



School catering at a crossroads

How do you navigate
it to deliver food
that works?



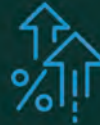
Primary school catering in the UK is usually judged through outputs:



Meals served



Standards met



Uptake recorded

These three measures all matter, but they do not capture the conditions schools now face to deliver them, nor the pressures they need to absorb to keep catering stable day to day.

In October 2025, Juniper Ventures conducted a research study of 100 schools to understand how schools approach catering provision, the factors that influence choice of model, and the constraints leaders are balancing around cost, quality and reliability. We combined this with school leader interviews and wider sector research to understand the current primary school catering landscape.

From this a consistent picture emerges: catering is broadly working, pupils are being fed safely, nutritional standards are being met, and most schools describe their provision as dependable rather than failing.

School catering isn't broken but the environment in which we're operating has changed and the cracks are beginning to show:

- Ongoing inflationary pressures mean costs have been reset at a higher level
- Expectations around nutrition, compliance, sustainability and pupil experience have increased
- Recruitment and retention of employees is more fragile
- There is less flexibility in budgets and staffing models to accommodate these shifts

For school leaders, the practical question they're asking has changed from:

“Are we happy with the service provided and is the food good?”

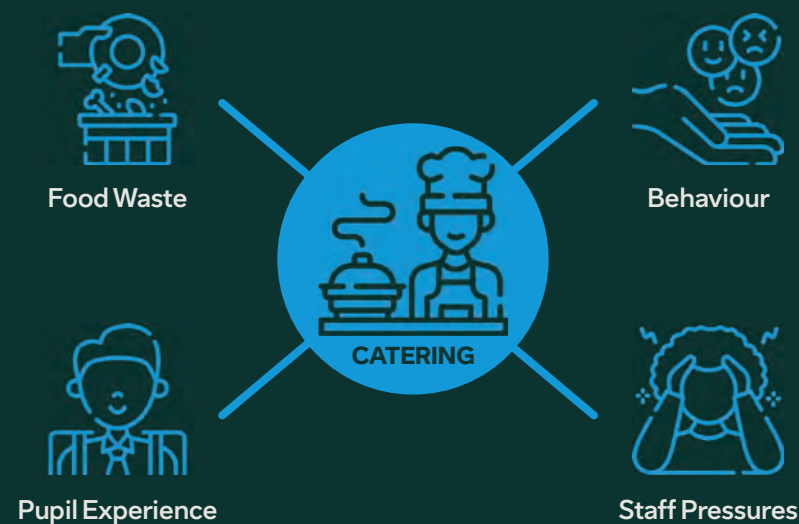
to

“How do we continue to provide this service and at what cost?”

Catering has become one of the few areas where small changes, made quickly, ripple into pupil experience, behaviour, waste and staff pressure. Where a decision made to relieve one constraint, can unintentionally tighten another.

This paper sets out why that is happening, where the real pinch points are, and how schools can make safer, evidence based decisions in a system with limited flexibility.

The aim of this paper is not to promote a single solution or delivery model. We want to encourage a more honest, practical conversation about what it now takes to deliver school food that genuinely works, and what needs to be true for this to be sustainable.




The impact for school leaders

When catering becomes unstable, the consequences are often felt quickly in areas that can't be ignored: pupil wellbeing and behaviour, staff workload, parent confidence, safeguarding and compliance, and the school's overall ability to run a well-organised day.

What makes this even more challenging, is that the pressure is rarely caused by one issue; with the untended consequence of fixing one issue being that you cause another.


This is why insight is crucial not only in identifying the issues, but in deciding how to tackle them.

One great example is pupil voice. When you understand what is driving choices and waste in your setting, you can make smaller, safer adjustments that protect stability and avoid costly disruption.



“Pressure does not mean failure. It means is that the system now has very little room for error.

Michael Hales | Chief Executive Officer, Juniper Ventures

A woman in a white shirt and dark apron is smiling as she serves food on green trays to a line of students in school uniforms. The students are looking down at their trays. The background shows a large school cafeteria with many other students seated at tables. The text is overlaid in the center of the image.

**Catering works,
but the system around
it has changed...**



What schools are saying

Juniper's research indicates that most schools rate their catering provision positively. They describe it as a dependable part of the school day that provides routine, familiarity and care for pupils.

This baseline is important. Whilst much of the public narrative frames school meals as being in a state of crisis, schools themselves tend to describe something more complex - provision is holding up, but only because teams are managing to work within tighter constraints than before.

Over recent years, the cost base of school catering has shifted in ways that appear structural rather than temporary. Ingredients central to healthy school meals remain expensive. Labour costs have risen alongside the broader cost of living and there's increasing competition for staff. Requirements around compliance, allergen management and safeguarding remain rightly high, but they carry an ongoing operational cost that does not reduce when wider inflation cools.

At the same time, there's an expectation for school meals to do more, whether through supporting wellbeing, improving nutrition, reducing waste, meeting sustainability goals, or staying appealing to pupils whose expectations continue to evolve.

When looked at catering in this context, it can be functioning well and still feel exposed. With minimal spare capacity, a small disruption to staffing, a modest shift in uptake, or a change to menus or portions can trigger knock-on effects across service consistency, pupil behaviour, waste levels and cost control.

Catering is not broken, but many schools are operating closer to the edge than they were or want to be..

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Schools are not asking for perfection. They are asking for services that hold steady under pressure.

Philippa Terry
Chief Operating Officer, Juniper Ventures



**The financial tension
schools are
facing every day**

School leaders rarely describe catering challenges as a single issue, because the levers are connected.

Uptake influences production volumes and staffing hours. **Staffing** affects consistency and service flow. **Service consistency** affects pupil trust and behaviour, which in turn affects uptake. **Waste** sits inside the same system, shaped by portioning, time pressures, menu appeal, and the realities of the school day rather than by food quality alone.



One of the most persistent tensions sits at the heart of funding. There is an assumption that higher uptake automatically improves financial sustainability. However, schools repeatedly describe situations where **increased uptake does not relieve pressure** in a way that supports such assumptions.



The reality for many schools is that the funding available for school meals does not reflect the true cost of delivery. The current funding rate of £2.61 per meal is set against food, labour, compliance and operational costs that have risen structurally over recent years.



As a result, many schools are subsidising their school meal service by thousands of pounds each year, absorbing the difference between funding and the real cost in order to keep provision stable, compliant and accessible to pupils.

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For many schools, the issue is not ambition but funding. When reimbursement rates fall behind the real cost of food, labour and compliance, schools absorb the gap. If we want stability and standards funding has to reflect reality.

Pat Fellows MBE, JP, FIH
Consultant in School Meals

The consequences of using a school's budget to stabilise catering

For school leaders, subsidising catering operations creates a difficult trade-off. Protecting meal quality, staff stability and pupil experience can mean drawing resource away from elsewhere in the school and from other parts of a child's education, and whilst the solution suggested is often to increase uptake, this doesn't always ease financial pressures.

The challenge of increasing uptake

Where reimbursement mechanisms do not track real delivery costs, more meals served can result in a higher ingredient spend, additional staffing hours and greater operational demand. All without a proportional increase in income.

This is where the conversation can become uncomfortable, moving it beyond operational efficiency to structural mismatch. Schools are being asked to deliver high-quality meals, reduce waste, meet rising expectations and maintain compliance, all while quietly absorbing cost pressures that are not fully recognised in the funding framework.

The resulting impact is not because of poor decision-making. What we're seeing is pragmatic leadership within a constrained system, where trade-offs are unavoidable and where "doing the right thing" can carry real financial consequence.



A photograph of several students in school uniforms sitting around a table, eating lunch. The image is dimmed with a dark blue overlay. The text is centered over the image.

A system under strain, regardless of the delivery model

The pressures described in this paper are echoed across the wider school food sector.

What is notable is that these constraints show up across delivery models. Schools running catering in house, local authority providers and external operators all report similar structural pressures, even when operational approaches differ.

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Costs, staffing and rising expectations are felt everywhere. From a nutrition perspective, the focus has to be on maintaining consistent, reliable provision for pupils.


Robyn Hume
Registered Dietician & Nutrition Coach

This points to a shared context: a system where the standards are clear and the intent is strong, but where the operating conditions make stability harder to maintain.

In this scenario, there's often a need for school leaders to reframe the question.

The decision now is rarely **“which model is best in theory?”** and more often **“which approach fits our capacity, protects service stability, and gives us the best chance of staying compliant and consistent over time?”**



A person wearing a black uniform and cap is working in a kitchen, possibly preparing food. The image is overlaid with a semi-transparent dark green filter. The text "People make catering work, and people are under strain" is written in white, bold, sans-serif font across the center of the image.

**People make
catering work,
and people are
under strain**

When the topic of school food comes up, attention often focuses on menus

In practice, schools repeatedly point to people as the biggest factor in determining whether catering holds up under pressure.

Stable catering teams are not interchangeable resource. They understand routines, know pupils, anticipate pinch points in the day, and bring calm to one of the most pressured parts of school life. Where teams are stable, schools report fewer issues with service delivery and fewer behavioural challenges around lunch.

Where turnover rises, the consequences appear quickly, because;



Inconsistency affects



Service flow



Service flow affects
pupil experience & uptake



Uptake affects both
nutritional outcomes & cost pressure

This is more than a workforce issue. It's a quality & resilience issue that sits at the heart of sustainable catering operations



In a labour market where recruitment and retention are increasingly difficult, catering roles often compete with sectors able to offer higher pay, different hours or greater flexibility, leaving schools and providers to manage fragility in staffing that can undermine even well-designed operational plans.

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Catering teams aren't interchangeable. They know routines. They know pupils. They bring calm to busy parts of the school day.

Michael Hales
Chief Executive Officer, Juniper Ventures

A group of school pupils in a canteen, laughing and eating. The image is overlaid with a dark blue tint. The pupils are wearing school uniforms, including blazers and ties. They are seated at long tables with plates of food and trays. The background shows other pupils and a bulletin board with various notices and posters.

The importance of pupil voice

Several schools told Juniper that decisions about menus, portions and service delivery are often made with limited structured feedback from pupils.

This is particularly true in primary settings where gathering input is often difficult to do well. In a system under pressure, this lack of insight matters. Assumptions made become expensive with the cost showing up as waste, disrupted service, reduced uptake, or in staff time spent reacting to problems rather than preventing them.



The DigiTally School Food Waste Challenge

The DigiTally School Food Waste Challenge is a structured programme designed to help schools understand and reduce food waste by actively involving pupils in the process. Rather than focusing on measurement alone, the challenge captures pupil voice in an age appropriate and structured way, asking children not just what was wasted, but why. Pupils are able to distinguish between food they disliked, food they wanted to finish but felt rushed, as well as portions that did not match appetite.

This distinction is operationally valuable. It prevents schools from treating all waste as a failure of the menu and instead allows them to identify changes that will make an impact, be that portion calibration, service flow, time allocation, or targeted menu adjustments.

The impact also goes beyond reducing food waste. When schools can see what is driving pupil choices, they are less likely to resort to large disruptive changes that carry risk. Instead, they are more likely to make incremental adjustments that protect the stability of their catering operations and improve outcomes.



“ Food waste in schools is rarely random. When you listen to pupils, the reasons are clear and actionable. That clarity allows schools to make precise, low-risk changes that improve both uptake and waste without disrupting what already works.

Patrick McDermott | Chief Executive Officer, DigiTally

A group of children are gathered around a table, holding bowls of food. In the background, a sign reads "SNACK STATION" and "DON'T GO HUNGRY HELP YOURSELF". The scene is dimly lit with a teal overlay.

Beyond school lunch:
Wellbeing, readiness
and responsibility


School catering increasingly sits within a wider set of expectations around pupil wellbeing and readiness to learn.

Sector evidence and school experience consistently indicate that a significant number of pupils arrive at school hungry, tired or unsettled, particularly in communities facing sustained financial pressure. Schools often see food provision, including breakfast, as part of how they support behaviour, concentration and engagement in the classroom.

This context is important when making catering decisions, because school food is no longer judged simply on lunchtime compliance. It is increasingly viewed as part of a wider support system across the school day; expanding expectations further in an already tight operational and funding framework.

Recognising this expanded role is not about asking catering teams to take on additional responsibility. It is about understanding the pressures already placed on the service and the limits of what this service can absorb without structural support.



A photograph of a plate of food, including two whole oranges with green leaves and a portion of white rice, is shown. The image is overlaid with a dark teal background. The text "Choosing a catering model that works for your school" is written in white, bold, sans-serif font across the center of the image.

**Choosing a catering
model that works
for your school**

Choosing the right school catering model

Discussions about catering models can slip into implied hierarchies as though one approach is inherently superior. Schools' experience tends to be more pragmatic.

Some schools manage catering fully in house



supported by experienced teams and strong local knowledge.

Other schools choose managed catering services



to reduce operational burden and protect leadership capacity.

Many adopt hybrid approaches retaining local control



while drawing on external expertise for specific needs such as compliance checking, nutritional assurance or structured pupil insight.

In each case, the core question is rarely whether the school understands what good catering looks like. The more pressing issue is whether the school has the capacity to oversee the chosen approach consistently, particularly when staffing and cost pressures are already stretching leadership bandwidth.

There is no single correct model

The model selected works when it is aligned with the school's capacity and the outcomes that they want to achieve are prioritised, especially service stability, compliance and pupil experience.

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A catering model succeeds when it matches a school's capability and capacity to oversee it. Without that alignment, even a strong structure can falter.

Rachel O'Grady MBA, FIC
Founder & Director of Consultancy,
RIVA Partnership



A photograph of a child sitting at a table, eating a meal on a blue tray. The child is wearing a light-colored shirt and is using a fork to eat. A yellow cup is visible on the table next to the tray. The background is slightly blurred, showing other people at the table. The text "A practical lens for school leaders" is overlaid in white on the image.

**A practical lens
for school leaders**

School leaders told Juniper that one of the hardest aspects of catering decision-making is diagnosing where the pressure is coming from

This is particularly true when numerous constraints are at play. To support, the prompts below can be used to sharpen how schools diagnose these pressures, making operational decisions less reactive and more evidence-led.

Where does catering feel most fragile right now, and why does it feel more fragile today than last term?

Are decisions being driven by current insight from pupils and staff, or by habit and inherited assumptions about what “should” work?

Where is leadership capacity most stretched, and what support would genuinely remove pressure rather than adding an extra layer of oversight?

Is the current delivery model aligned with the level of attention the school can realistically sustain without erosion elsewhere?

Which outcomes need protecting first: stability and compliance, or a period of active improvement?

Used honestly, these prompts can help schools to separate structural pressures from operational issues and resourcing gaps. This level of clarity is often the difference between change that works and change that destabilises.

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The hardest part isn't fixing catering. It's seeing clearly where the real pressure sits, because without that clarity, even well-intended changes risk making things worse.

Michael Hales
Chief Executive Officer, Juniper Ventures



Conclusion: The need for a more honest conversation

School catering has always mattered and in the current climate it matters more. It carries greater weight and supports wellbeing, readiness to learn, staff morale, and the daily experience of pupils.

The challenge schools face is not a lack of commitment to catering. It is the practical question of how to sustain what works in a system where costs and expectations have risen, staffing is harder to stabilise, and there is less margin for error.

A more honest conversation about funding, capacity, people and trade-offs is essential. Alongside this, there needs to be a stronger commitment to evidence and pupil insight so that the changes schools make are targeted, proportionate and safer to implement.

The future of school catering will not be defined by a single model or a neat solution. It will be shaped by whether schools and partners can protect service stability, support the people doing the work, and make decisions rooted in real insight rather than hope and habit.

