

**ZERO  
CARBON  
FORUM**

# **NET ZERO - THE GUIDE FOR THE BREWING AND HOSPITALITY SECTOR**

---

## **5 YEAR REVIEW**

**SUPPORTED  
BY**



# FOREWORD



**Mark Chapman**  
Founder and CEO

“ The ability to continue over time is the very definition of sustainability. Being a ‘going concern’ is the core responsibility of any business leader. Our sector has a long history of resilience, but the changing climate driven by our collective carbon emissions as well as continued cost pressures will require us to adapt if we are to continue to grow. With a third of global emissions coming from food and drink, we have a critical role to play in securing a future where we can continue to eat, drink, and celebrate together.

The good news for Brewing and Hospitality is that cutting carbon can also recover lost profits, helping to address the existential threats of climate and cost. Net zero businesses are more efficient in their use of energy, water and raw materials. They have stronger, more secure supply chains. They are better places to work, easier to invest in, and more appealing to customers. In short, this is not just the right thing to do, it is the smart thing to do.

The Forum was created to be the quickest, most cost-effective and impactful way for businesses to reduce emissions and build resilience. I’m delighted to share the progress we’ve made together over the last five years: halving electricity emissions and recovering over £5m of lost profits along the way. Our joint action on key ingredients such as dairy and beef is already delivering results. And our practical, business-first approach has brought more than 70 operators into the Forum, representing over 35,000 venues across the UK.

This progress has not gone unnoticed. We have won awards for our leadership and secured government support to expand our work, including funding this year to help measure and reduce emissions across 615 SME pubs, restaurants and hotels by tackling energy waste.

The next phase will accelerate the emissions reductions across our Supply Chain, build resilience to climate impacts and embed sustainability in the decisions of every function of our members. This review outlines the priorities and stakeholder support that will enable us to keep moving at pace and scale.

**The urgency is clear, and the opportunity is significant: a thriving, future-proof sector aligned with the needs of people, planet, and prosperity. By working together, we do more than meet our climate commitments - we accelerate our individual progress towards efficient, resilient brands that people love to invest in, work for and buy from.** ”

**Together, at pace.**

# EXECUTIVE SUMMARY

**Five years ago, the Zero Carbon Forum launched ‘Net Zero: The Guide for the Brewing and Hospitality Sector’, a roadmap and shared plan to help operators cut emissions, reduce costs, and build a more resilient future.**

Since then, our industry has faced extraordinary challenges: a pandemic, volatile energy prices, increased costs, and growing climate impacts. Yet through it all, Forum members have stayed the course, turning ambition into action and proving that credible climate action drives thriving businesses by improving efficiency, resilience and brand.

This five-year progress report reflects on what’s been achieved and what’s next.

Today, our community spans over

 **70 OPERATORS**  
**35,000 SITES**

working together to decarbonise faster and more efficiently than any one business could alone.

## EFFICIENCY

Members have achieved real results —

**52% ▼** **£5 million+**  
ENERGY EMISSIONS RECOVERED LOST PROFITS

### How?

- Reduced operational energy waste through initiatives such as **Save While You Sleep**
- Efficient equipment
- Transition from gas to electric



## RESILIENCE

By moving to regenerative producers, vertical farming and local sources, climate action is helping businesses to:



**Reduce exposure** to energy volatility and supply chain risks.

**Strengthen operations** in the face of increasing extreme weather.

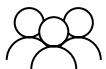
## BRAND

It’s also enhancing —



**Stakeholder loyalty** - customers, investors and employees choose businesses that can demonstrate their sustainability credentials or ‘credible climate action’.

**And Forum members are leading the shift** - through evidencing their actions to reduce emissions across their operations.



## COLLABORATION HAS BEEN KEY

From sharing data and best practice to developing consistent measurement and reduction tools. The next phase focuses on tackling supply chain emissions, shifting the food system, and designing circular, low-carbon operations.



## FIVE YEARS ON

The hospitality and brewing industry is proving what’s possible when we work together. The next chapter is about going further, faster and ensuring the industry is efficient, resilient, and trusted for generations to come.



# OUR PROGRESS

MEASUREMENT OF EMISSIONS AND ACTIONS HAS

**IMPROVED SIGNIFICANTLY**

- More members
- More measurement
- Increased reduction actions.



OVER



of Forum members have a footprint across all Scopes.



MORE THAN



of Forum members have year-on-year footprints.



MEMBERSHIP EMISSIONS

**7%** ▼

from actions taken across all scopes.



THAT'S A TOTAL OF

**825,000 TONNES OF CO<sub>2</sub>e**

per annum abated across the membership. Across the whole sector, that would be over

**2 MILLION TONNES**

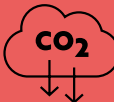


SCOPE 2 (GAS) EMISSIONS

**22%** ▼  
**200,000 TCO<sub>2</sub>e**

Achieved through:

- Behaviour change initiatives to reduce energy waste
- Transition to electric.



SCOPE 2 (ELECTRICITY) EMISSIONS

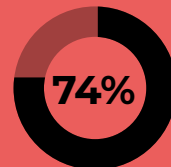
**52%** ▼  
**400,000 TCO<sub>2</sub>e**

Achieved through:

- Behaviour change initiatives to reduce energy waste
- Transition to electric
- Renewables.



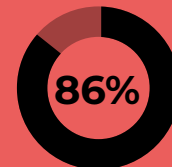
SCOPES 1 & 2 ACTION



of members have introduced at least one fully electric kitchen.



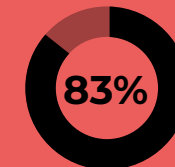
SCOPES 1 & 2 ACTION



of members have completed a behaviour change programme.



SCOPES 1 & 2 ACTION



of members source renewables.

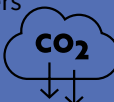


SCOPE 3 (SUPPLY CHAIN) EMISSIONS

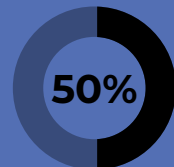
**2%** ▼  
**225,000 TCO<sub>2</sub>e**

Achieved through:

- Supplier actions defined
- Adoption by suppliers at early stages.



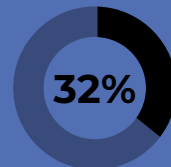
SCOPE 3 ACTION



of members are putting a supplier engagement plan in place this year.



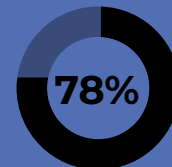
SCOPE 3 ACTION



of members source regenerative produce.



SCOPE 3 ACTION



of members measure and report food waste.



ALL FORUM MEMBERS HAVE A

**CLIMATE ACTION PLAN**

which informs operators of what actions to take, in what order and to what effect.



# CONTENTS

## 01

### INTRODUCTION

- WHY NET ZERO STILL MATTERS
- BUSINESS BENEFITS OF TAKING ACTION
- OUR FOCUS FOR ACTION

## 02

### 2030 TARGET - **ENERGY**

#### SCOPES 1 & 2 - OUR DIRECT EMISSIONS

- PROGRESS TO DATE
- ACHIEVEMENTS
- CASE STUDIES
- HOW THE FORUM SUPPORTS
- WHAT THE SECTOR NEEDS FROM GOVERNMENT

## 03

### 2040 TARGET – **SUPPLY CHAIN** SCOPE 3 – PURCHASED GOODS AND SERVICES

- PROGRESS TO DATE
- ACHIEVEMENTS
- CASE STUDIES
- HOW THE FORUM SUPPORTS
- WHAT THE SECTOR NEEDS FROM GOVERNMENT

## 04

### LOOKING FORWARD

- STRATEGIC PRIORITIES
- HOW THE FORUM WILL SUPPORT YOU
- WHAT WE NEED FROM YOU

01

# INTRODUCTION



# INTRODUCTION

**The Zero Carbon Forum is a collaboration of UK hospitality and brewing's leading operators, working together to tackle the challenges and impact of climate change.**

In 2020, we identified the key emissions areas and actions that needed to be taken to reduce the sector's carbon footprint. This became "Net Zero: The Guide for the Brewing and Hospitality Sector" - our roadmap.

Over the past 5 years, the Forum has grown from 22 founding members to 70 hospitality and brewing businesses. It is backed by UK Hospitality, the British Beer & Pubs Association (BBPA) and the British Institute of Inn keeping (BII).

This document sets out our progress to date, our biggest challenges and the bold steps that need to be taken if we are to reach our targets and build resilient, efficient businesses capable of thriving in a decarbonised economy.



# WHY NET ZERO STILL MATTERS



## CLIMATE ACTION GENERATES VALUE WHEN INTEGRATED INTO CORE STRATEGY

It's no longer solely about doing the right thing.

It's about building stronger businesses and being ready to weather the storm.

The benefits are clear: it increases efficiency, builds resilience, engages customers and employees, and unlocks access to investment.

## EXTREME WEATHER IS ON THE RISE



Since 2020, global temperatures have continued to rise along with the number of extreme weather events. The UK has experienced extremes from its wettest 18 months on record to its hottest summer ever in 2025, with temperatures crossing 40 degrees for the first time in 2022.

## AND IT ISN'T GOOD FOR HOSPITALITY



**25% ▼ SALES**  
IN STORMS



**8% ▼ SALES**  
DUE TO EXTREME HEAT

**It's bad for sales.** Some warmer weather can be good for pubs but not so much for restaurants. It's increasingly important to think about weather effects in both sales forecasts and reporting climate risks. Property teams should be considering physical risks in new site selection and design.

**It's bad for price, quality and availability.** Extreme weather is affecting both the availability and cost of core commodities that hospitality menus and brewers rely on such as tomatoes, potatoes, barley and olive oil. Pizza operators have taken to stockpiling tomato puree due to failing tomato crops in Spain from the extreme heat.



## INTRODUCTION

# CLIMATE ACTION DELIVERS POSITIVE BUSINESS OUTCOMES

Whilst the landscape has changed over the past five years, the opportunities and positive business outcomes of being a net zero, sustainable business haven't. Credible climate action delivers improved efficiency and cost savings, resilience to the impact of climate change, and improved brand value.

## EFFICIENCY

Since we launched, we have recovered...



**£5.2m** OF LOST PROFITS  
IN ENERGY WASTE



AVERAGING **£2.5K** PER SITE

If everyone in the sector did this we could recover



**£84m** IN LOST PROFITS  
AND 70,000 TCO<sub>2</sub>e

## RESILIENCE

If all our members chose regenerative flour, we'd...



SAVE **3m TCO<sub>2</sub>e** BY  
2030



IMPROVE RESILIENCE IN OUR  
SUPPLY CHAINS



ADDRESS BIODIVERSITY LOSS

## BRAND

Committing to the Roadmap targets was only the beginning.



REAL BRAND VALUE IS BEING BUILT  
THROUGH CREDIBLE CLIMATE ACTION

that fosters trust. Engaging storytelling and communications is helping members strengthen brand loyalty and interest.



**ZERO  
CARBON  
FORUM**

Using the Forum's logo in your communications underscores your credibility.

# THE OPERATING CONTEXT HAS CHANGED



## ECONOMIC

The sector roadmap launched during COVID. Since then, there has been an energy crisis, cost of living crisis, food price inflation of nearly 20%, decreases in business rate relief, increases to National Living Wage, and increases in National Insurance Contributions - expected to cost the sector **£3.4 billion** in 2025 (UKH). Coming to the end of 2025, trading conditions continue to present significant challenges for the sector, increasing the importance of recovering lost profits from waste wherever possible.



## POLITICAL

The politics of net zero have changed significantly in the US from Joe Biden's Inflation Reduction Act of 2022 (the single largest investment ever in climate and energy), to the new approach adopted by the Trump administration. The UK Government remains committed to net zero: in 2025 the Prime Minister committed to an **81%** emissions cut by 2035, despite challenges from opposition parties. Upcoming legislation through the UK Sustainability Reporting Standards (UK SRS), will increase requirements to measure and report emissions and climate impacts for businesses.



## BUSINESS COMMITMENTS

Despite some headlines about business climate targets, a recent review of 75 global companies showed only **13%** had reduced their sustainability ambitions, while **32%** expanded them. Meanwhile, the Science Based Target initiative has grown from 1,000 signatories in 2020 to 11,000 in 2025. And in the UK Brewing and Hospitality sector, the Forum has grown from 22 founding members to over 70 including major operators.

# STAKEHOLDERS REMAIN COMMITTED



## INVESTORS

For some investors, priorities have been influenced by the changing political ambition on net zero, although much of this is a US narrative. In the UK, brewing and hospitality investors are increasingly evaluating ESG credentials and seeking to understand potential impacts on valuations\*.

---

\*Energy and Environment Alliance (2025):

**How Important is ESG in Hospitality Investment Decisions? >**



## CUSTOMERS

There are significant brand risks with over a third of customers not choosing to buy from brands they think are unsustainable or greenwashing\*\*. Customer demand for lower carbon products has met the reality of the cost-of-living crisis. Despite this, some Forum operators have enhanced their offering and increased sales by providing regeneratively produced products that improve taste and provenance.

---

\*\*CGA by NIQ (2024) Winning the loyalty of sustainability spenders:

**Winning the loyalty of sustainability spenders >**



## EMPLOYEES

Attracting and retaining talent is crucial in hospitality. And talent loves sustainability. **94% of hospitality staff** consider a company's social and environmental responsibility when choosing a place to work. And **19% of employees** have left their employers because of a perceived lack of commitment to sustainability\*\*\*.

---

\*\*\*Nutritics and CGA by NIQ. (2024) Sustainability Matters:

**What your teams want and how brands can win >**

INTRODUCTION

# MORE BUSINESSES ARE COMMITTED

THE FORUM IS NOW

# 70

## MEMBERS STRONG



REPRESENTING ALL AREAS OF THE  
HOSPITALITY SECTOR...

RESTAURANTS | PUBS | HOTELS  
CONTRACT CATERING | BREWERIES  
BARS | EXPERIENTIAL LEISURE



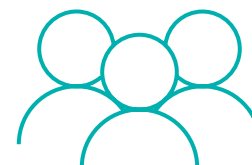
# 35,000

VENUES



# £15 billion

REVENUE

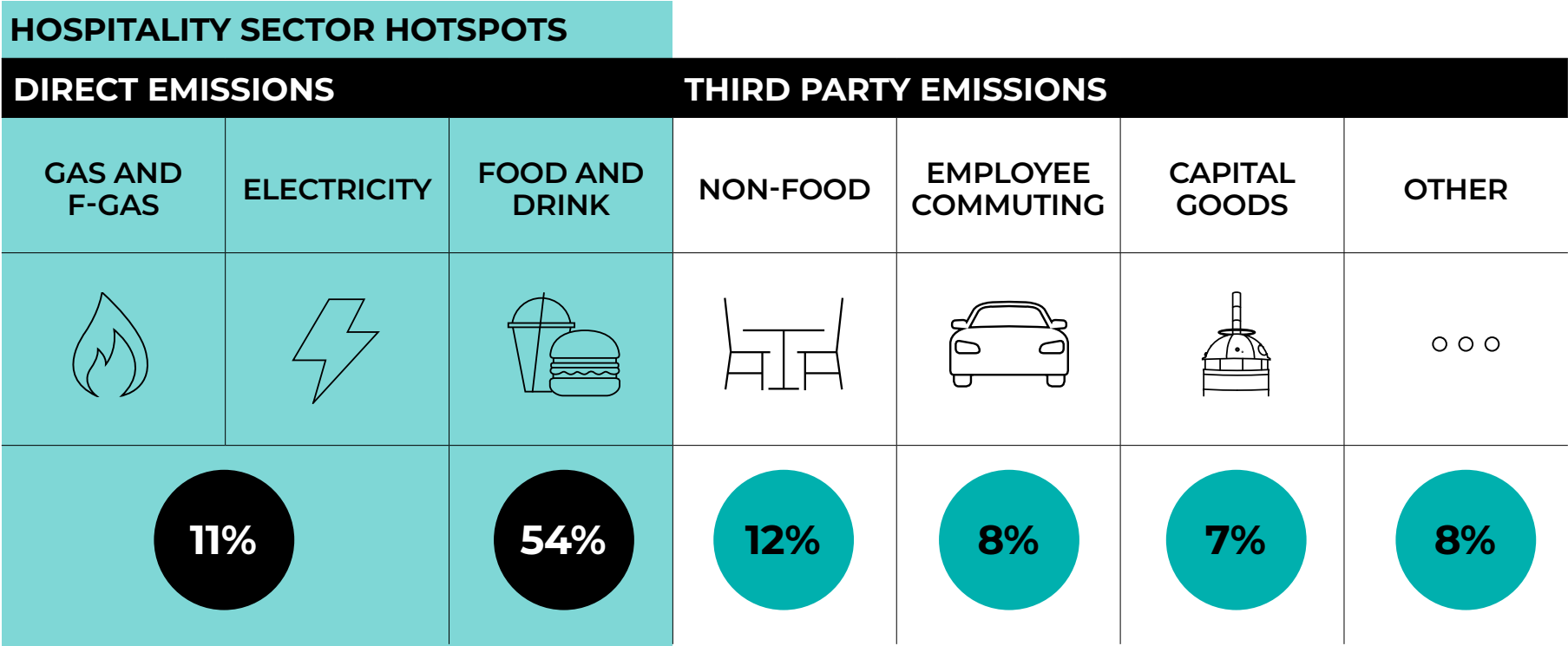


# 1 million

EMPLOYEES

# OUR FOCUS FOR ACTION

Our focus is on hotspots where the sector is most exposed to risk, emissions are most impactful, and we have the greatest opportunity to influence.



## DIRECT EMISSIONS (ELECTRICITY AND GAS)

Clear reductions have been achieved since 2020. But there’s further to go. At over 10% of our impact, within our direct control and a target of net zero by 2030, this remains an important area of focus.

## FOOD AND DRINK

The production of food and drink contributes to around a third of global greenhouse gas emissions, and it’s over 50% of the sector’s footprint. Not only that, it’s where we are most exposed to risk. The food sector is uniquely placed to reduce emissions and build resilience in production.



## INTRODUCTION

# NET ZERO IN HOSPITALITY AND BREWING

**Operators are improving their businesses through greater efficiency and cost saving, resilience against climate impacts, and improved brand reputation with stakeholders. This is how they'll get to net zero.**

## PROPERTY AND ENERGY

### **CARBON NEGATIVE BUILDINGS**

Built with carbon-negative materials and living walls, inside and out.

### **ENERGY AUTONOMY**

Very efficient and generated onsite. No gas, no energy bills, no grid reliance.

---

## PURCHASED GOODS AND SERVICES (FOOD AND DRINK)

### **CULTURED PROTEINS AND PRECISION FERMENTATION**

The flavours of the world, reinvented with microscopic precision. Steaks grown in bioreactors. Cheese without cows. Tuna sashimi made from algae and mycoprotein.

### **LOCALISED, CIRCULAR BREWING**

Craft beer and botanical spirits brewed onsite or delivered via reusable keg systems from carbon-negative microbreweries.

### **ZERO CARBON FRUIT AND VEG**

Grown locally in vertical farms using sustainable inputs and delivered in autonomous electric vehicles, delivering highly nutritious, fresh ingredients and minimal inventory waste.

## OPERATIONS

### **NO INVENTORY WASTE**

AI-enabled demand forecasting - what gets made gets eaten. No fridge full of lost profits.

### **NO OPERATIONAL WASTE**

Fully reusable packaging and closed loop delivery systems.

### **ROBOTIC AND DRONE DELIVERY**

Autonomous, silent drones all powered by zero-emission electricity.

---

## GOVERNANCE

### **ACCOUNTABILITY AT A SENIOR LEVEL**

Supported by ambitious KPIs, Exec incentives and delivery through functional teams.

### **CARBON EMBEDDED INTO FINANCIAL DECISION-MAKING**

Emissions are treated as liabilities. Capital allocation, risk management and performance metrics are aligned with a net-zero trajectory.

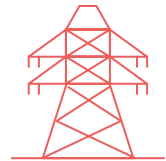
### **THE BRAND IS TRUSTED**

Sustainability and progress is communicated transparently, credibly and frequently.

# 02

## 2030 TARGET - ENERGY

### SCOPES 1 & 2 – OUR DIRECT EMISSIONS



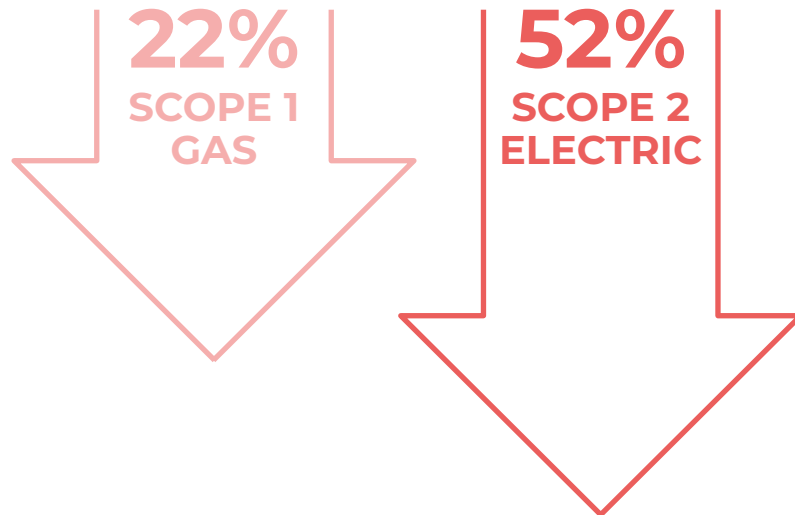
**2030**

Abating all avoidable emissions  
from our direct operations  
(Scopes 1 & 2)

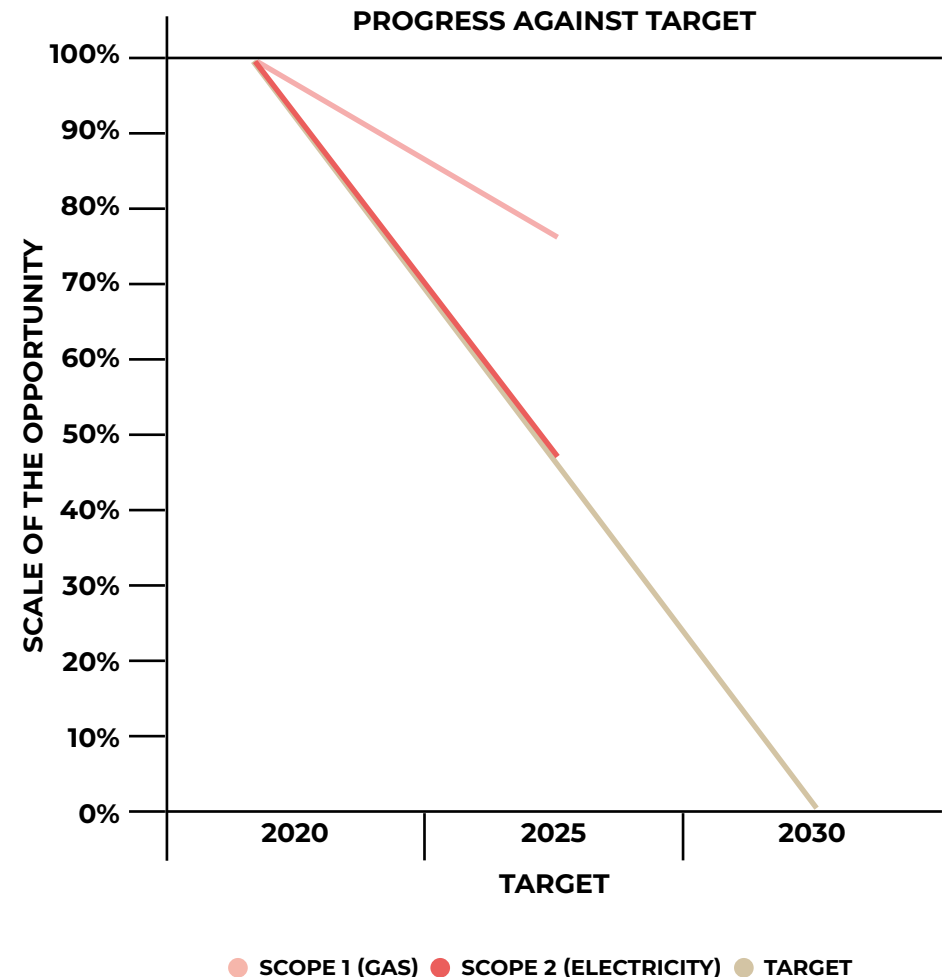
# SCOPES 1 & 2 – STRONG PROGRESS MADE

Significant reductions in energy emissions have been achieved through 3 key actions;

1. Behaviour change initiatives to reduce energy waste from operations.
2. Introducing energy-efficient equipment including electric kitchens.
3. Buying renewable energy.

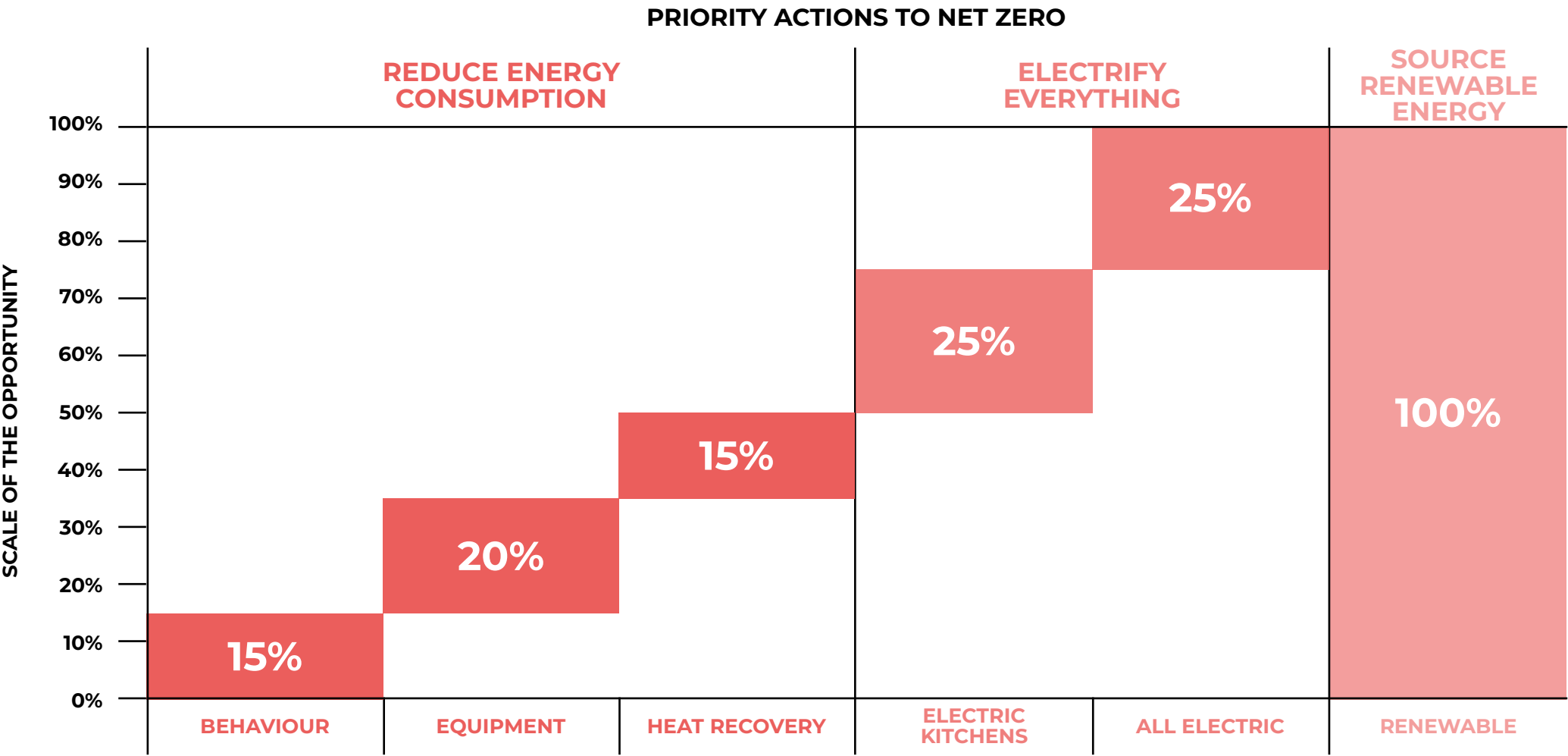


600,000 TCO<sub>2</sub>e ABATED ANNUALLY



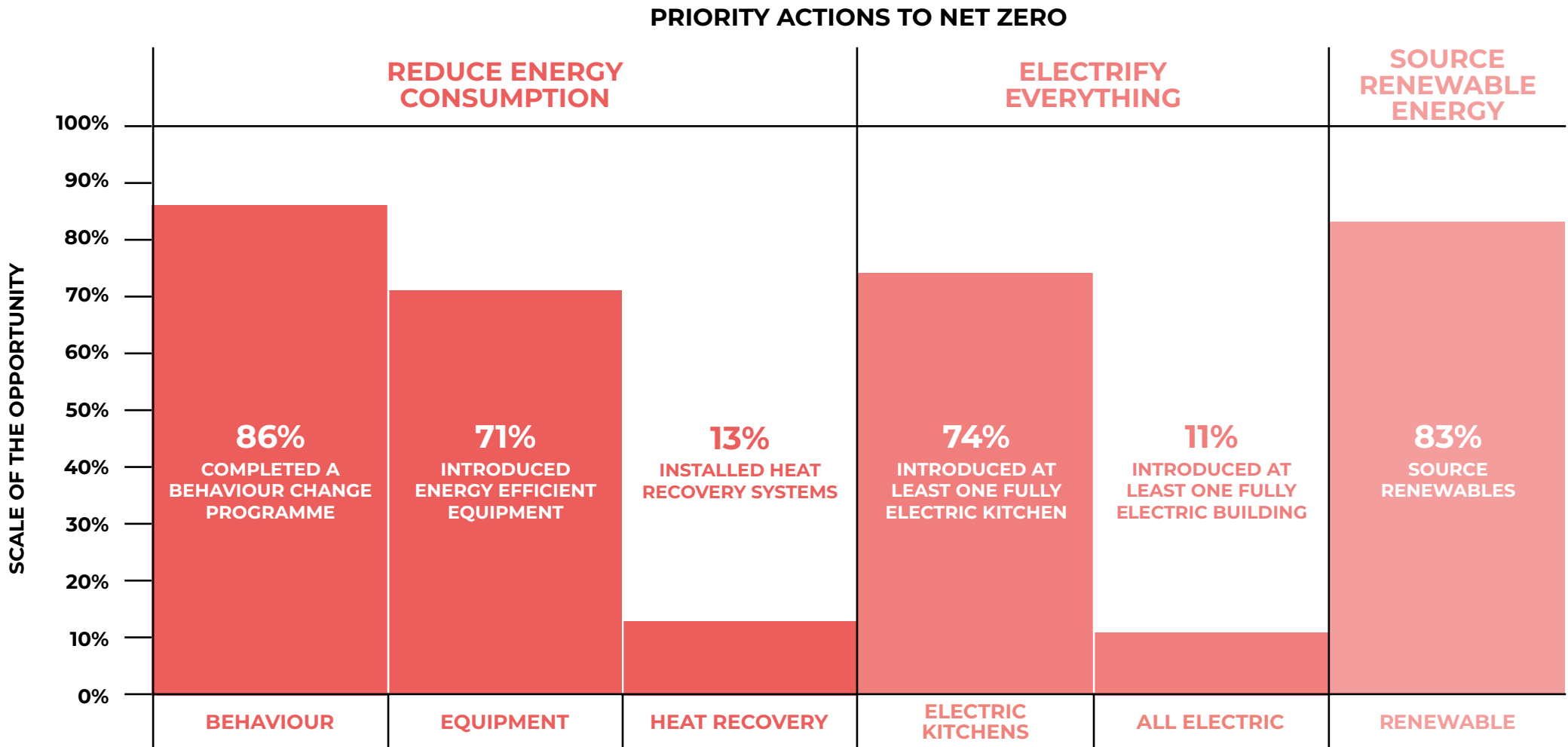
# PATHWAY TO ZERO

The pathway to zero on Scopes 1 & 2 comprises three major steps: reducing energy use fully electrifying operations and being underpinned by 100% renewable energy. We’ve modelled the potential contribution of each of the levers to contribute to operators’ decarbonisation efforts, based on member data and our research.



# MEMBERSHIP ACHIEVEMENTS

These figures demonstrate the progress the sector has made to reduce emissions from Scopes 1 & 2. It comes as a result of collaboration through the Forum to share best practice and guidance on execution and implementation.

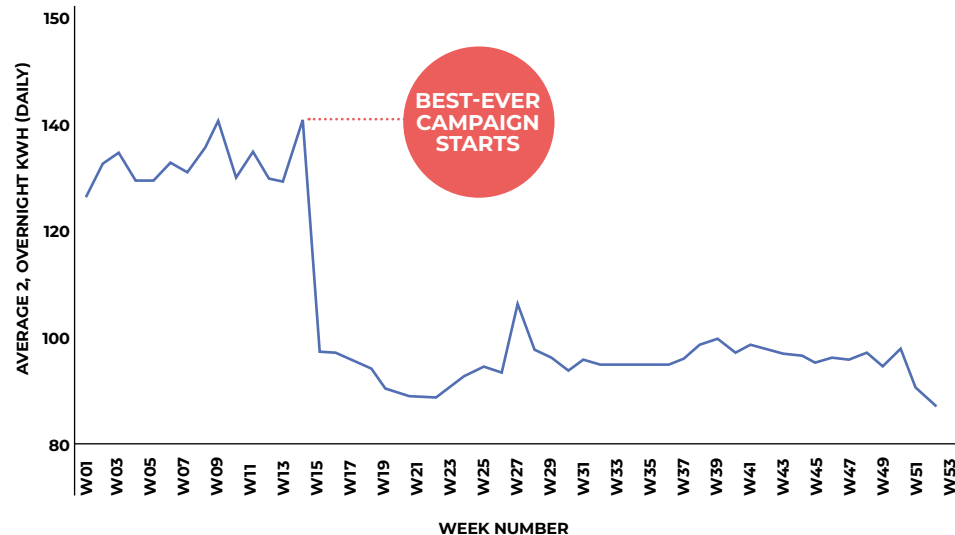




# ENERGY REDUCTION

## SHEPHERD NEAME AND ZERO CARBON SERVICES

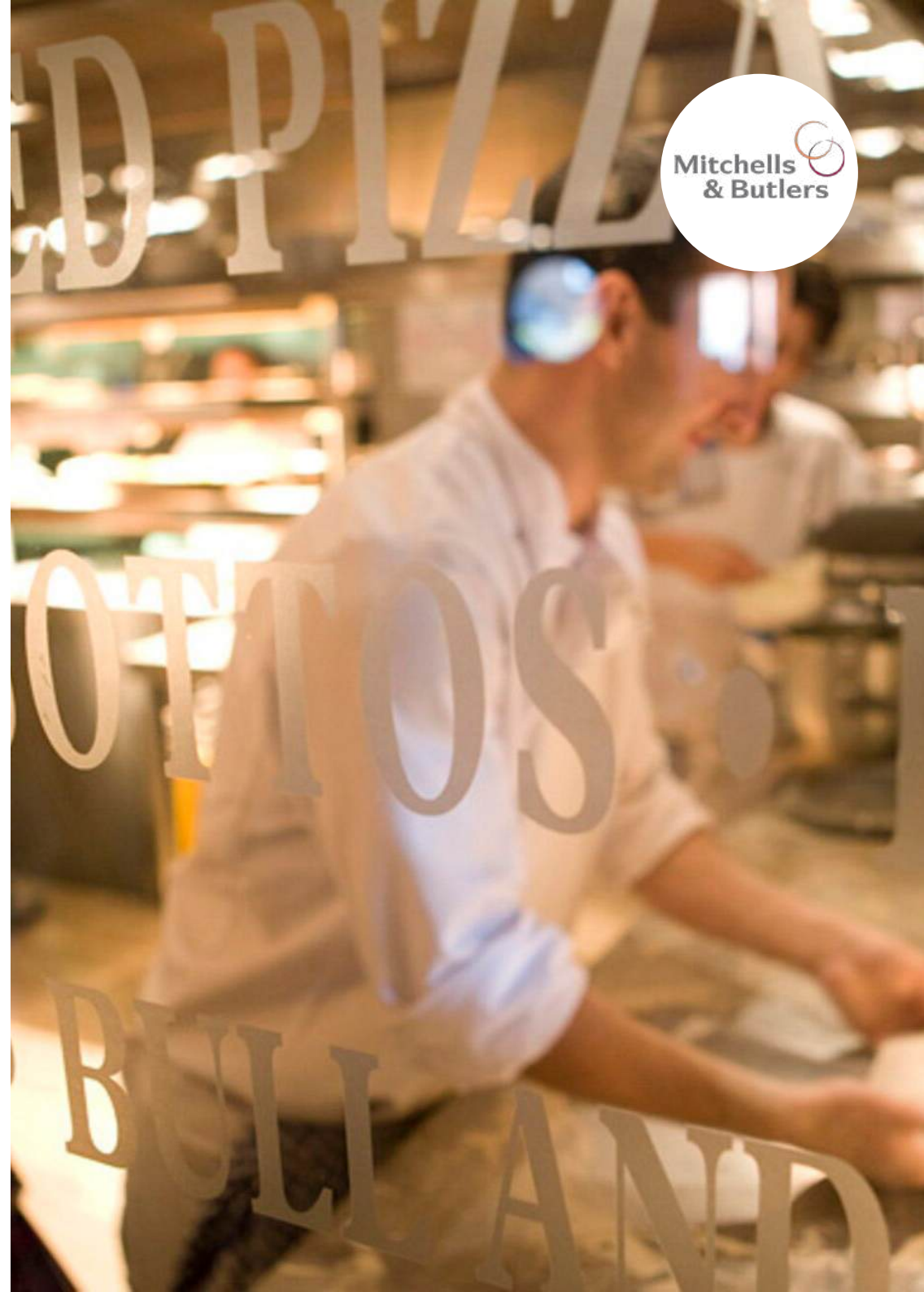
The 'Best-Ever Campaign' focused on resetting behaviours after the summer and completing the best close downs ever, resulting in a **28% reduction** in overnight use. This behaviour has become a habit. The campaign was brilliantly led from the top, holding all levels of the business accountable.



# KITCHEN ELECTRIFICATION

## MITCHELLS & BUTLERS

Mitchells & Butlers is switching out gas kitchens for electric alternatives across its estate - 100 venues and counting. By electrifying kitchens, investing in chef training, and rolling out energy-saving tech, M&B is cutting carbon, reducing reliance on fossil fuels, and future-proofing its operations.





2030 NET ZERO TARGET – ENERGY

# LOW CARBON FIT OUTS

## WAGAMAMA

The Restaurant Group's sustainable refit of wagamama at Clarks Village proves that smart design pays off. Lower energy bills, responsibly sourced materials, and a dining space that reflects the values of today's climate-conscious customer.

The restaurant proudly achieved a Gold SKA rating, highlighting its commitment to sustainable design and operations.



wagamama

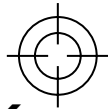
**FURNITURE  
MADE FROM  
AT LEAST 80%  
RECYCLED  
OR REUSED  
MATERIALS**

**TABLES MADE FROM  
83,000  
RECYCLED  
CHOPSTICKS**

# HOW THE FORUM SUPPORTS

The Forum has developed a comprehensive suite of tools, guidance and insight to enable members to achieve net zero on Scopes 1 & 2.

## ENERGY HEALTH CHECK



A diagnostic review highlighting wasted energy and behavioural opportunities. Identifies and unlocks quick wins to cut carbon and cost.

## SAVE WHILE YOU SLEEP<sup>zzz</sup>



Operators are recovering up to **£3.5k per site** through energy-saving coaching from Zero Carbon Services.

## LOW CARBON FIT-OUT GUIDE



Designing for long-term savings and sustainability. Features checklists, case studies, and practical advice for low-cost, low-carbon venue design.

## PROPERTY ACTION GROUP



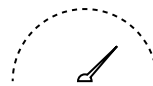
Access expert guidance and peer collaboration, sharing best practice on decarbonising venues.

## CLIMATE ACTION PLAN



The definitive set of actions to reduce emissions across all Scopes. Enables planning with confidence based on business priorities.

## DEFINITIVE GUIDE TO SCOPES 1 & 2



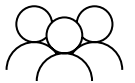
Comprehensive step-by-step instructions for every element of your roadmap.

## GRID CAPACITY CAMPAIGN



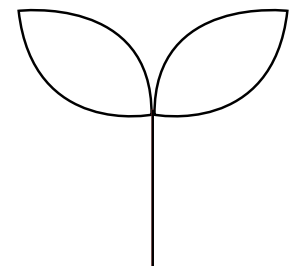
Combining the collective scale of members to influence policy and remove barriers to electrification.

## ZERO CARBON MARKETPLACE



Connecting members directly to trusted low-carbon suppliers and solutions to accelerate emissions reductions.

Our best-in-class sector collaboration is enabling the sector to meet its net zero ambitions more efficiently and cost effectively. **To net zero, together at pace.**



# WHAT THE SECTOR NEEDS FROM GOVERNMENT

The sector needs further support to continue to decarbonise at pace.

Operators could reduce emissions and energy use quicker with the removal of some key barriers to efficiency actions.

1. **Grid capacity** – reducing the cost to hospitality of upgrading grid capacity, and relief from additional non-commodity pricing
2. **Incentives** for low carbon behaviour – including
  - a. Support for capital investments to introduce low carbon alternatives and energy efficiency measures such as all electric kitchens
  - b. Addressing the cost discrepancy between gas and electricity, to enhance the business case for moving to all electric
3. **Reduced regulatory burden** – such as ESOS.



TO REACH  
**NET ZERO  
BY 2030**

GRID CAPACITY, ENERGY COSTS AND  
REGULATION MUST KEEP PACE WITH  
THE SECTOR'S AMBITION



**ZERO CARBON SERVICES HAS DIRECT  
GOVERNMENT SUPPORT FROM THE  
DEPARTMENT OF ENERGY SECURITY  
AND NET ZERO (DESNZ)**



**PROVIDING  
FUNDING FOR OVER  
600 SMES**

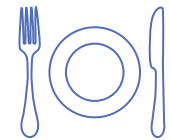
**TO HELP THEM CUT ELECTRICITY AND  
FOOD WASTE, AND SAVE MONEY**



# 03

## 2040 TARGET – SUPPLY CHAIN

SCOPE 3  
PURCHASED GOODS AND SERVICES



**2040**

Abating all avoidable emissions  
across our supply chains (Scope  
3) and credibly offsetting  
residuals to achieve  
net zero

# SCOPE 3 – REDUCTIONS SLOWER

Early stages of action on Supply Chain emissions. Our work has identified substantial emissions reductions opportunities, particularly in food and drink – and our collaborative action will have a big effect.

While overall progress has not yet reached the pace or scale required, there are clear signs of action and significant opportunities to accelerate.

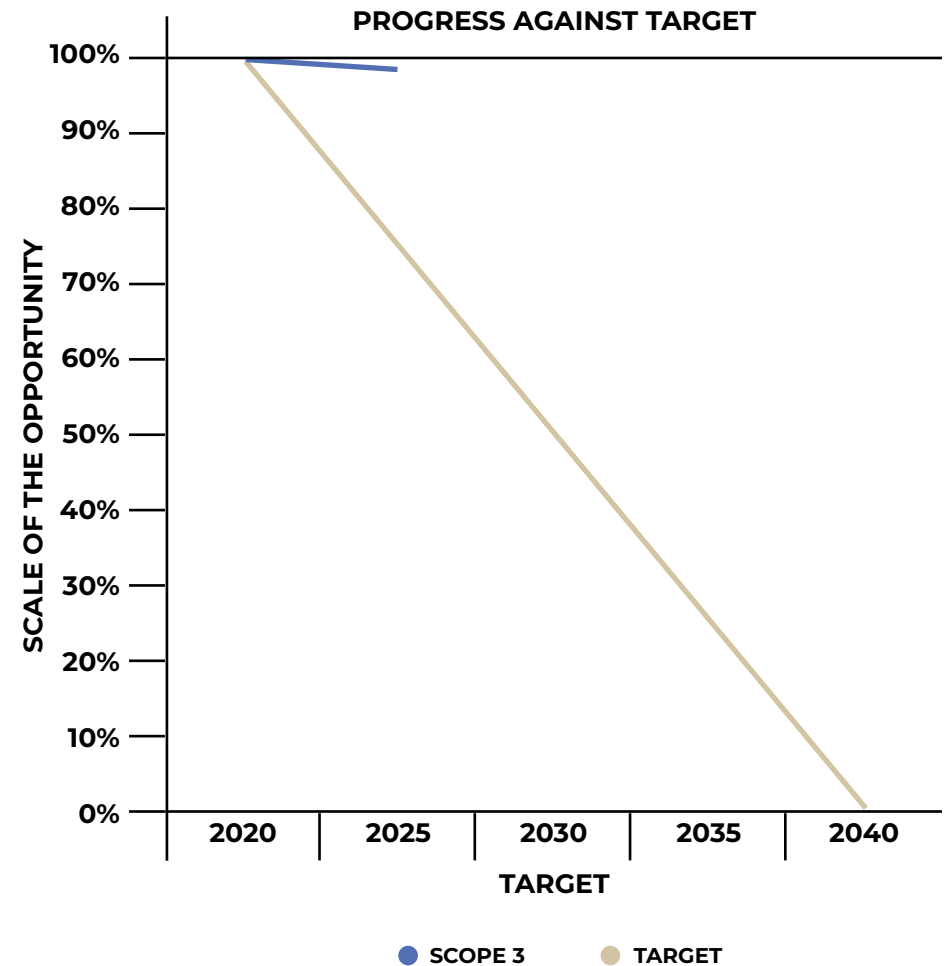
Pockets of action to date. We've built systems to achieve systemic sectoral change.

Decarbonising entire sectors is complicated and takes time. We've defined the actions our suppliers need to take.

Progress is harder to prove. Achievements are increasingly factored into calculations.

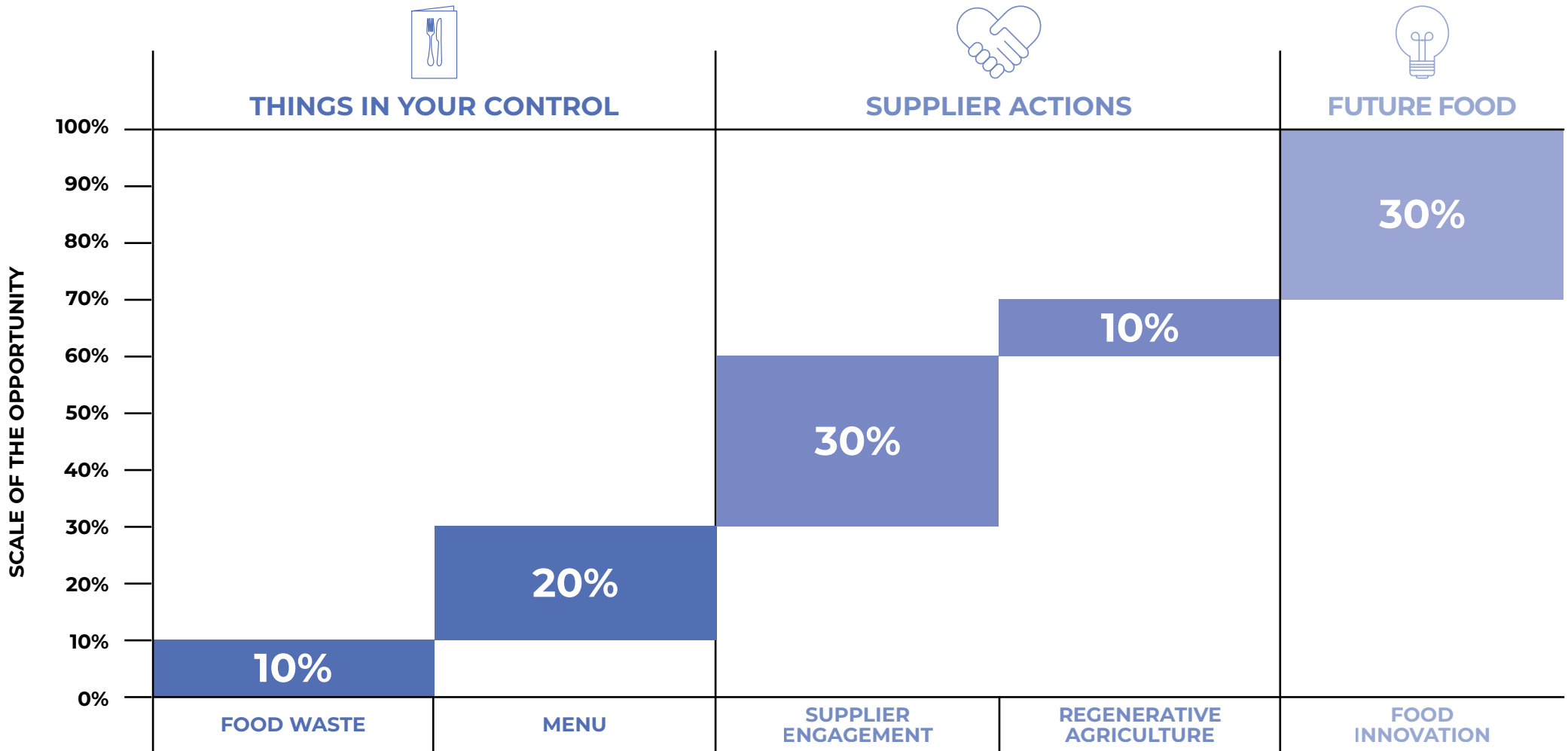


225,000 TCO<sub>2</sub>e ABATED ANNUALLY



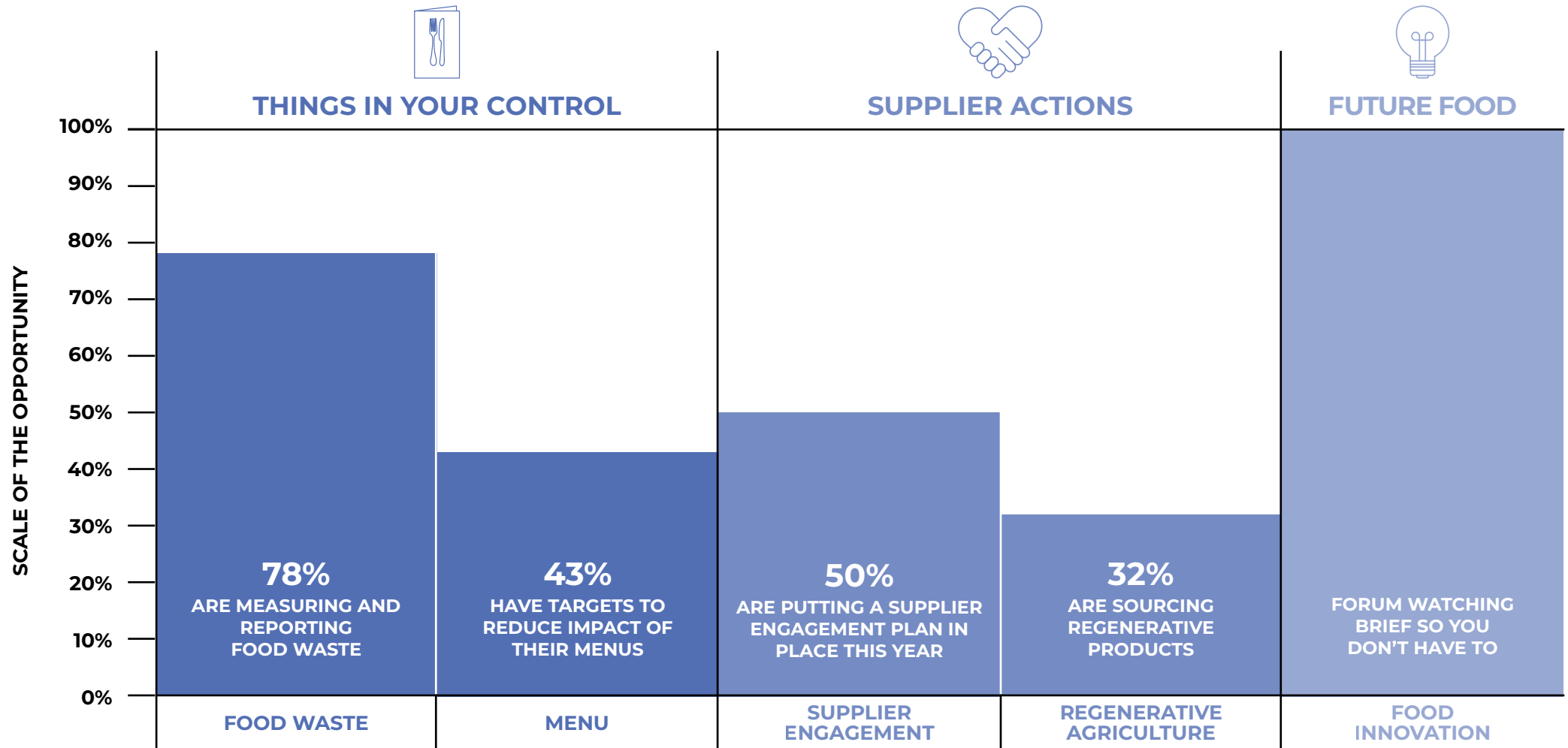
# PATHWAY TO ZERO: FOOD AND DRINK

The pathway to zero on food and drink comprises three major steps: changes within operators' control; supplier action; and future innovation. From our research and member data analysis we've modelled the potential contribution of each of the reduction actions to have clear path to net zero.



# MEMBERSHIP ACHIEVEMENTS

These figures demonstrate the progress of the sector to reduce emissions from food and drink. The Forum's support, including sharing insight and best practice on how to have a meaningful impact on Scope 3 emissions, is driving rapid change through the sector.



# SUSTAINABLE MENUS

With the help of Nutritics, we demonstrated that product reformulation can reduce cost, calories and carbon.



LOWER COSTS

**22% ▼**



LOWER EMISSIONS

**47% ▼**



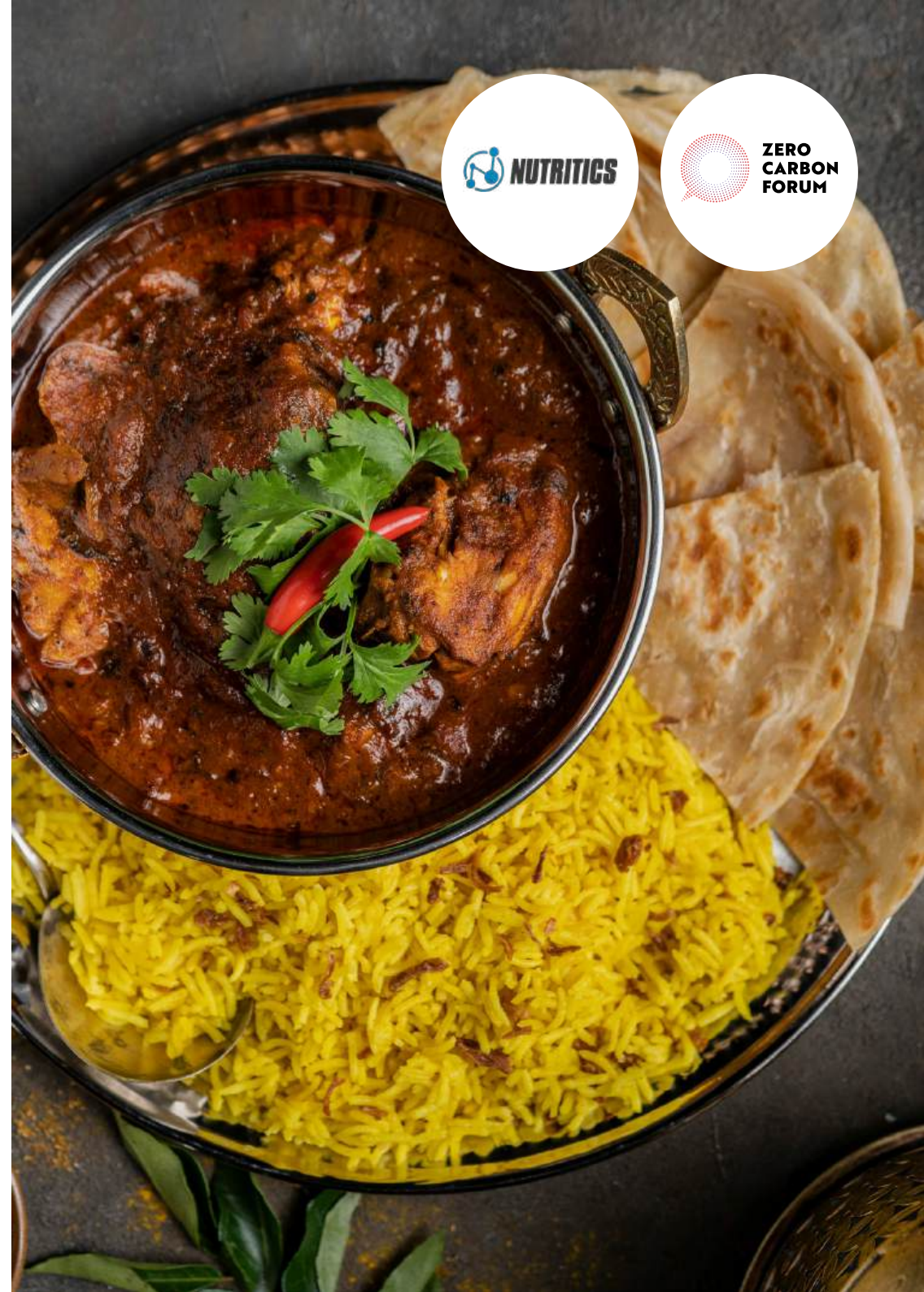
LOWER CALORIES

**10% ▼**



UNANIMOUSLY VOTED

**BETTER  
ON TASTE**





# SUSTAINABLE SOURCING

**Working in partnership with Grassroots Farming and the Zero Carbon Forum, Fuller's are sourcing UK beef produced using regenerative farming practices.**

A flexible menu to address the carcass balance problem

Shorter supply chain to cut emissions and build transparency

Collaboration for impact, involving farmers, butchers, chefs and suppliers



# RESILIENT SUPPLY CHAIN

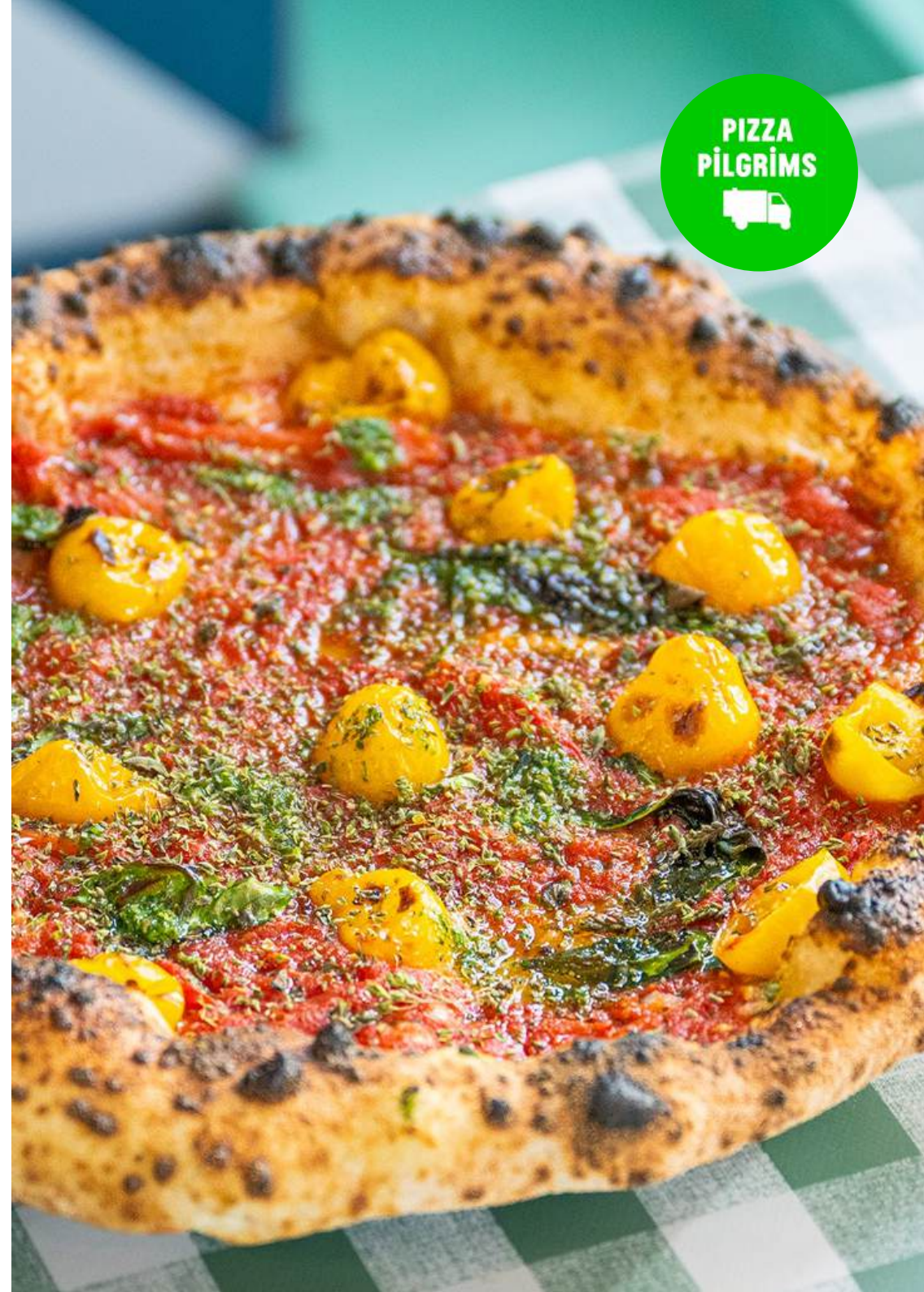
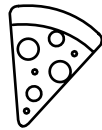
**Local, hydroponically grown basil from Harvest London is being sourced by Pizza Pilgrims, to address supply chain challenges driven by climate change.**

Shorter deliveries (e-bike not air freight) reduces transport emissions.

Delivers fresher product improving quality.

Longer shelf life means lower waste.

Reduced waste and rising costs of imported alternatives have made this the most cost effective approach.





# MAKING BEEF SUPPLY CHAINS FIT FOR THE FUTURE

## Beef Action Group

Working with suppliers to serve quality meat  
and lower emissions.



Partnered with beef producers to develop a set of supplier actions to help members select and engage with suppliers.

### This approach:

Ensures **buyers** ask the right questions, using consistent language, so suppliers are clear on what actions they need to take.

Focuses on the actions **farmers** can take – farms produce the highest beef emissions and face the highest climate risks.

Creates **industry alignment** for more efficient, effective engagement.

These actions are helping to deliver efficient, resilient supply chains, ensuring **continuity of supply** against the impacts of increasingly common extreme weather events.

Decarbonising UK hospitality  
beef supply chains  
will remove

**4 million tCO<sub>2</sub>e**

an **11% reduction**  
in the sector's emissions.



# HOW THE FORUM SUPPORTS

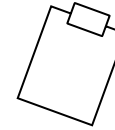
Members are improving margins, reducing emissions, and accelerating progress to net zero through collaborative action and practical tools.

## CLIMATE ACTION PLAN



The definitive set of actions to reduce emissions across all Scopes. Enables planning with confidence based on business priorities.

## SUSTAINABLE MENU DAYS



Boosting margins and delighting customers. Our Sustainable Menu Days demonstrate how low-carbon menu design can improve profit and flavour while reducing emissions.

## SUPPLIER ENGAGEMENT TOOLS



Making sustainability part of everyday procurement. Including roadmap and flowcharts to help teams embed environmental impact into purchasing decisions.

## INDUSTRY STANDARD INTERVENTIONS



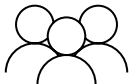
Industry frameworks for key emissions areas such as beef, dairy, and waste. Aligns sector engagement for greater efficiency, focus and impact.

## ACTION GROUPS



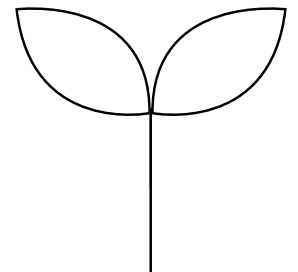
Tackling tough emissions challenges together by uniting members to share data, test solutions, and drive change on complex issues.

## ZERO CARBON MARKETPLACE



Connecting members directly to trusted low-carbon suppliers and solutions to accelerate emissions reductions.

Our best-in-class sector collaboration is enabling the sector to meet its net zero ambitions more efficiently and cost effectively. **To net zero, together at pace.**



# WHAT THE SECTOR NEEDS FROM GOVERNMENT

**We have developed tools and systems that have improved both supplier engagement and impact measurement. However, there is further to go, and operating conditions continue to put pressure on the sector.**

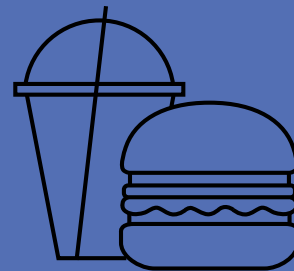
Rising input costs and supply chain uncertainty prevent suppliers from adapting at the pace necessary to align with national climate goals.

Government support must address barriers to adopting lower-carbon value chains, including -



**The provision of** financial and structural support to incentivise low carbon alternatives and climate-resilient agriculture.

**Support** for greater consistency in the measurement and reporting of the UK food sector emissions.

**Investment** in education and training to upskill the food sector to adopt regenerative, resource-efficient, and low-carbon practices at scale.



THE PRODUCTION OF FOOD AND DRINK REPRESENTS OVER

**50%**  **OF THE SECTOR'S FOOTPRINT** 

AND IS WHERE THE SECTOR IS MOST EXPOSED TO RISK



**REGULATION WILL PLAY A CRUCIAL ROLE IN ACCELERATING PROGRESS.**

**FOR EXAMPLE, DEFORESTATION REGULATION IS ALREADY PROMPTING SIGNIFICANT UPTAKE OF CERTIFIED DEFORESTATION-FREE SOY**



04

**LOOKING  
FORWARD**



# THE CHANGING CLIMATE: WHAT WE CAN EXPECT



## **MORE SUPPLY CHAIN VOLATILITY**

increasing risks of  
sourcing raw ingredients  
across global markets.

## **MORE PRICE VOLATILITY**

increasing pressure on  
financial planning and  
cash flow.

## **INCREASED OPERATIONAL COSTS**

due to food inflation  
and carbon emissions  
taxes.

## **BRAND REPUTATION**

increasing consumer  
and employee  
awareness and  
expectation.

## **GDP DECLINING**

with costs of  
adaptation exceeding  
mitigation.



“Survival is not  
the fastest or  
the strongest.  
It’s those most  
able to adapt.”



LOOKING FORWARD

# OUR FOCUS: SCALE

**The Forum was established to simplify, systemise and scale credible climate action in support of a thriving sector.**

To help our members meet their commitments more quickly and easily, we are focused on:

## **AI-ENABLED TOOLS**

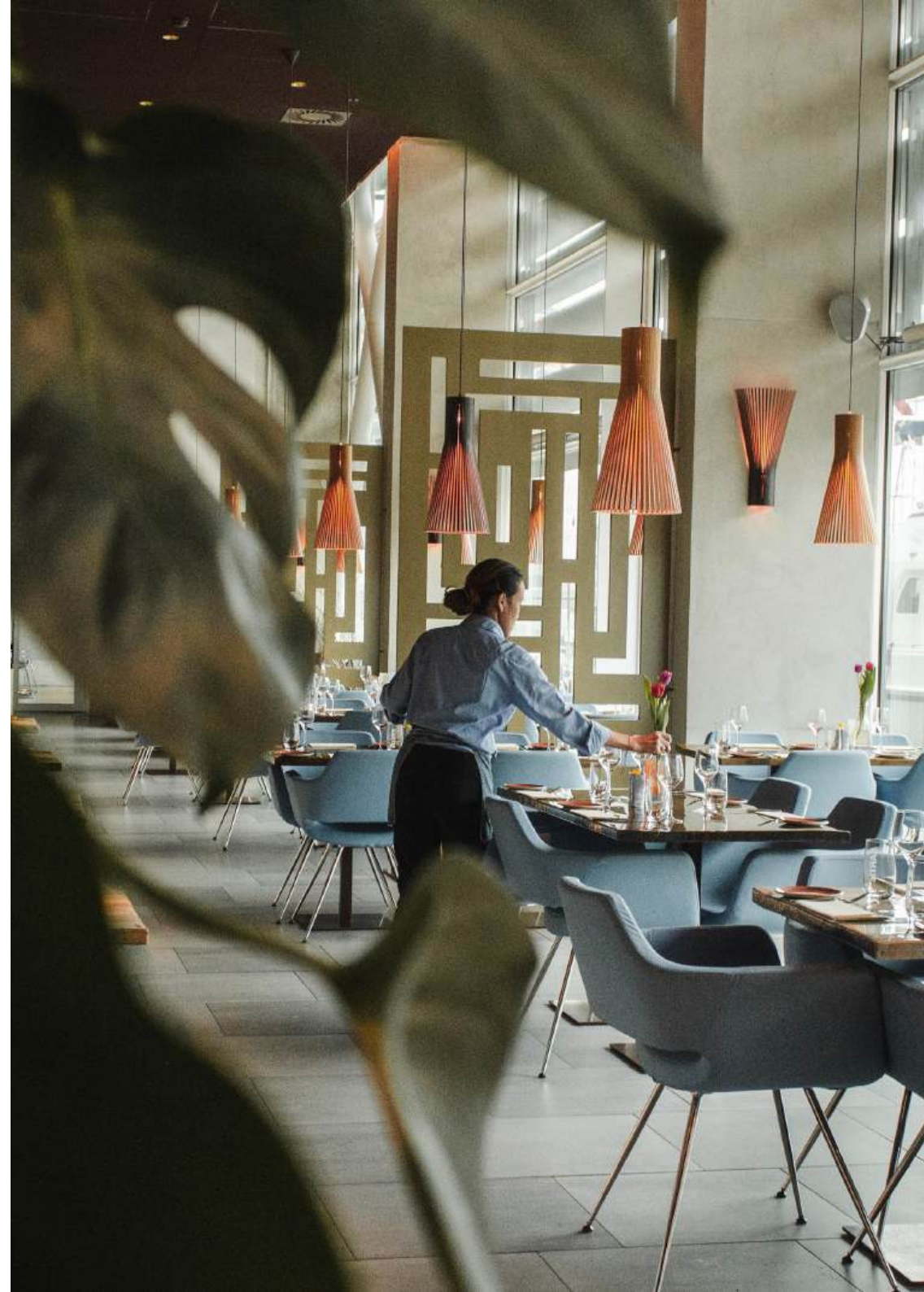
Integrating AI into our database for quick, accurate and tailored transition plans and data.

## **COLLABORATION FOR SYSTEMS CHANGE**

Strengthening supplier engagement, sharing insights and scaling impact.

## **GOVERNMENT ENGAGEMENT**

Expanding funding and reducing barriers to help operators go faster.



# OUR APPROACH: PRIORITISE BUSINESS OUTCOMES AND SUPPORT YOUR TEAMS TO DELIVER

We will deepen our engagement with your functional teams to help deliver credible climate action that builds efficient, resilient brands that people love to support.

## PROPERTY BUILD THE MOST EFFICIENT AND RESILIENT VENUES

Cut costs with:

- High-ROI fit-outs
- Equipment upgrades
- Operational practices

Future-proof estates against extreme weather and energy costs.

Strengthen credibility with investors and landlords.

## PROCUREMENT BUILD A RESILIENT SUPPLY CHAIN

Cut costs and save time with:

- Defined supplier actions to reduce emissions
- Consistent supplier-engagement tools
- Collaborative sourcing

Build resilience across the food system.



## FOOD TEAMS DESIGN LOWER IMPACT, HIGHER MARGIN MENUS

Enabling chefs to:

- Design delicious, lower carbon, lower cost menu design
- Identify supply and cost risks of key ingredients.

## MARKETING BUILD BRAND LOYALTY

Supporting marketers to:

- Make credible green claims
- Deliver efficient and effective messaging
- Use evidence-based customer insights to avoid brand risk.

## FINANCE ASSESS CLIMATE RISKS AND OPPORTUNITIES

Prepare for rising regulatory and financial risks

- Carbon accounting
- Clear regulatory guidance

Strengthen investor confidence with accurate reporting.

LOOKING FORWARD

# NET ZERO, TOGETHER AT PACE

TOGETHER, WE'RE PROVING  
THAT CREDIBLE CLIMATE  
ACTION DELIVERS REAL  
BUSINESS BENEFITS

EFFICIENCY

RESILIENCE

BRAND

Now we are scaling what works, deepening  
collaboration, and unlocking even greater impact.

Thank you to every member, partner, and supporter helping us  
accelerate the hospitality industry's transition to net zero.

If you're not yet a member and would like to learn more about  
how we support businesses to reduce their carbon emissions  
and build their resilience and brand, get in touch.

[info@zerocarboncompany.org](mailto:info@zerocarboncompany.org) | 020 7692 4244





