# Follow the carrot

## Can free school meal expansion boost the UK food and farming economy?

AMPNEY BROOK FOUNDATION

Brenner & Co

sustain
the alliance for better food and farming

**Report authors:** Myles Bremner and Rosie Osborne, Bremner & Co.

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Barbara Crowther and Naema Jannath, Children's Food Campaign, Sustain; Götz Bechtolsheimer and Geetu Bhan, The Ampney Brook Foundation; Harry MacKay, Bremner & Co.

**Extra helping: Beef, beans and balancing school plates:**
Rob Percival, The Soil Association

**Case studies:**
Nick Hughes

**Project advisory group:**
Andrew Archer, Dewberry Redpoint; Michael Barker, Fresh Produce Journal; Bethan Cowell, NFU; Hannah Gibbs, Sustain/Bridging the Gap; Charlie Jackson, EM Foods; Jayne Jones, Public Sector Catering Alliance; Kevin Morgan, Cardiff University; Nicola Nixon, University of York; Dan Parker, Veg Power; Kelly Parsons, University of Cambridge; Sophie Pritchard, Soil Association/Food for Life; Nassim Tahamtani, Chefs in Schools; John Walgate, British Growers Association; Derek Wright, Blackpool Council and LACA.

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Impact on Urban Health

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# Executive summary

Schools account for around 60% of the UK's £5 billion annual public sector food spend.[1] Increasing school meal uptake via the expansion of free school meals (FSM) presents a major opportunity not only to **grow this market but to ensure a greater share of spending reaches UK producers**.

This research, conducted by Bremner & Co and commissioned by Sustain and the Ampney Brook Foundation, explores the economic opportunity that expanding FSM offers for UK producers and wider public sector supply chains. Our findings suggest that universal FSM in England could **increase school meals served per year from 1 billion currently to more than 1.54 billion**. This has the potential to drive up to a **54% uplift in demand** from schools for **key UK-produced ingredients** and represents an **opportunity worth over £600 million annually in food procurement** for producers and suppliers. Realising this opportunity would be a tangible step towards meeting the government's food strategy aims to bolster domestic production and improve the sustainability of public sector food.

However, **the opportunity is conditional**. Stakeholders across the supply chain were clear: without targeted action, benefits will not be realised. Success depends on:

- **Fair and transparent funding** that reflects the true cost of delivering high-quality school meals and ensures spending reaches its intended target within the system
- **Updated public procurement frameworks** that create flexible, accessible systems to support small to medium-sized enterprises and local and regional supply networks
- **Infrastructure and workforce investment**, particularly in regional prep hubs, school kitchens, and staff skills
- **Transparent data and monitoring**, enabling better oversight of sourcing, spend and standards compliance

The government has now announced that from September 2026, all children in households in England receiving Universal Credit will be entitled to FSM.[2] Alongside this, a review of the School Food Standards is also underway. These welcome updates make this research especially timely. With school meal uptake set to rise, there's a clear opportunity for government to boost British and sustainable sourcing in school food supply chains - unlocking economic potential and alignment with climate change targets, alongside well-established benefits for poverty reduction, children's health, and learning.

This report supports further FSM expansion, calls for school food to be embedded in the new cross-government food strategy, and highlights the need for stronger systems and standards to build a fairer, more resilient public sector food economy.

# Introduction

This research explores the potential for free school meal (FSM) expansion to provide an economic boost to UK food and farming.

There is strong and growing support for investing in healthy school meals for all. A complex and burdensome registration process, restrictive eligibility criteria and stigma are some of the factors that cause many school children living in deprivation to miss out on FSM.[3] The Child Poverty Action Group (CPAG) has previously estimated that 900,000 children living in poverty are missing out on this critical nutritional lifeline.[4]

The government has now confirmed that from September 2026, all children in households on Universal Credit (UC) will be entitled to FSM, which they estimate will immediately lift 100,000 children out of poverty and benefit more than half a million children.[5] However, some suggest this vastly underestimates the number of children who will benefit from the policy change.[6] The government has also initiated a review of current School Food Standards, to ensure they reflect the latest nutrition guidance. These policy shifts mark a major opportunity to strengthen school food procurement systems and deliver wider social, environmental and economic returns.

The potential benefits to children and wider societal benefits of both automatically registering eligible children and expanding FSM to more children have been well evidenced.[7] However, whilst existing research demonstrates broad socio-economic returns of FSM investment[8], the potential economic impact on domestic food production and supply has had less attention, which this research begins to explore.

# Why this research matters

1. For government more broadly, there is **determined focus on economic growth**. UK public sector food expenditure is a significant market[9], worth around £5 billion each year.[10] Spending for education settings (including nurseries, schools and universities) is believed to account for more than half of this.[11] There is a **strong and growing evidence base for the investment value of universal school meals**, including one analysis that estimates a return of £1.71 for every £1 spent, with potential system-wide benefits reaching £99.5 billion.[12] One local authority caterer suggested benefits far exceeding this; *"for every pound we spend, it's worth three within our local communities."*

2. In 2023, The Labour Party made a **commitment to targeting 50% locally produced and sustainable food for the public sector**, and since being elected has restated this objective, with an ambition to *"use the Government's own purchasing power to back British produce"*.[13] However, even if this target is introduced within the Government Buying Standards, it would not affect schools, as this framework is not currently mandated in the education sector.

3. In July 2025, the first publication by the UK government food strategy reaffirmed the **government's intention to embed public sector food as a lever for wider food system transformation and economic benefit**.[14] It offers renewed momentum to ensure public food procurement supports healthier, more sustainable, and resilient supply chains. There are already practical shifts under way in terms of creating a more agile, equitable marketplace in public sector food. The recent 'Buying Better Food' framework developed for Crown Commercial Services aims to improve access for smaller domestic suppliers and introduce more transparency into public sector supply chains.[15]

4. Climate-related and supply chain pressures are creating growing uncertainty across UK and global food systems. **School food sits at the intersection of many of these challenges, offering a valuable space to explore more joined-up, practical solutions**. With around 80% of all fruit and 50% of all vegetables currently imported[16], there is a growing need to **strengthen domestic supply chains to support a more resilient, healthy and sustainable food system**. The latest report and carbon budget from the UK Climate Change Committee also sets out explicit targets for reducing livestock numbers and meat consumption, with **recommendations to increase choice and availability of lower carbon foods in public procurement**. Addressing these challenges and targets requires stronger support for UK producers, many of whom are struggling to stay in the sector. Confidence remains fragile after years of disruption - from labour shortages and volatile costs to extreme weather and uncertain policy signals - all undermining long-term planning and investment.[17]

5. **Devolved nations** already offer promising **examples of innovative approaches to school food**, providing valuable lessons to inform **more ambitious policy** in England and across the UK. In **Wales, the Welsh Veg in Schools** project has shown how targeted support can increase the use of locally grown vegetables in school meals, benefiting both pupils and producers while building supply chain resilience.[18] In **Scotland, the 'Give Peas a Chance' pilot in Aberdeenshire has introduced organic locally grown peas into school meals, whilst Argyll and Bute** has led the way by becoming the first UK local authority to serve wild venison in school meals. Initiatives like these moves support more sustainable food sourcing, and introduce children to nutritious, locally sourced ingredients.[19] Whilst no model is without its challenges, they highlight that **it's possible for school meals to act as a lever for system-wide benefits**.

This research considers the economic case for FSM expansion by exploring the potential boost that increased school meal uptake in England could offer to UK-wide food and farming. Alongside quantitative analysis, the challenges and opportunities within the school food system are examined through the experiences of those who work and operate within it. The research is especially timely in the context of upcoming FSM expansion, offering insight into how this policy shift could deliver broader benefits across the food system.

> *For the first time ever, we are measuring where the public sector buys food from so we can use the Government's own purchasing power to back British produce wherever we can... This means British farmers and producers can compete for a fairer share of the £5 billion pounds a year the public sector spends on food. That's money straight into farmers' bank accounts to boost turnover and boost profits.*
>
> **Steve Reed, Environment Secretary speaking at the NFU Conference in February 2025**[20]

# The approach

This research aimed to:

- Quantify the potential economic opportunity for UK producers from increased school meal uptake
- Capture the complexity of the current supply landscape, including challenges, trade-offs and potential levers for change
- Ensure the findings were tested with, and informed by, those actively producing, supplying, and delivering school food across the UK

School food policy is devolved to each UK nation. Whilst our data analysis and modelling only covers England, we have taken a UK-wide view of food and farming, recognising the interconnected nature of the UK food and farming system with integrated supply chains and shared challenges facing producers across the country.

## Project Advisory Group

We established a Project Advisory Group (PAG) to guide and challenge our work. The group brought together representatives across producers and growers, academia, catering, wholesale, NGOs, nutrition and media.

The PAG met three times during the project and provided essential feedback, helped validate emerging findings, and supported access to relevant contacts and data sources. We are grateful for the time and insight generously shared.

## Data

We sourced data from across the school food supply chain, alongside publicly available government datasets. Our analysis focused on:

- Types of ingredients and products used in school meals
- Total volumes of each ingredient used over the course of a school year
- Proportion of each ingredient sourced from within the UK
- Costs of UK-grown products, based on volume

To examine economic opportunity, we explored value chains for four specific ingredients: carrots, potatoes, broccoli and beef. Selection was based on the following criteria:

- ✓ Popular with children
- ✓ Can be produced well in the UK
- ✓ Capacity to scale up UK production
- ✓ Makes up a ‘school plate’

Further considerations for our approach included:

- Aggregating by whole ingredient category, for example, analysing data for ‘carrots’ rather than ‘Prepared carrot batons 1kg’
- Focusing on minimally processed ingredients, to reflect the simplest supply chains and support the principle of cooking from scratch
- A recognition of the need to increase consumption of plant proteins alongside reducing known reliance on imported highly processed meat products in schools

## Interviews and case studies

This research was informed by interviews with over 30 stakeholders across the school food system, including producers, caterers, suppliers, policymakers, local authorities, campaigners and academics. We are grateful for their invaluable contributions, which shaped our understanding of the opportunities and challenges within the system.

We also gathered in-depth case studies to further illustrate the realities of producing and supplying food to schools and demonstrate what is possible when the right conditions for success are in place. These are featured throughout the report, and in the Appendix.

> *The issue is a focus on low-cost procurement. Procurement can't be treated as a silver bullet and needs to be integrated with policies for production of fruit and veg for example, as well as policies for consumption, because good food doesn't make a difference unless children in schools consume it.*
>
> **Professor Kevin Morgan, author of *Serving the Public*[25]**

# What did we find out?

## Current meals and expansion opportunities

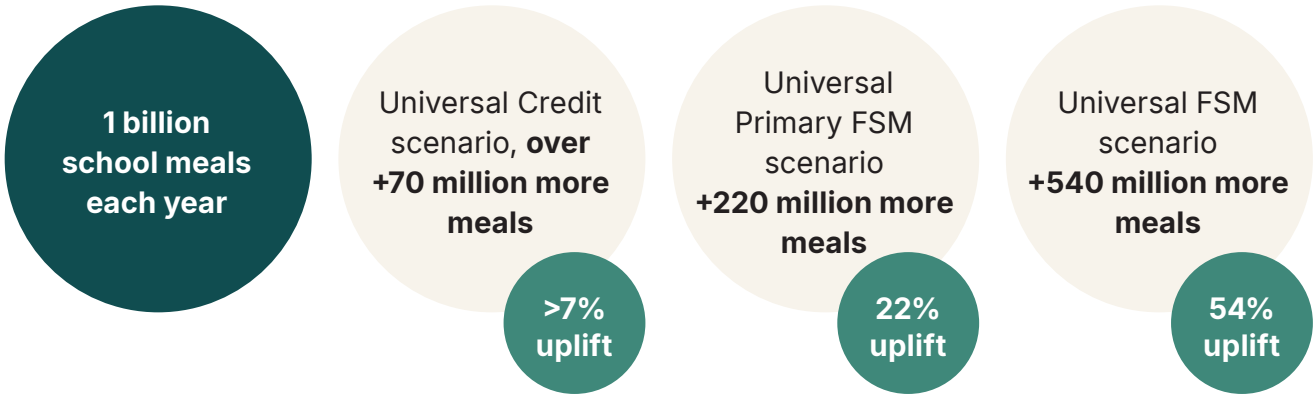
We estimate the economic opportunity under three potential FSM expansion scenarios in England:

1. Expanding to all pupils living in households who are in receipt of Universal Credit (UC)
2. Expanding to all primary school pupils (UPFSM)
3. Expanding to all primary and secondary school pupils i.e. universal FSM (UFSM)

Whilst the government has committed to implementing scenario 1, we continue to model all three to explore both the near-term potential this announcement unlocks and how further expansion could significantly scale the opportunity for UK food and farming. These insights may help shape future policy ambition.

Our analysis estimates that England's school food system serves around **1 billion meals each year**[21] with government funding currently set at £2.58 per meal (for 2024/25). Of this, an estimated **£1.16 is spent on food**[22]**, which means approximately £1.16 billion per year is directed to food purchasing for schools**.

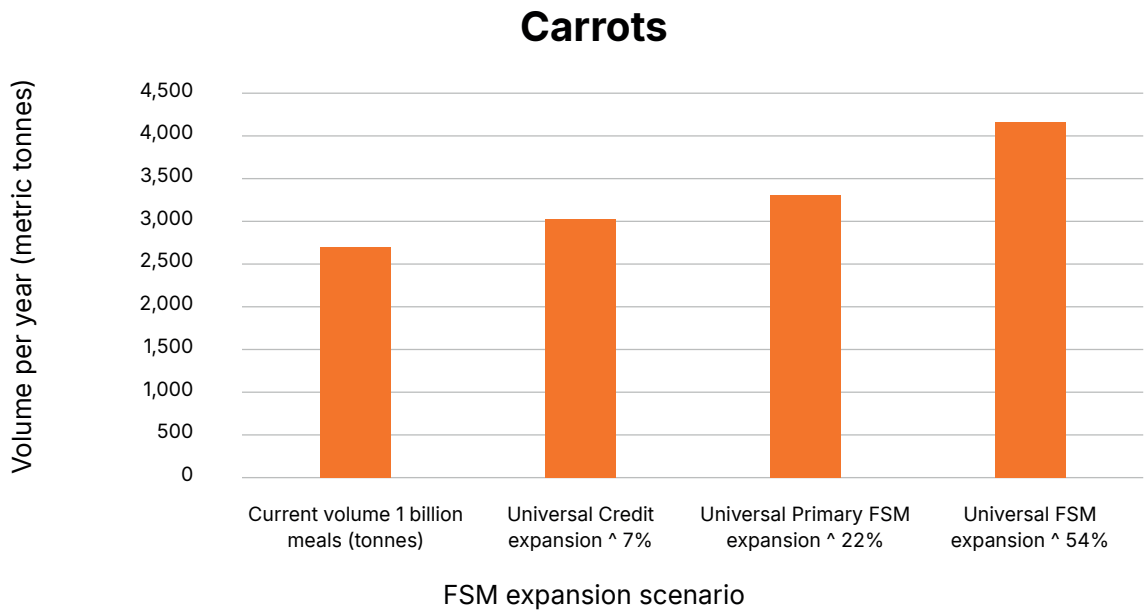
From September 2026, expanding FSM to all pupils in households in receipt of UC may result in an immediate uplift of more than **70 million additional meals in the first year**.* A commitment to universal school meals could introduce over **540 million additional meals per year**. This latter scenario could generate a **£600m uplift in public sector spend on food**.[23] Directing this increased spend towards UK producers and supply chains would deliver a major opportunity to boost domestic food production and unlock wider co-benefits across the public sector food economy.




*Accounting for an estimated proportion of pupils newly FSM eligible who are currently paying for meals. In reality this figure could be much higher.

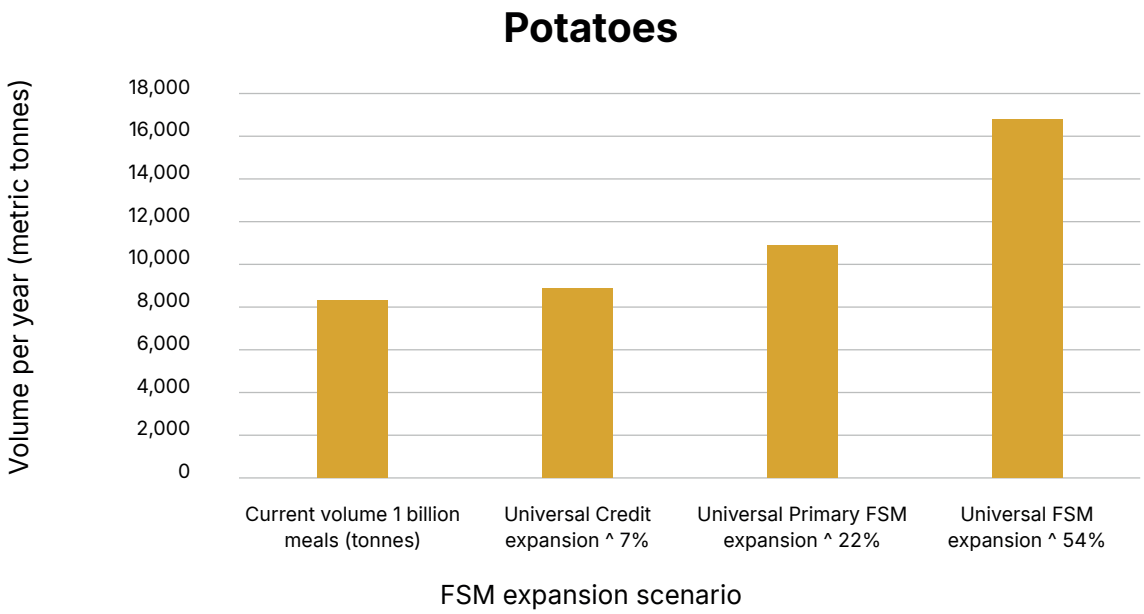
## The school plate

To explore the practical implications of this uplift for UK growers and producers, we modelled the potential rise in demand for certain staple ingredients frequently used in school menus: carrots, potatoes, broccoli as well as British beef and plant-based proteins such as beans. The estimated uplift in volume for these ingredients based on the three FSM expansion scenarios is illustrated below. These estimates are based on **procurement data from a sample of school caterers and reflect current purchasing of ingredients from within the UK.**[24]

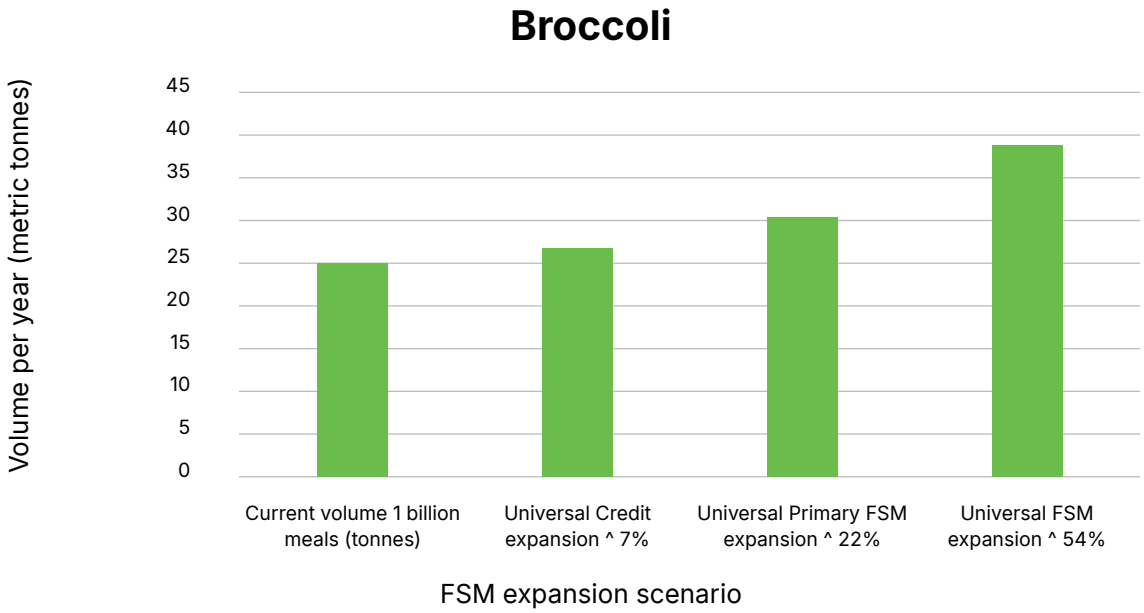



> *Often the issue we have with retail is that the specs are quite high. We have a number of 'wonky veg' lines, but finding a way to use those lower spec products is a challenge for us. It would be great if we had an avenue through which to sell that produce [into schools].*
>
> **Carrot producer**

> *On a good growing year, you could go all the way through with carrots 52 weeks a year.*
>
> **Carrot producer**

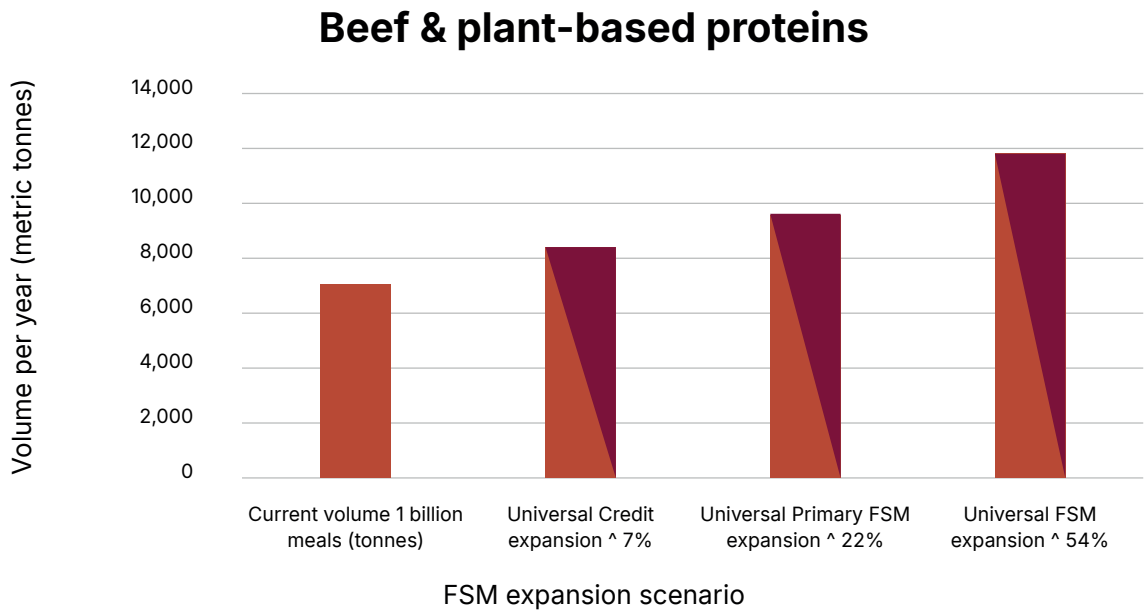



We heard about swaps to frozen imported produce leading to highly processed versions of ingredients showing up on school plates, when these ingredients can be produced domestically, such as potatoes.




The brassica sector sees a big chance to grow the UK broccoli market during its June-to-November season. Other brassicas like cauliflower and cabbage are grown year-round and could be seasonal swaps in schools to cut food miles and boost plant diversity on children's plates.

> *We've got lorries going all over the country every day... we can deliver a pallet to a distribution point daily if required.*
>
> **Brassica producer**




*Note:* This graph takes the number of meals containing beef as a starting point, with growth representing a future balance between less and better British beef and plant-based proteins eg. beans.

- Our beef data leaned towards higher domestic sourcing because it came from Food for Life certified caterers[26], who usually buy more British beef than average.
- Whilst there is a clear opportunity to increase overall volumes of UK grown vegetables, sourcing of beef needs to be set within the context of the UK Climate Change Committee's target to reduce overall red meat consumption by 40% by 2050, whilst increasing choice and availability of lower carbon foods in public procurement.[27]
- Where beef or other meat continues to be served, the goal should be to prioritise high-quality sourcing from UK farmers. Overall, the focus should be dialling up plant-based proteins and especially reducing consumption of highly processed meat. This helps to mitigate high beef prices[28], by reducing volume, whilst supporting health and environmental goals (see section on 'Beef, beans and balancing the school plate', page 18).
- Recent research by the Food Foundation found that 3 of the top 5 meat dishes currently eaten in schools are processed; including ham, sausages and sausage rolls.[29] This strengthens the case for 'less but better' meat dishes in schools, to reduce reliance on imported processed meat products and increase capacity to incorporate more British beans and pulses into meat-based dishes as well as plant-based menu options.

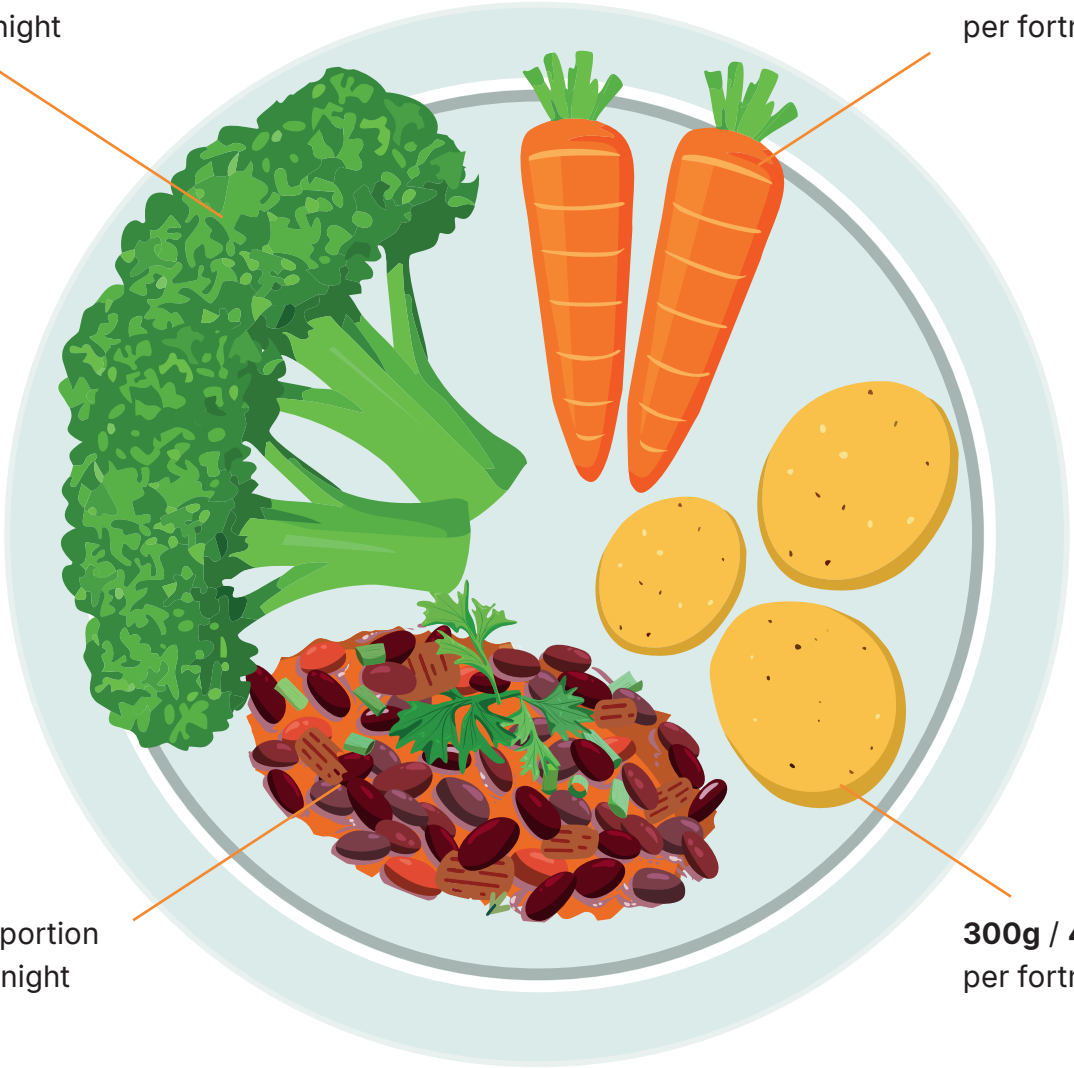
Scotland shows what's possible when the **right frameworks and incentives are in place**. In 2024, 300 schools joined Quality Meat Scotland's Meat Voucher Scheme, using high-quality, sustainably produced red meat from assured farms into pupils' diets and educational activities.[30] The scheme helps educate pupils about the value of domestic food production and bolsters public procurement support for sustainable local producers. Meanwhile, in Aberdeenshire, the Give Peas a Chance pilot project has successfully integrated domestically grown organic split peas into traditionally meat-based dishes such as bolognese, reducing meat content and cost, whilst increasing plant protein and fibre, and this has proved popular with pupils. The model is now being expanded across North East Scotland.

## What if we went further? The ‘Maximum British Plate’

What could it look like to maximise the role of British ingredients on school plates?

**50g** / **2** portions
per fortnight

**50g** / **2** portions
per fortnight



**82g** / **1** portion
per fortnight

**300g** / **4** portions
per fortnight

Earlier calculations illustrate the potential uplift in demand for domestically produced food **based on current purchasing behaviours**, where ingredients are already being sourced from within the UK by some caterers. However, if government is serious about meeting its target for 50% of food in the public sector to be ‘local or sustainable’, it will be necessary to go **beyond business as usual**.

We recognise the UK cannot produce everything domestically, and that seasonality limits availability. That means **ingredients we can produce well**, including those which this research focuses on, **need to work harder on school menus** for domestic procurement goals to be met.

We therefore went a step further to imagine what a **"Maximum British Plate"** could look like.

This is based on:

- Recommended portion sizes and number of portions per fortnight for our 4 ingredients as set out in the current School Food Standards
- Average prices currently paid for each ingredient (according to catering data analysed)
- A baseline of 1 billion meals per year, then scaled up in line with our maximum Universal FSM expansion scenario

Our findings point to a significant growth opportunity if this model were adopted in order to **maximise the use of British ingredients in school meals**. The impact of **expansion to all children in households on UC** could lead to, at a minimum, a **7% increase in UK-produced food demand in schools**. This presents a significant economic opportunity across school food supply chains in the near-term.

If implemented under a UFSM scenario, a **54% increase in ingredient volumes could unlock substantial market potential for domestic producers**, provided the **right conditions and routes to market are in place**. For example, the value of British potatoes used in schools could rise from £155 million to £240 million per year, equivalent to 8.3 million sacks or 200,000 metric tonnes. The charts below further illustrate this opportunity.

Our projections are based on the existing School Food Standards. With a review of these standards currently underway, any changes to increase frequency or portions served of vegetables, fruit, plant-based proteins and fibre, or which reduce frequency and volumes of higher carbon or less healthy components such as processed meats, dairy or sugary desserts, will also necessarily impact on future opportunities for British producers.

The volumes here represent quantities served on plates as they were calculated using SFS guidance on volumes. Wastage during preparation could mean volumes purchased would necessarily be much higher.

This analysis based on the 'Maximum British Plate' further highlights the **potential of FSM as a strategic lever to support a more economically viable UK food system**.

## School Food Standards (SFS) for England

The School Food Standards are statutory requirements governing food provided throughout the day in all maintained schools, academies, and free schools in England.[31] They aim to support children's health, development and concentration by ensuring access to nutritious, balanced meals throughout the school day. The current standards offer guidance on different elements of food provision in schools, including a minimum provision of fruit and vegetables.

1,000 lorries

£11m per year

1,540 lorries

£18m per year

5.1 million sacks

£155m per year

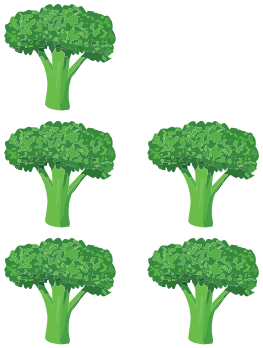
7.8 million sacks

£250m per year

848 million florets

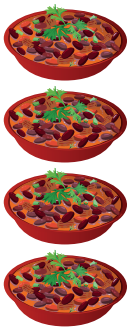
£42m per year

1.3 billion florets

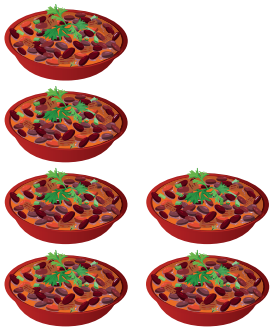


£68m per year

106 million portions of chilli



163 million portions of chilli



Value increase directed towards increased inclusion of plant proteins alongside British beef

## KEY

**Green** = current 1 billion meals

**Orange** = potential 1.54 billion meals

## ASSUMPTIONS

**Lorry with carrots** = 10 metric tonnes

**Floret broccoli** = 12.5g

**Sack of potatoes** = 25kg

**Portion of chilli** = 82g protein combining beef + beans

# Extra helping: Beef, beans and balancing school plates

*By Rob Percival, Head of Food Policy at the Soil Association and author of The Meat Paradox*

The government is considering introducing mandatory procurement standards across the public sector, including in schools. In tandem, the government is looking to channel public food spend into the pockets of UK producers, 'resetting' their relationship with the farming industry. What does this mean for meat on school menus, and for beef in particular?

The benefits of meat on school menus are complex and sometimes conflicted. Chicken and pork are a good source of protein, but welfare standards are characteristically low, and much of the chicken served in schools is imported from overseas. Beef is a good source of both protein and iron – but cows belch methane, meaning that beef typically carries a higher climate impact than plant proteins.

In contrast, beans and pulses are not only climate-friendly but also rich in fibre, a nutrient severely lacking in children's diets.[32] Understanding of these tensions surrounding 'the right proteins' is growing as environmental and sustainability education in schools becomes more prevalent, as catering businesses become more climate-minded, and as expectations are placed on school leaders; schools must now have a sustainability lead and a climate action plan in place.

Looking through the lens of *climate* and *nutrition* (fibre in particular), there is a robust case for caterers to serve **more beans and pulses**, with growing demand from the public sector and calls for government to help farmers invest in plant protein production.

What does all this mean for beef? With cost an additional consideration, there are several reasons why a 'less and better' approach could be the way forward. British beef can still play an important role on school plates, especially if this beef is sourced from nature-friendly production systems.

The relatively heavier climate impact of beef might mean schools and caterers will need to invest more emphatically in other greenhouse gas-saving measures, such as **cutting food waste or buying locally**, while cutting energy use in kitchens, alongside increasing use of lower carbon-emitting ingredients in recipes.

**Balance and creativity are key**. The challenge of making beans and pulses appealing to children may also require creativity and investment in kitchen skills, recipe testing and considered approaches to integrating plant proteins into composite dishes containing less and better British-sourced meat.

> *There is a robust case for caterers to serve more beans and pulses.*

# Case study: BeanMeals

## Full of beans: British beans in school meals

Beans and pulses are a sustainable and nutritious protein source and are growing in popularity but remain underutilised in school catering. The BeanMeals project[33] demonstrates the opportunities of serving more plant proteins in schools by integrating UK-grown beans into menus and engaging pupils through food-based learning.

Trials in six Leicestershire schools showed how simple, familiar dishes like stews and bolognese could incorporate beans, supporting efforts to reduce meat while maintaining appeal. Alongside menu changes, pupils took part in cooking and growing activities, and school staff received training and classroom resources to build knowledge and enthusiasm around plant proteins. The project shows that:

- Engaging pupils through cooking and growing boosts acceptance of plant proteins
- Staff training builds confidence to cook with beans in varied ways
- Flexible menus help plant-based options appeal across food cultures
- Supporting demand for UK beans strengthens local, sustainable supply chains

> *BeanMeals highlights the power of a whole-school approach to healthy sustainable food and the key importance of actively involving pupils and school staff throughout the process. The fun and engaging activities increased children's curiosity about food, and they were then more willing to try new and unfamiliar foods.*
>
> **Professor Charlotte Hardman, University of Liverpool**[34]

**The Bean Opportunity**

if revised standards commit to serving beans once per week

**6 million**
**children**

**x**

**1 portion**
**of beans per week**

**=**

**234 million**
**portions of beans per year!**

# Case study: Welsh Veg in Schools

## Getting home-grown veg on the menu

- Growing the market for locally produced food in Welsh schools
- Connecting small growers with public sector buyers

The Welsh Government's 'Procurement Act 2023'[35] has given small producers the opportunity to access contracts by making bidding processes simpler, creating flexible commercial frameworks and placing a duty on contracting authorities to consider SMEs in the tender process.

Since the Act was passed, numerous initiatives have sprung up across the country that connect local food producers with public sector customers.

One of these is the 'Welsh Veg in Schools' project[36], a cross-sector initiative to introduce more organically produced Welsh vegetables into primary school meals across Wales. Co-ordinated by Food Sense Wales and funded by the Welsh Government's 'Backing Local Firms Fund'[37] (with additional support from 'Bridging The Gap'[38], a programme led by Sustain, Growing Communities and Alexandra Rose Charity) the project is working across six local authorities to help deliver the government's commitment that every primary school-aged child is offered a FSM and that the ingredients come from local suppliers wherever possible.

The project **engages the entire value chain** from local authorities and health boards to farmers and food wholesalers like Castell Howell, who deliver to around 1,000 schools across Wales. The ambition is to develop a model that can be replicated across the entire Welsh public sector.

Currently, much of the veg served in Welsh schools is sourced from outside the country, often arriving frozen before being defrosted on site. The project is showing how **it's possible to help Welsh growers and farmers supply the public sector with fresh vegetables via the market of local authority FSM provision**.

- In schools across Bridgend County Borough Council, frozen broccoli is being replaced with fresh, organic broccoli grown on Langton's farm in Powys.
- A partnership between organic farmer Patrick Holden and regional wholesaler Castell Howell is helping get locally grown organic carrots into schools near Lampeter, West Wales. Castell Howell provides the local collection and distribution infrastructure; often a key barrier for SMEs trying to access public sector contracts, along with a guaranteed price for the carrots, enabling produce from Holden's 300-acre farm to reach school kitchens.

> *We aren't producing enough veg in Wales and we need to be building our own supply base, bringing benefit to local communities and reducing our reliance on imports through connecting local growers with local wholesalers and fostering relationships that help businesses flourish.*

**Katie Palmer, Programme Manager for Food Sense Wales**[39]

Welsh schools are now getting deliveries of Welsh veg boxes.
*Credit: Food Sense Wales*

# Conditions for success

## Overcoming barriers to realise the growth opportunity

The numbers are compelling – FSM expansion offers a clear economic opportunity for UK food and farming. Now that the government is expanding eligibility, there is greater urgency to establish the conditions for success and realise the associated opportunities across economic growth, public health and climate change goals.

However, throughout this research, stakeholders emphasised the **need for systemic change for these co-benefits to become a reality**.

Identified barriers include reliance on cheaper, often highly processed imports; contract structures that squeeze producers on price; insufficient local and regional supply chain infrastructure; and a lack of consistent enforcement of both procurement and food standards.

### Price and funding constraints

Current funding levels are a significant barrier to sourcing more British food. Domestic ingredients are often more expensive than imported ones, and public sector contracts are typically driven by a desire for lowest possible costs.

Interviewees consistently cited the funding gap as a major obstacle. One distributor put it plainly: *"We can get British food anywhere within the UK... but the problem is that schools will come back and say: we can't afford to put that on the menu."*

These price pressures are particularly acute for ingredients like beef, where domestic production cannot compete with imports. *"Beef products would be all imported, because it's so much, vastly, cheaper to import than [to buy] UK-produced,"* said one wholesaler. Another was even more stark: *"There's no way school children [are] going to be eating any British beef in the next two years."*

Others echoed these concerns. *"Retailers are just absolutely screwing the market... potato farmers are actively exiting the market... we can't afford British potatoes anymore,"* said one supplier. Another added: *"Price is probably the main factor... there's no point going to the local authority, because they're just looking for the cheapest price."*

> *Public sector contracts tend to be far lower price than any other contract, so it makes it a lot less attractive to sell into.*
>
> **Potato producer**

Stakeholders highlighted the need for **fair, transparent funding that reflects the real costs of production**. Increasing the meal rate to reflect inflation is important, but so too **is improving transparency in how food budgets are spent**. Without this, funding may be redirected towards non-food activity. Ensuring investment reaches the right stage in the supply chain is essential for enabling more UK sourcing and ensuring the quality of food served.

## Procurement rigidity and market access

Current procurement systems lack the flexibility needed to respond to changing supply conditions or support local and seasonal food. Slow procurement cycles and fixed-term contracts make it difficult for school caterers to adapt. One producer observed: *"Once you go below the scale of large suppliers, to smaller either farm-based or smaller processors, they can't operate that national scale. So, if [foodservice] contracts can be subdivided into regional contracts or small percentages, then it potentially allows more people to bid for it."*

The 'stop-start' nature of the school year term and holiday times further weakens the business case of supplying schools for producers. **Accessible procurement frameworks and contract models that instil supplier confidence** are needed to unlock this market. Interviewees stressed the need for **opportunities for SMEs and local producers**, and for contracts to address power imbalances and long-term demand security to enable more inclusive and resilient supply chains. This aligns with government's stated ambition to "boost profitability through fair competition across the supply chain" in the public sector.[40]

## Closing infrastructure and labour gaps

Many schools lack the kitchen infrastructure or staffing to handle more whole ingredients. This limits scratch cooking and drives reliance on pre-prepared and processed foods (much of which is imported), undermining quality of food and value placed on the school catering labour. *"The contracts that [are] available generally don't want a raw product. They want a processed, finished product. So that rules out for the most farmers being able to supply that product directly,"* noted one producer.

> *We're now using British potatoes in the mash - no more frozen processed imports from Europe. We've removed all the additives, palm oil, everything you'd normally find in a frozen product. Such a simple switch. Now we are peeling the potatoes in the kitchens, it's not just about saving money - it's about reinvesting those hours into the workforce.*
>
> **Derek Wright, Blackpool Local Authority caterer**

**Targeted investment in local or regional pre-prep infrastructure**, such as facilities for peeling, chopping or portioning produce, could help fill this gap, ease the burden on school kitchens, and make fresh, local food more accessible without compromising operational capacity. **Clearer national frameworks** and procurement guidance could also support more regional sourcing and enable collaboration between producers, caterers, and education providers. Our case study from Local Food Links (page 26) illustrates how coordinated regional efforts can help overcome these barriers in practice.

It's important to acknowledge that any significant expansion in FSM eligibility will require upfront investment in facilities, staffing, and logistics to meet rising demand.[41] This is something government needs to consider as it implements FSM expansion to all children in households on UC. However, over time, economies of scale could help bring down the cost per meal.

## Hidden data and the need for transparency

School food procurement data is fragmented, inconsistently reported and hard to access, making it extremely challenging to track expenditure or monitor outcomes in the current system. One advisory group member expressed disbelief: *"How is it that nobody knows where the millions being spent is going?!"*. This was reflected in the difficulty we encountered in gathering and making sense of available data for this research.

This lack of transparency also limits supplier access. *"We're not actually aware of the tender windows or opportunities [for public sector] whereas we get contacted by retail,"* said one producer. **Transparent procurement frameworks**, with clear **tracking of origin, assurance and spend**, are vital for holding suppliers to standards, giving producers confidence to invest, and enabling government to monitor progress against wider economic and environmental goals.

## Sector ready to supply, with the right incentives

With the right support, **many growers are ready and willing to supply more to the public sector**. Notwithstanding the wide and complex challenges facing UK food and farming, we heard clear enthusiasm for this market signal during our research.

> *There's huge ability to grow... no barriers, really... if the prices are right... there is so much opportunity there to use more... we're missing a trick.*
>
> **Brassica producer**

> *In terms of grower supply, we believe that the British fresh produce sector could quickly react to supply increased demand in vegetables... Obviously fruit would be a different consideration, with investment required in trees/glasshouses.*
>
> **John Walgate, Chief Executive, British Growers Association**

This **conditional readiness for sector growth** is also reflected in calls from bodies such as the NFU for an updated national horticulture growth strategy.[42]

## Governance, policy alignment and a seat at the table

Despite £5 billion public expenditure per year[43], public sector catering is often left out of national food policy debates; including notable absence from the new Food Strategy Advisory Board. This contributes to weak policy alignment and missed opportunities.

Responsibility for public sector food policy is currently fragmented across government departments. Schools aren't currently required to report on food origins or adhere to the Government Buying Standards, meaning that the government's 50% 'local or sustainable' target would be difficult to monitor or enforce in current circumstances. Structural change is therefore needed to give public sector food a stronger voice and a clearer mandate.

The latest food strategy update recognises current fragmentation and sets a **vision for a good food cycle** with ten outcomes for a healthier, more affordable, sustainable, resilient UK food system to feed the nation, nourish people and protect the environment and climate. This provides a unique opportunity to ensure UK policies and regulations **leverage the full value of UK school food procurement** in relation to these ambitions.

> *We need public sector caterers at the table... for the money to flow into the right places, and for the good food to arrive on the plates... they've got all the solutions.*
>
> **Kath Dalmeny, Chief Executive of Sustain**[44]

A **seat at the food strategy table** and a **coordinated, cross-departmental approach to public sector food** - particularly for education - are essential. As outlined, market demand alone isn't enough; a strategic approach is needed, one that addresses the conditions for success and supports the food system in unlocking the economic potential of growing demand for British food in schools.

# Case study: Local Food Links

## Good food from the community

- Supplying local schools with high-quality meals made from scratch
- Small suppliers get a secure source of income

In a school catering landscape dominated by big multinational contract caterers, Local Food Links is showing how a local alternative can thrive.

Local Food Links[45] was established in Dorset in 1999 as a community-owned social enterprise to run farmers markets and other local food initiatives. These included a hot meals service for schools and nurseries which has since become the organisation's focus.

Three hub kitchens located in Bridport, Blandford and Weymouth provide freshly prepared, nutritious meals daily to over 50 schools and nurseries throughout Dorset (along with one school in Devon). Meals are delivered either hot or for reheating on-site using the 'cook-chill' technique.[46]

As a not-for-profit, Local Food Links is free to prioritise the quality of meals it supplies. All meals, including desserts, are made from scratch in the hub kitchens using high quality, mostly unprocessed ingredients sourced as far as possible from local suppliers.

> *Working with local suppliers has always been an integral part of our brand. The custom we provide can make up a significant proportion of their income.*

**Caroline Morgan, Chief Executive, Local Food Links**

The emphasis is on creating varied and interesting menus that children will enjoy, while ensuring meals are well-balanced and meet School Food Standards.[47] Dishes are designed to be nutritious whilst still being familiar and comforting:

- Pasta sauces are packed full of vegetables and then blended
- Dates are incorporated into chocolate brownies

Supporting local suppliers is a high priority for Local Food Links. Meat is supplied by Dorchester butcher, Colin Clark & Sons, which benefits from having a regular, reliable source of income. Menus are shared in advance so the butcher can ensure whatever meat is needed to fulfil a particular order is in stock. Eggs are also sourced from a small local producer, while some dry goods come from a cooperative, Bako Western Ltd, based in Devon.

As Local Food Links has grown it has balanced its support for SMEs with relationships with larger suppliers that can make frequent deliveries and manage the complexity of big orders. Dorset-based Hunts Food Group, for example, has become a preferred supplier for ambient and frozen goods.

School staff have consistently observed how the quality of meals provided by Local Food Links has benefited children's behaviour and engagement, making learning more effective.

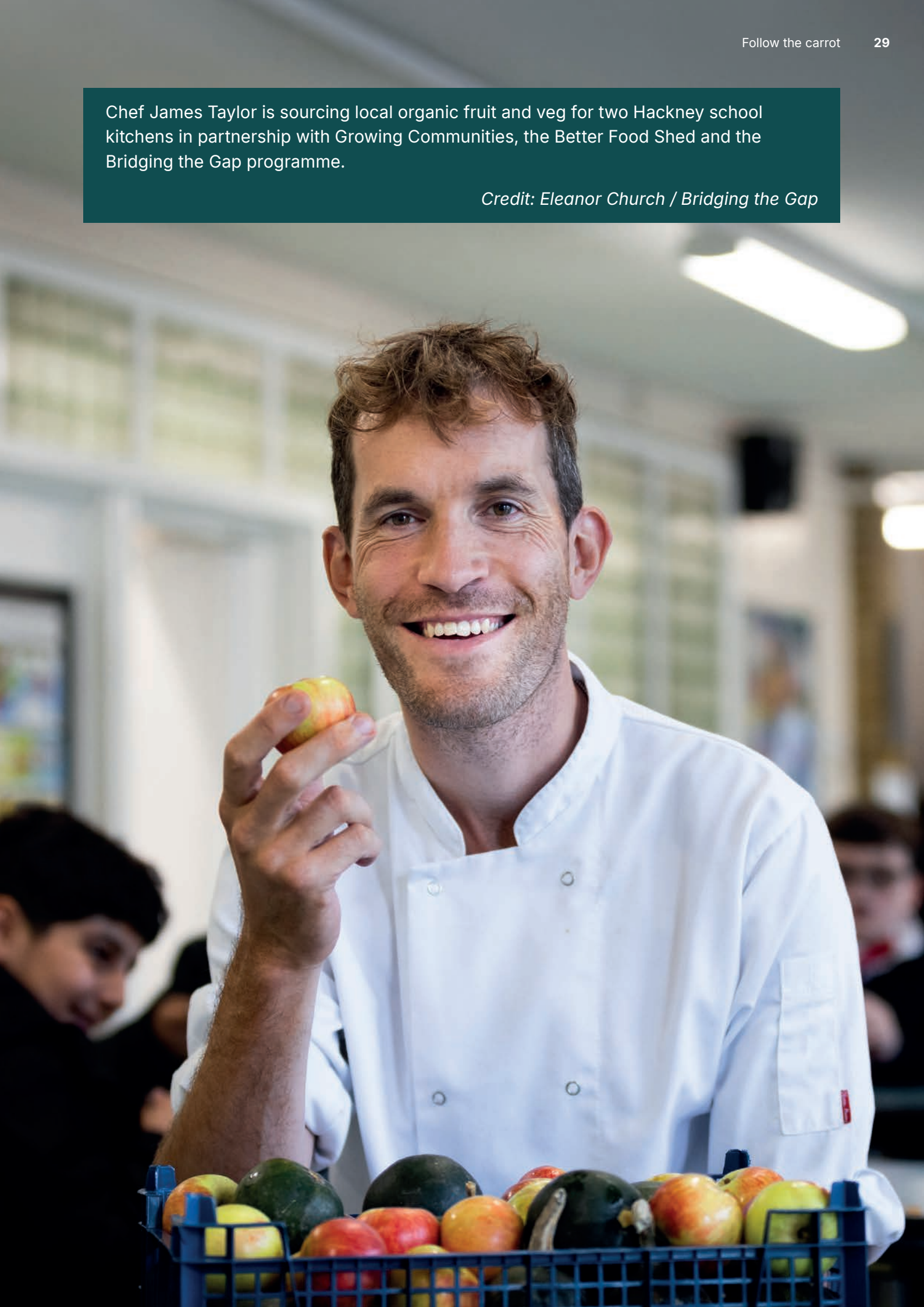
# Conclusions and policy recommendations

This research highlights the significant health, sustainability and economic growth potential for UK food and farming linked to FSM expansion in England, contingent on sufficient support and incentives being implemented across the system.

Now that school meal uptake is set to rise significantly following the Government's announcement to expand FSM to all UC households, it is imperative that the 'Conditions for Success' presented in this report are addressed. Doing so will help the sector unlock economic opportunities and better support UK producers supplying into school food supply chains. We therefore present the following policy recommendations:

| **1. Unlock economic growth for UK producers and supply chains by continuing to expand FSM eligibility as part of a roadmap to universality** | **Departments responsible** |
|---|---|
| • Continue expanding FSM eligibility in England (and across the UK) as part of a roadmap towards universal healthy and sustainable school food provision | DfE, DHSC, HMT |
| • Recognise FSM as a cost-effective investment in domestic food production and supply chains, as well as children's health, education in addition to being cost saving to families | DfE, DEFRA, DHSC, HMT |
| • Automate FSM registration to ensure all entitled children receive meals, thereby maximising take-up and return on investment | DfE, DWP, Cabinet Office (Digital, Data and Technology), DLUHC, HMT |
| **2. Improve food quality and sustainability in schools by strengthening standards, enforcing compliance and applying clear accountability measures** | **Departments responsible** |
| • Use the ongoing School Food Standards (SFS) review to:<br>◦ improve children's health through increased consumption of fibre rich foods such as fruit, vegetables, beans, pulses and other legumes<br>◦ encourage climate-friendly menus and 'less and better meat' e.g. replacing the requirement for meat to be served 3 days per week in schools with a requirement that supports inclusion of plant-based proteins | DfE, DEFRA, DHSC |
| • Introduce a national mechanism to enforce and monitor the School Food Standards in all schools, with Ofsted oversight, clear accountability, and transparent reporting | DfE, Ofsted, DHSC |

| 3. Support a stronger, fairer school food system by reforming funding to reflect the real costs of quality meals and investing in local supply chain infrastructure | Departments responsible |
|---|---|
| • Review and reform school food funding to reflect the true cost of delivering sustainable and nutritious meals, including food, labour, workforce and skills development, and local infrastructure | DfE, HMT |
| • Schedule regular funding reviews to keep pace with inflation and food price changes | DfE, HMT |
| • Provide centrally designated capital investment for kitchen and supply chain infrastructure (such as regional preparation hubs) that supports local and regional supply networks and sourcing | DfE, HMT, DLUHC |
| **4. Scale up proven models that benefit British producers and communities by investing in local procurement, evidence and innovation** | **Departments responsible** |
| • Recognise best practice in production and local, sustainable and British procurement across the UK, and provide multi-year investment in further innovation, replication and scaling of successful models | DEFRA, DfE, DBT, HMT, UKRI, Innovate UK |
| • Fund and incentivise dynamic procurement models and frameworks that support local, sustainable and British sourcing, shorten supply chains and enable participation from British producers and SMEs | DEFRA, DfE, DBT, HMT |
| • Enhance support for school food procurement leads to align contract and catering arrangements with delivery of the School Food Standards and Government Buying Standards Framework | DfE, DEFRA, Local Authorities |
| **5. Maximise the impact of public food spending by embedding school and public sector food in joined-up strategies across food and farming, health and the economy** | **Departments responsible** |
| • Ensure school and public sector food are fully represented throughout the food strategy | DEFRA, DfE, DHSC |
| • Update Government Buying Standards to align with the target for 50% local or sustainable sourcing, and apply these mandatory standards consistently across the whole of the public sector, including schools | Cabinet Office, DEFRA, DfE |
| • Set clear definitions and metrics to increase traceability of public sector food spend and enable effective measurement against targets | Cabinet Office, DfE, DEFRA, HMT |
| • Closely align frameworks and strategies across horticulture, land use, health and local growth plans with UK commitment to maximise local, British and sustainable production in public sector food procurement | DEFRA, DHSC, DfE, DLUHC |
| • Create a cross-departmental function with a clear mandate to coordinate public sector food policy and unlock shared outcomes | Cabinet Office, No.10, DfE, DEFRA, DHSC, HMT |



Chef James Taylor is sourcing local organic fruit and veg for two Hackney school kitchens in partnership with Growing Communities, the Better Food Shed and the Bridging the Gap programme.

*Credit: Eleanor Church / Bridging the Gap*

# The school meals opportunity for UK food and farming: Additional case studies

## Full of beans: British beans in school meals

- *Breaking down dietary barriers by making beans attractive and accessible*
- *Educating school children through immersive food-based activities*

Beans and pulses are enjoying a boost in popularity thanks to their status as a nutritious, sustainable and affordable protein source.

Their versatility means beans are attractive to caterers both as a base ingredient in a variety of recipes like dal and hummus, and to partly or entirely replace meat in dishes such as stews and bolognese.

Yet there are barriers to scaling up the use of beans and pulses in school menus.

- School Food Standards in England[48] require a portion of meat or poultry to be served on three or more days each week.
- There are socio-cultural barriers to overcome where children may struggle with the taste and texture of plant proteins and express a preference for familiar, more palatable (and often unhealthier) foods.

Producers face their own set of difficulties. A growing number of farmers are growing beans and pulses as 'bi' or 'cover' crops. These crops are used as part of regenerative faming systems thanks to their ability to fix nitrogen in the soil. However, consumer markets for UK grown beans and pulses are not well established so these are often ploughed straight back into the soil.

Researchers based at the University of Oxford have been testing how growing, supplying and eating UK-grown beans could contribute towards a more sustainable, healthier food system that supports producer livelihoods.

The BeanMeals project[49] ran from June 2022 to November 2024 and followed a food system approach.

- **Stage one** saw researchers at the University of Warwick develop two entirely new types of bean, Capulet and Godiva, that are quick-cooking and suited to grow in UK conditions.
- **Stage two** involved creating demand for the beans in schools.

Bean-based meals were introduced to the lunch menu at six schools across Leicestershire with children also taking part in cooking and food growing sessions. Teachers, midday supervisors and school cooks received training and classroom materials from Soil Association Food for Life to boost their knowledge around cooking with beans, while a BeanMeals engagement officer worked with the pupils to create excitement about trying unfamiliar foods. This included the use of fun learning materials to bring the food system alive, such as a board game, Beantopia, co-designed with the children.

Researchers found these measures helped grow excitement around beans as a lunchtime option both as an accompaniment and as a replacement for meat. They also learned the importance of consulting pupils about food choices and ensuring school

menus are flexible enough to make them appealing to children from a range of food cultures.

> *"BeanMeals highlights the power of a whole-school approach to healthy sustainable food and the key importance of actively involving pupils and school staff throughout the process. The fun and engaging activities increased children's curiosity about food, and they were then more willing to try new and unfamiliar foods."*
>
> **Professor Charlotte Hardman, University of Liverpool**[50]

## The benefits of bite-size contracts

- *Dynamic procurement offers flexible market access to SMEs*
- *Sourcing locally can deliver cost savings*

Small and specialist food producers face a host of barriers if they want to access public sector contracts. These range from rigid contract specifications to a lack of access to distribution networks that can effectively lock them out of value chains.

Dynamic food procurement (DFP) systems can remove some of these barriers by giving SMEs greater flexibility in how they bid for contracts. This involves breaking down large contracts into individual lots so local producers can bid to supply specific products rather than the entire contract.

A pilot of DFP in local schools by Bath and North East Somerset Council allowed local businesses to tender for the supply of fresh meat, fruit and vegetables. Analysis found the contract delivered 6% savings by using local produce such as cavolo nero sourced from nearby Bath and replacing more expensive cuts of meat like free range chicken breast with organic chicken thigh.

In 2024, the Crown Commercial Service – the UK Government's main procurement arm – launched a 'Buying Better Food and Drink' agreement[51] with the aim of integrating dynamic procurement principles into public sector food procurement. The agreement has the potential to create a more open marketplace, allowing specialist producers to compete on a level playing field with larger, more established suppliers.

## Swapping back to British potatoes

- *Rewiring a model that favours cheap, processed foods*
- *Using buying standards to incentivise local, sustainable produce*

One of the unintended consequences of the current school food system is that caterers are incentivised to source frozen, highly processed mashed potato from continental Europe rather than buying locally grown, nutritious potatoes and preparing them fresh in the kitchen. We heard this directly from one local authority caterer during this research.

This isn't the fault of schools or their caterers but the result of an economic model that values price over quality and nutrition and pushes labour costs onto producers and processors.

The UK has an ideal climate for growing potatoes, yet the area of land sown for their production has fallen by almost a fifth in the past decade, according to DEFRA's

latest food security report.[52] Mandatory procurement standards, coupled with an expansion in eligibility for FSM, could give schools the incentive to source locally grown potatoes, providing a triple win for UK growers, children's health and the environment.

## The power of peas

- *Working with multiple stakeholders to get nutritious, local ingredients onto school menus*
- *An end-to-end engagement strategy spanning farmer knowledge-sharing events to classroom visits*

In Scotland, Aberdeen City Council is working alongside a range of partners including chefs, buyers and standards bodies like Soil Association Scotland to create a market for organic Aberdeenshire green split peas.

The 'Give Peas a Chance' initiative is piloting the use of green split peas in school meals via the council's catering service, which provides 11,000 meals a week to over 50 schools across the city.[53]

It is being supported by Bridging the Gap, a Sustain-led programme to make organic fruit and vegetables accessible to people on lower incomes.

A discount of 36% is applied to the peas at the point of purchase from the farmer to cover the price premium for buying organic.

The pilot, which runs until June 2025, includes menu development to create new pea-based recipes, educational resources and classroom visits, and a producer engagement and knowledge-sharing event for farmers.

## Growing relationships with school chefs

- Proving the business model for *sustainable, in-house catering*
- *Chefs are a vital link between growers and eaters*

School chefs have a key role to play in taking fresh produce sourced from local suppliers and turning it into delicious, nutritious meals made from scratch.

The Chefs in Schools charity has supported The Totteridge Academy in Barnet, North London to create and run a sustainable in-house catering model.[54]

The process began in 2019 with the recruitment of head chef, James Fox, following which Chefs in Schools helped James and his team find suppliers for fresh vegetables, meat, fish and other produce, including regenerative flour from Wildfarmed.

Totteridge also benefits from its relationship with Grow, an agroecological farm co-located with the school that supplies fresh produce including fruit, vegetables and herbs, and runs training and educational programmes for the school and local community.

All meals are now cooked from scratch with a focus on creating great-tasting, colourful plates designed to be inviting to the students.

## Catch of the (school) day

- *Turning undervalued seafood into healthy, sustainable meals*
- *Using school food as a platform for innovation and education*

The Plymouth Fish Finger is that rare combination of an initiative that delivers for the local economy, public health and

Moray Council school caterers are using organic dried split peas in school meals.
*Credit: Moray Council*

the environment. It's also an example of how a dysfunctional value chain can be reimagined through collaborative working.

The project set out to find a local market for fish species that have traditionally been undervalued to the extent they are either discarded at sea or used as bait by crabbing fleets.[55]

A broad coalition of partners, from local fishers and businesses to the city's university and schools, have come together to pilot a model whereby catches of pouting, dogfish and whiting from small day boats are hand made into fish fingers and served for lunch at local schools.

Following a co-design phase in spring 2024, the group ran a series of pop-up educational taste-test sessions in five primary schools throughout January and February of this year with support from local school meals provider CATERed.

The ambition is to make these fish fingers available in a small number of schools from the autumn before rolling out to more schools over time once production processes have been successfully scaled.

> *"Our ultimate aim is to get our product into the local school meal system, via our school meal provider so the city's children can also benefit, not just by eating it, but by learning about it too."*
>
> **Clare Pettinger, Associate Professor, Public Health Dietetics, University of Plymouth**[56]

# Appendix

## Defining our parameters

### Terminology

We are mindful of the tendency to conflate "local" and "sustainable" in public sector food sourcing and note that this research does not analyse either in detail. Instead, we have taken a macro view, focusing on the broader economic impact of increased school meal consumption for UK farmers and food producers.

Other research provides deeper insight into how this commitment could shape public food procurement and unlock opportunities for healthier, more sustainable diets.[57] To make meaningful progress, policymakers must clearly define and implement these concepts when setting and delivering targets.

## The reality of school food purchasing

Our calculations use current catering purchase data, not farmgate or wholesale pricing, and therefore reflect the increasing use of ingredients arriving pre-prepped as opposed to whole, raw forms. The data on volumes and cost reflects the added economic value generated at different stages of the supply chain, including by producers, processors, and wholesalers. It's also worth highlighting the distinction between minimally prepped fresh produce and highly processed items in this context.

Whilst our focus is on illustrating opportunities for UK food and farming, we acknowledge the complexity of modern school food value chains, where pre-prepared food (e.g. pre-baked potatoes) has become increasingly common. We account for this reality in our analysis, whilst also advocating for greater use of whole ingredients and scratch cooking in school kitchens where feasible.

## Food waste

Food waste in public sector catering is substantial, with preparation losses significantly impacting ingredient volumes. For example, up to 40% of broccoli weight can be lost through stalk removal, while potatoes represent 21% of total food waste in the hospitality and food service sector.[58] The figures presented in this report are based on catering data showing total volumes purchased and served, which inherently include some level of food wastage incurred during processing and preparation, even if 'minimally processed'.

Although this project did not set out to explore waste in detail, it is important to recognise its significance, particularly when considering its implications for lost value in the supply chain.[59] Potential solutions include contractual requirements on buying local and seasonal; specifying menu and portion controls; requiring demand forecasting; mandating surplus redistribution and composting and; setting performance monitoring and penalties. Others have explored these in more depth[60], with some organisations already implementing measures to reduce waste in school catering.

## Additional assumptions and considerations relevant to this research

- **Domestic procurement:** Increasing the volume of UK-grown produce in school meals is beneficial over relying on imported produce.
- **Supply capacity:** British growers have the capacity to increase production, given appropriate market signals and incentives.
- **Market signal:** Farmers require clear demand signals before making investments in capacity expansion (e.g. orchard conversions or significant capital purchases are unlikely without guaranteed demand).
- **Diversification opportunity:** There is potential for switching from imported produce to domestic equivalents (e.g. apples instead of pineapples, carlin peas instead of chickpeas). This would require a different research question.
- **Production capacity:** Assume production volume can increase without displacing supply to other customers, and that producers can respond to changes in demand.
- **Price stability:** Assume the price per meal and the cost of production remain constant.
- **Linear relationship:** Assume that any increase in uptake (whether FSM or paid) has a linear uplift effect on UK production.

## Methodology

### Calculating school meal demand uplift under 3 FSM expansion scenarios

***Step 1:*** **Define the policy scenarios**

We modelled three scenarios:

1. Expanding FSM to all children on Universal Credit (UC)
2. Expanding FSM to all primary pupils (Universal Primary FSM, or UPFSM)
3. Expanding FSM to all pupils in primary and secondary (Universal FSM, or UFSM)

***Step 2:*** **Establish current baseline**

We started with an estimate of the current total school meals served per year, based on:

1. The number of pupils currently eating school meals each day
    a. Combining meal take-up for FSM pupils and UIFSM pupils across England.
    b. Assuming 40% of remaining pupils paying for meals (rest bringing food from home)
2. Multiplying this total by the number of school (meal) days per year (190 days)
3. Rounding to the nearest 100,000, this gave us a **baseline of 1 billion meals served in schools in England per year.**

### *Step 3:* Estimate the number of new meals for Universal Credit FSM expansion

For each policy scenario, we estimated how many more pupils would become eligible for FSM.

1. First, we took the government's estimate of 620,000 newly eligible pupils in the first year[61]
2. Factored in those 40% likely to be paying for meals currently (i.e. deadweight) by assuming 60% net newly eligible pupils: 372,000
3. Multiplied this number of pupils newly taking meals by 190 school days to get the number of new meals per year: 70,680,000
4. Worked this out as a percentage of current meals to determine the % uplift in meals per year: 7%

### *Step 4:* Estimate the number of new meals for Universal Primary FSM expansion

1. First, we took the total state primary headcount and rounded to nearest 100,000: 4,500,000
2. Totalled the number of current FSM and UIFSM pupils in primary, and took this from the total headcount to get the number of pupils who would be newly eligible
3. Factored in those likely to be paying for meals currently (i.e. deadweight) by assuming 60% net newly eligible pupils: 1,133,258
4. Multiplied this number of pupils newly taking meals by 190 school days to get the number of new meals per year: 215,319,021
5. Worked this out as a percentage of current meals to determine the % uplift in meals per year: 22%

### *Step 5:* Estimate the number of new meals for Universal FSM expansion

1. First, we took total pupil headcount rounded to the nearest 100,000: 9,000,000
2. Applied assumed take-up of 90% under a universal meals policy to estimate the number of pupils taking school meals
3. Multiplied this number of pupils taking meals by 190 school days to get the total number meals per year: 1,539,000,000
4. Worked out the difference between this and the current baseline of 1 billion meals per year, to calculate the uplift % on current baseline: 54%
5. Note that paid meal deadweight was already factored into the baseline so wasn't factored in again here.

### *Step 6:* Summary of uplift % for all 3 scenarios

1. UC scenario: +7%
2. UPFSM: +22%
3. UFSM: +54%

The government estimates that around 620,000 additional children in England could become eligible for free school meals in the first year of the Universal Credit expansion.[62] A lower headline figure of 500,000 is often quoted, reflecting the average number of newly eligible children per year in the longer-term.[63] However, many children currently receiving free school meals do so under transitional protections, which are due to end. Once these protections expire, more pupils will become newly eligible under Universal Credit. Many non-government organisations therefore believe these figures are conservative and that the true scale of increased eligibility may be higher.

The actual uplift is therefore likely to exceed our estimates, but we have used government-reported estimates for conservatism. Additionally, we have assumed that around 40% of these newly eligible pupils are currently paying for school meals – but given that the most disadvantaged families are less likely to be paying for school meals now, this assumption may underestimate the level of uplift resulting from expansion to children in Universal Credit households.

Our method does not include pupils in post 16 further education settings FSM claimants, although around 90,000 are currently claiming free school meals in that group. We consider this missing figure is likely to be balanced out by lower paid meal take-up in secondary schools in our estimates of uplift for UC and UFSM scenarios.

All figures are based on multi-layered calculations using a range of government and non-government datasets. As paid meal take-up has not been measured for over a decade, our estimates rely on informed assumptions and feedback received from school food operators interviewed in our research. These figures should be seen as a robust indication of the scale of opportunity, rather than a precise prediction.

## Calculating what these uplift opportunities mean for our focus ingredients

***Step 1:*** **Estimate current baseline spend and volume**

1. Aggregated the total spend and volume per ingredient across all British-sourced minimally-processed SKUs from three catering datasets provided to calculate average price per kilo, and average spend and volume per meal for carrots, potatoes, broccoli and beef.
2. Scaled these figures to estimate total spend across one billion meals in England, based on current meal uptake and purchasing patterns.

***Step 2:*** **Uplift under FSM expansion scenarios**

- Applied estimated percentage uplifts for each scenario to the baseline spend and volume, illustrating the potential market opportunity under each level of FSM expansion.

We recognise that sourcing and purchasing behaviours vary significantly between caterers across England. Our analysis was constrained by the data provided, requiring us to base calculations on this dataset and apply assumptions about its representativeness of the national picture. The difficulty in accessing catering and purchasing data reflects the broader lack of transparency in the school food system, a challenge also highlighted in several stakeholder interviews.

## Calculating the 'Maximum British Plate' opportunity

### *Step 1:* Baseline serving volumes

1. Used recommended portion sizes and serving frequencies for carrots, broccoli, potatoes, and beef (plus other proteins) from the School Food Standards[64] to estimate potential spend and volume per meal.
2. Assumed full domestic sourcing for these ingredients, representing the potential uplift if British procurement was maximised in schools.

### *Step 2:* Scaling to current meal volumes

1. Scaled serving volumes and frequencies to one billion meals per year, reflecting current meal uptake.
2. Multiplied these volumes by average spend per kilo from original British ingredient purchasing data to estimate the maximum British spend for the current number of meals.

### *Step 3:* Uplift under FSM expansion scenarios

- Applied estimated percentage uplifts for each scenario to the maximum British plate baseline spend and volume, illustrating the market opportunity for each ingredient under different levels of FSM expansion.

Whilst the baseline for beef was calculated, the uplift opportunity is presented as a shift toward scaling up plant proteins, including beans, alongside replacing imported beef with British beef as part of a 'less, better and British' meat sourcing approach.

# Endnotes

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# Follow the carrot

## Can free school meal expansion boost the UK food and farming economy?