

# Changing the

# NARRATIVE

# MANUFACTURERS



# Project overview

This resource is part of our Changing the Narrative project. It aims to create a stronger alliance for achieving more plants and less and better meat and dairy, helping to put Eating Better's Better by Half Roadmap into action. It creates the space and resources for our members to better advocate for changes to our food system, and to put forward a positive narrative on dietary change.

"The ambitious changes we need to see in our food system demand that we work collaboratively. Changing the Narrative allows us to be bolder in demonstrating how we can make change happen and the positive story to be told with dietary change."

## Andrew Stark

Senior Research and Policy Manager  
Eating Better

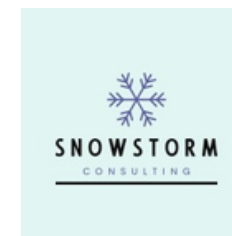


With thanks to:

## Steering group members



## Additional support by





# What this resource is and how to use it

This resource is for members of the Eating Better alliance and the wider food movement. It is intended to provide organisations with information and guidance on how to tailor their messages and outputs so they are able to work in a more constructive way with retailers on more plants and less and better meat, avoiding polarisation where possible.

Retailers, alongside manufacturers, are defined as individuals and organisations that are responsible for processing, packaging and distributing food products to citizens, such as shops, supermarkets and online stores.

This guide can be used in a number of ways; to inform alliance member reports and research, provide guidance for external engagements and campaigns, communication assets and contribute to more effective strategic planning on more plants, and less and better meat and dairy.



# What needs to change

Food and drink manufacturers are a significant factor in the UK economy. It is the largest sector of UK manufacturing. In 2023, the food and drink industry represented 20.8% of total UK manufacturers' sales ([ONS 2021](#)). This sector contributes £38 billion to the economy annually (GVA), has a turnover of £143bn and domestic sales of £125bn. 12,515 UK food & drink manufacturers employ 474,000 people ([FDF 2024](#)). The sector is dominated by larger organisations with 280 food and drink manufacturers having more than 250 employees.

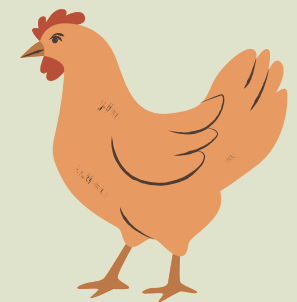
Food and drink manufacturers have a crucial role to play in supporting both public health and climate change targets, but they need systems in place to ensure the health and climate commitments they make are science-based and sufficient.

The fact that there is a dominance of a small number of large food and drink manufacturers means that the effects of their business practices have a significant impact. As part of their Fuel Us Don't Fool Us campaign, Bite Back name the top 10 global food and drink companies that sell products in the UK, Ferrero International SA, Mondelez International Inc, Unilever Plc, Kellogg Company, Mars Inc, Nestlé, PepsiCo Inc, The Coca-Cola Company, Kraft Heinz Co, and Danone are being responsible for a staggering 477 million tonnes of carbon dioxide equivalent emissions in 2022 ([Bite Back](#)).

## Better by Half Roadmap

For more info on the practical actions on what needs to happen, explore Eating Better's Better by Half [roadmap](#).

**The Better by Half roadmap shows actions to move us towards producing and eating less and better meat and dairy, creating a food system that is fairer, healthier and more sustainable for people, animals and the planet.**



# Effective language

Tailoring messaging to adapt to food manufacturers is key for positive engagement and breaking down barriers between alliance members and food manufacturers. Below are tips on what works well and what to avoid when engaging with, communicating about or researching food manufacturers and their role in healthy and sustainable diets.

Overarching considerations to build into strategies influencing the manufacturers are the following:



**Growth** - Anchor your language when influencing manufacturers in a message of growth. This can support the competitive nature of a manufacturer. This is opposed to the decline of sales or less-of certain products. This can mean more sales of much needed fruit and vegetables, that can increase fibre consumption and a healthier population. In a farming context, this can mean a boost of horticulture production, an area the UK is sorely lacking.



**Their ownership and business structure** - many of the largest manufacturers (for ready meal examples see Greencore, Samworth Brothers, William Jackson Food Group, Nomad foods) own a range of manufacturing sites and branded and own brand products. These sites and brands are sold between businesses to raise capital when needed.



**Who their main customers are** - When looking to influence all the retailer's ready meals, consider that there are ~3 manufacturers who produce the majority of these. Therefore, if you can influence them you will go a long way to influencing the retailers, if the retailer development teams are open to their proposals.

# Effective framings

Working out **who** you are talking to and **what they can influence**, and finding a route to **people with influence** over the specific action you're seeking, will be key.

Below are 3 further framings that work well and 3 to avoid, when influencing manufacturers:

## 3 framings that work well



Ask those working in manufacturing how civil society organisations can work in collaboration to support progressive businesses to achieve more success, from introducing less and better meat options as part of healthy and sustainability initiatives.



Explore what innovations are potentially feasible to create products that are affordable, healthy and sustainable. Look at potential for health by stealth and introducing more plant-based ingredients as part of the mix. One issue is that businesses perceive people as willing to pay more for plant based alternatives, so they are using these as a route to higher profit margins. The high prices therefore prevent scale. The business case is that by making them more competitively priced, they drive massive uptake, which in turn drives massive economies of scale and overall larger net cash profit.



Support food manufacturers with gaining board level buy-in to rewarding healthy and sustainable initiatives throughout the whole organisation which support a less and better meat lens. Find out what motivates the board and re-frame. For example, being less dependent upon meat is likely to reduce the business risk of carbon taxes or supply chain inflation, driving resilience.

## 3 framings to avoid



"All food and drink manufacturers are the same" i.e. all bad and aren't making any efforts to improve healthy and sustainable diets and reduce meat and dairy consumption. This is likely to alienate progressive businesses that would like to engage and improve the landscape but are hampered by a lack of level playing field. Acknowledge any good things you have seen come from the organisation. People need a bit of encouragement for their small wins!



"Food manufacturers already make good profits through meat-based products. Why aren't these profits being invested in developing products that would be priced so they are accessible to all customers, whatever their income level." Actually quite a lot of meat is very low profit, even loss making. So reducing the amount of meat in a prepared product in favour of using other ingredients is likely to reduce overall cost and increase profit.



"Food manufacturers have it easy". Do not underestimate the pressures that individuals within a food manufacturer face in order to return the expected level of profits. Rather than telling those working at a food manufacturer why what they are doing is wrong, listen to them and understand their key focus so you can relate your asks more effectively. Manufacturers producing on behalf of retailers may find it hard to shift the offer/product profile without having a constructive relationship with their client (the retailer).



# Examples of counter-arguments from manufacturers

## Example

We'd love to take more action towards improving healthy and sustainable products with less and better meat but we have a commercial risk at being a first mover. There is also a risk that shoppers don't buy the products when we do offer it.

## Response

Good opportunities exist to be seen as leaders both by industry peers and consumers. Investors are looking at the long-term viability of organisations and are more likely to invest in those making progress towards the market trends of healthier and more sustainable products.

We're caught in inertia within our manufacturing processes given the debate on UPFs and confusion around how healthy plant-based meat alternatives are and don't want to invest money until we have a better understanding of this landscape.

Engaging in the debate in a constructive way would be a good way to position your organisation at the forefront of knowledge and developments in this area. Additionally, this argument is only true for composite processed products, not actual fruit and vegetables, grains and pulses.

We are a commercial organisation, driven by profit and (in the case of PLCs) need to return a good shareholder dividend value to remain a competitive investment option. Investing in healthy and sustainable practices and alternatives to our current meat-based products is usually more expensive.

Embracing innovative approaches could potentially save money – particularly with opportunities to reduce Scope 3 emissions and also hit Net Zero targets.

Tapping into the skills renowned within the food industry for innovation, explore the potential for new recipe development which meets both healthy and commercially viable ingredients and processes.

# Preparing for 1-1 corporate engagements

Every meeting or engagement is different but it's worth making sure you're up to speed with the specific context and latest financial performance of the business you're working with. Whilst manufacturers have a lot in common they also have very different cultures, priorities & drivers:

- What specific public targets do they have in this space already? Which might align with/reinforce what you are looking for, and where are there potential trade offs?
- What legislative/regulatory requirements are they subject to, or will soon be subject to? Understanding the geographic scope of their operations - and which parts you seek to influence - is important for this.
- What are the specifics of their business model, in particular with regards to their supply chain? Some manufacturers will have more integrated supply chains and much closer relationships with their farmers and suppliers than others.
- What do their customers care about that is different to the population at large? Affordability is critical for most, but customer concerns can also differ.
- How can you support manufacturers in meeting disclosure requirements and setting actionable sustainability goals, e.g. by providing practical tools, best practice, case studies and expertise?
- Responsible investment is a growing sector – investors are increasingly looking for ways to align their portfolios with sustainable and ethical practices. What evidence and expertise can be leveraged to show that investment in less and better makes good business sense and provides a range of benefits for people and planet?



# Existing resources

This is a list of useful resources from members of the Eating Better alliance with expertise in the world of manufacturers:

Organisation	Case study
The Food Foundation	<a href="#"><u>State of the Nation's Food Industry report</u></a>
The Food Foundation	<a href="#"><u>Rethinking Plant-Based Meat alternatives</u></a>
Biteback 2030	<a href="#"><u>Fuel Us Don't Fuel Us</u></a>

For more info or questions, contact Andrew - [andrew@eating-better.org](mailto:andrew@eating-better.org)

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# Appendix

Images on the structure of manufacturers, provided by Susan Thomas, Snowstorm Consulting.



Potential Points of Disconnect	
1	Internal: Sustainability < > Commercial + other functions
2	Internal: Sustainability < > Exec Team
3	Internal: Product teams bypass Sustainability team
4	External: Supplier < > Retailer at all levels

Voice over to this diagram:

- Agreements (which drive standards, recipes, ranging etc.) are made between supplier and retailer executive and commercial teams.
- Sustainability teams on both sides may have various disconnects which mean their agenda is not well embedded in those agreements.
- Product development probably initiates from supplier marketing and supply chain/R&D team, and may or may not pass by the Sustainability team.
- In the case of Own Brand, specifications may originate from the retailer's product team and be passed on as requirements to bidders.
- If a retailer 'requires' certain specifications, the supplier will make it happen (sometimes by 'requiring' that specification from their own downstream supplier).



# Understanding supply chain relationships

