals on bottled water across the sector **B**
- All of the top 20 businesses report bottled water sales **T**

2022

- Top 20 businesses report bottled water sales reduced by 25% **T**

2023

- Top 20 businesses report bottled water sales reduced by 50% **T**

2025

- End UK sales of single-use water bottles **B**

OVERARCHING TARGETS BY 2025

Plastic bottled water not sold in the sector & is not replaced by other materials. Water refills widely available



2021

- Reusable cups are accepted & promoted across the sector & outlets are listed on Refill app **F**
- Discounts offered & promoted for reusable **F**
- All cup sales reported **T**
- Dedicated recycling bins in every outlet providing disposable cups **R**

2022

- Charges for disposables across the sector **F**
- 25% of on-the-go cups are reusable through customer owned, vendor or city-wide desposit return schemes **R**
- Report on cup recycling rates. 25% cups recycled **R**

2024


- 50% of on-the-go cups are reusable through customer cups and vendor reuse schemes **R**

2025

- Latte levy passed by Gov **L**
- 75% of on-the-go cups are reusable **R**
- 100% of single-use cups being recycled **R**

OVERARCHING TARGETS BY 2025

75% of on-the-go cups are reusable through customer cups and vendor reuse schemes



2021

- Reusable containers are accepted & promoted across food takeaways & outlets & are promoted on the Refill app **F**
- Dedicated recycling bins in every outlet providing disposable containers **R**
- Discounts offered for consumers bringing reusable containers **F**

2022

- 10% of takeaways are sold in reusables **R**
- Report on container recycling rates. All single use containers are 100% recyclable **R**
- Charges for disposable containers across the sector **F**

2023

- 25% of takeaways are sold in reusables **R**

2025

- 50% of on-the-go boxes are reusable through customer-owned, vendor or city-wide deposit return schemes **R**
- 100% of single-use containers being recycled **R**

OVERARCHING TARGETS BY 2025

50% of on-the-go boxes are reusable through customer-owned and vendor reuse schemes

B BUSINESS STRATEGY

L REQUESTS FOR GOVERNMENT LEGISLATION

R RECYCLING

R REUSABLE SYSTEMS

F FINANCIAL MECHANISMS

T TRANSPARENCY

2022

25% of food-to-go has reusable milk systems **R**

Plant-based milks available in bulk refill systems for cafés to use **R**



2025

50% of food-to-go has reusable milk systems **R**

OVERARCHING TARGETS BY 2025

- 50% of food-to-go outlets have milk from refillable urns
- Plant-based milks supplied to chains in bulk refill systems



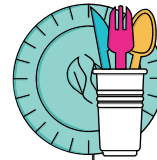
2021

Reusable masks and visors are provided for all staff by 2021 **R**

2021

100% of plastic and bioplastic cutlery removed for eat-in **B**

Where washing facilities are present, 100% of crockery and cutlery are reusable for eat-in **R**



2022

Reintroduction of washing facilities where space allows. Where washing facilities aren't present, reuse schemes introduced for eat-in **R**

2023

100% of plastic and bioplastic cutlery removed for takeaway **B**

2025

SUP directive is extended to include cutlery **L**

75% of eat-in cutlery and crockery is reusable either using traditional crockery or reusable scheme infrastructure **R**

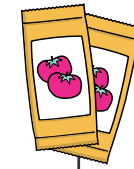
OVERARCHING TARGETS BY 2025

75% of cutlery & crockery is reusable using crockery or reusable scheme infrastructure. Plastic & bioplastic cutlery unavailable

2021

Eat-in in-store sauces available in bulk pump containers **R**

No disposable sachets are used for eat-in **B**



2025

SUP directive is extended to include sachets **L**

No disposable sachets are used for takeaway **B**

OVERARCHING TARGETS BY 2025

Sachets not served for eat-in meals

2021

Outlets all have segregated waste streams **B**



2023

Eliminate all non-recyclable packaging, including laminates and films **R**

OVERARCHING TARGETS BY 2025

Industry works collaboratively with local waste collectors to ensure all recyclable packaging is actually recycled

SO... WHAT NOW? BUSINESSES NEED TO COMMIT AND BE TRANSPARENT

Policies have to change. Whilst we completely appreciate the challenges the sector is facing, we need to act. We need to build back better and create a more sustainable future. Businesses in the food-to-go sector need to be ambitious, committed and transparent about their reduction and reuse targets and whether they meet them.



Frozen food retailer Iceland published its own 'plastic footprint' in September 2020 and this is an excellent lead to follow. Transparency is everything. Together we can think outside the SUP box and collaborate to design reusable systems of delivery.

We support the work of Greenpeace, who in the recent 'Unpacked' report, has set clear recommendations for the retail sector that we believe should also be applied to the food-to-go sector.⁵²

We would like to see businesses:

- Collaborate to standardise reusable packaging.
- Collaborate on supply chain projects.
- Cooperate on reuse pilot projects and rapidly scale successful ones.
- Share learnings on reuse and work together to resolve any legal and infrastructure challenges around switching to reuse.
- Agree to report detailed yearly data on single-use packaging.

We call on the sector to collaborate and come together to share experiences and best practice on reuse schemes – especially as McDonald's has a scheme planned for early 2021.

THE RISE OF THE REUSABLES

In terms of encouraging reusables, scale really matters. A 25p discount often has a take-up of no more than 5%, but Pret A Manger gains a commercial advantage by offering a 50p discount to attract greener customers. Since the discount doubled from 25p in January 2018, usage has



increased almost 20-fold.⁵³ Prior to covid-19, they served over 150,000 drinks in reusable cups every week globally.

COSTING THE EARTH

Hospitality, and food-to-go in particular, is a very competitive sector and it is clear that cost reduction is important. The Ellen MacArthur Foundation (EMF) estimates that converting 20% of current SUP packaging to reusables already presents an economically attractive proposition worth at least US\$10bn.⁵⁴

STAFF TO LEAN ON

Frontline staff were given keyworker status during lockdown. Now they need keyworker status in the fight against the plastic plague. Empower them. Keep them engaged. New research commissioned by the Carbon Trust shows that over 70% of companies expect environmental management and sustainability initiatives to become more important as a result of the covid-19 crisis.⁵⁵ It's worth noting that when Boston Tea Party banned single-use coffee cups, staff engagement increased.

MODEL BEHAVIOUR CHANGE

When businesses and customers work in tandem, there will be true long-term impact on plastic use. And businesses need to start the chain reaction. If a customer hasn't previously been able to refill in-house, then they won't ask for it. If they're given the option, they'll show support for that plus further initiatives. There appears to be a lack of trust around businesses doing the 'right thing' – with the majority believing that large corporations have been slow to offer a greater range of sustainable products. 45% believe there is conflicting advice when it comes to what you should and shouldn't do to be eco-friendly.⁵⁶



100 MILLION

pieces of plastic saved to date

JOIN THE REFILL REVOLUTION

If you're a food-to-go business and you haven't yet joined the 30,000 outlets signed up to City to Sea's Refill campaign, get going and join up. We connect people to places they can eat, drink and shop without pointless packaging. From hot drinks to drinking water on the go, or even shopping with less plastic, Refill puts the power to go packaging free at consumers' fingertips. With more than 300,000 app downloads and over 100 million pieces of plastic saved to date, we've shown that Refill has the power to create a tipping point when it comes to preventing pointless plastic.



WE'RE HERE TO HELP

We understand that businesses are experiencing unprecedented challenges right now. City to Sea, alongside our knowledge partner Eunomia, is on hand with expert advice and support to help address the barriers to change.

We'll continue to help with finding simple solutions to this complex issue, in 2021 and onwards, identifying the best reusers and the worst wasters.

“ BY WORKING TOGETHER,
WE CAN DRIVE AND REWARD
POSITIVE LONG-TERM CHANGE.

City to Sea

ACKNOWLEDGEMENTS

With thanks to all those who have contributed to making this report, including the authors of the following reports:

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- Footprint Intelligence and BaxterStorey, 'The future of foodservice packaging', 2020
- ReSource Plastic, 'Transparent 2020: mapping corporate action on plastic waste', 2020

OTHER HELPFUL GUIDES AND VIDEOS CREATED BY CITY TO SEA

- Contactless coffee guidance and video: <https://www.citytosea.org.uk/contactless-coffee>
- Water refill guidance and video: <https://www.citytosea.org.uk/water-refill-guidance>
- Takeaway packaging guidance: <https://refill.org.uk/wp-content/uploads/2019/11/Navigating-disposables-and-reusables-Refill-2019.pdf>
- PPE guidance and video: <https://www.citytosea.org.uk/ppe>
- Bioplastics: <https://www.citytosea.org.uk/bioplastics>

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- The international Break Free From Plastic alliance's European arm, the ReThink Plastic Alliance, has a useful summary of the SUPs Directive's contents and next steps here: https://rethinkplasticalliance.eu/wp-content/uploads/2019/05/ZWE_Unfolding-the-SUP-directive.pdf
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44. For example, this Welsh Parliament briefing analysing and making recommendations as to the UK Environment Bill: <https://senedd.wales/Research%20Documents/20-31-Environment-Bill/2020-31-eng.pdf>
45. <https://www.ft.com/content/3b0cdbce-c858-4749-bae8-0e6b7ed6c007>
46. City to Sea shares the concerns of members of the Greener UK coalition of major environmental organisations as to the need to strengthen the Environment Bill in its core areas of environmental principles, governance and enforcement. For more information see: <https://greeneruk.org>
47. This group is led by Surfers Against Sewage, the National Federation of Women's Institutes, Tearfund, Friends of the Earth and Keep Britain Tidy. Together with MPs from across the political spectrum, these groups are calling for plastic pollution and waste targets to be set via the Environment Bill and implemented in line with their Plastic Pollution Bill, itself based on the Climate Chance Act approach.
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