UK PET FOOD



Sustainability Ambition 2030

From commitment to progress

MEMBER PROGRESS 2026

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The baseline assessment was conducted by independent sustainability experts Canopy: Sustainability Consulting www.canopyconsulting.co

FOREWORD

"UK Pet Food's Sustainability Ambition 2030 sets a clear direction for our sector."

This first baseline marks the move from commitment to measurable progress. It shows the practical steps members are taking and the foundations on which further action can build. The ambition focuses on the contribution the UK pet food sector can make to a sustainable food system by reducing greenhouse gas emissions, restoring nature, sourcing commodities responsibly, supporting a circular food system and reducing the environmental impact of packaging - while continuing to deliver high standards of nutrition, product safety and quality for pets.

There is a strong practical business case for action. Efficient use of energy and materials can reduce operating costs; better data and sourcing can strengthen access to ingredients; and forward planning can help businesses respond to changing regulation and customer expectations. Many members already make sustainability central to how they operate. Clear, accessible guidance and collaboration can help businesses of every size build on that progress.

The baseline shows action under way across all five pillars. Packaging has the strongest measurement base, supported by substantial work on mono-material formats and design for recyclability. Net Zero is another major focus, with members measuring emissions, improving energy efficiency and increasing use of renewable power. Nature Restoration, Sustainable Commodities and the Circular Food System also show clear foundations for further progress, including water measurement, supplier engagement and the efficient use of co-products.

The baseline draws on a survey of our members, with 26 core members and one associate member providing information. Together, the responding organisations account for around half of the cat and dog food delivered in the UK.
This gives UK Pet Food and its stakeholders a valuable, credible starting point for tracking progress over time.

UK Pet Food will use these findings to support members with practical guidance, policy engagement and opportunities for collaboration. We plan to repeat the baseline in 2028, providing an interim view of progress towards the 2030 ambitions.

"Every member has a role in delivering the 2030 ambitions, whatever their size or starting point."

By working together, the sector can accelerate progress and make a practical contribution to a sustainable food system that protects the health and wellbeing of pets.



Nicole Paley
Chief Executive
UK Pet Food

Find out more about how you can contribute to Ambition 2030 at

https://www.ukpetfood.org/what-we-do-why/sustainable-pet-food-new/sustainability-ambition-2030.html



EXECUTIVE SUMMARY

The 2026 baseline shows a sector moving from commitment to progress across all five Ambition 2030 pillars. Members are taking practical action, with the strongest foundations in packaging and Net Zero and visible momentum in nature, sustainable commodities and circular food.

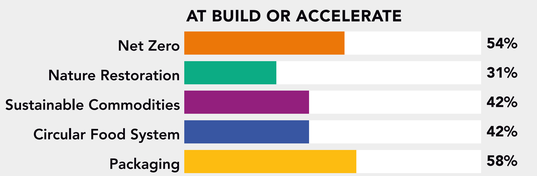
A credible first baseline

27
MEMBER RESPONSES

~50%
OF UK CAT AND DOG FOOD REPRESENTED

Twenty-six core members responded, alongside one associate member. Together, respondents represent around 50% of cat and dog food delivered in the UK, providing a substantial first view of action across the membership.

Progress is visible across all five pillars



Packaging shows the most mature action, with 58% of members at Build or Accelerate stage. Net Zero follows at 54%, while 42% are at Build or Accelerate for both Sustainable Commodities and the Circular Food System and 31% for Nature Restoration. These figures show an active base in every pillar and provide a clear benchmark for future progress.

Members are focusing on high-impact priorities

58%
PACKAGING A TOP PRIORITY

65%
NET ZERO A TOP CHALLENGE

Members are concentrating attention on areas where operational, customer and policy expectations are moving quickly. Packaging is the most frequently selected top-two priority, chosen by 58% of members, while Net Zero is the most frequently selected top-two challenge, chosen by 65%.

Collective action can unlock faster progress

31%
WANT COLLABORATION OPPORTUNITIES AND POLICY GUIDANCE

Members identified collaboration opportunities and policy guidance as the most useful forms of support, each selected by 31%. This points to a practical role for collective action: helping businesses interpret requirements, learn from peers and work across the value chain.

AMBITION 2030 AT A GLANCE

Moving from commitment to progress: member action is visible across all five pillars, with strong foundations to build on.



	OUR 2030 AMBITION	WHERE WE ARE IN 2026 (Not started / Start / Build / Accelerate)	BUILD OR ACCELERATE	ONE INDICATOR TO WATCH
1	**NET ZERO** Contribute to a 50% reduction in emissions across the agrifood supply chain.	19% / 27% / 27% / 27%	54%	38% measure Scope 1 and 2 emissions
2	**NATURE RESTORATION** Contribute to the UK's Nature Positive ambition to halt and reverse nature loss, and help pet owners protect and enjoy nature.	38% / 31% / 15% / 15%	31%	65% water use tracked
3	**SUSTAINABLE COMMODITIES** Eliminate deforestation and conversion from directly sourced ingredients.	27% / 31% / 15% / 27%	42%	46% commodity origin tracked
4	**CIRCULAR FOOD SYSTEM** Optimise the use of co-products, innovative solutions, alternative ingredients and efficient manufacturing to reduce environmental impacts.	31% / 27% / 23% / 19%	42%	46% measure food waste
5	**PACKAGING** Contribute to implementing a world-class packaging recycling system in the UK, reducing the environmental impact of packaging.	12% / 31% / 27% / 31%	58%	88% packaging volumes measured at least at a basic level

Percentages are rounded

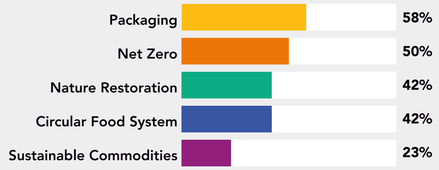
PARTICIPATION

27
Member responses

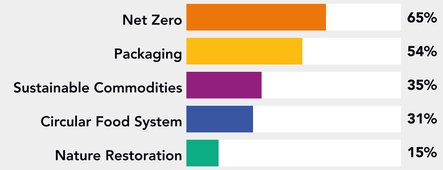
Share of cat and dog food delivered in the UK represented by respondents:

Around 50%

MEMBERS' TOP PRIORITIES



MEMBERS' TOP TWO CHALLENGES



ABOUT SUSTAINABILITY AMBITION 2030

The pet food sector is part of the wider food system.

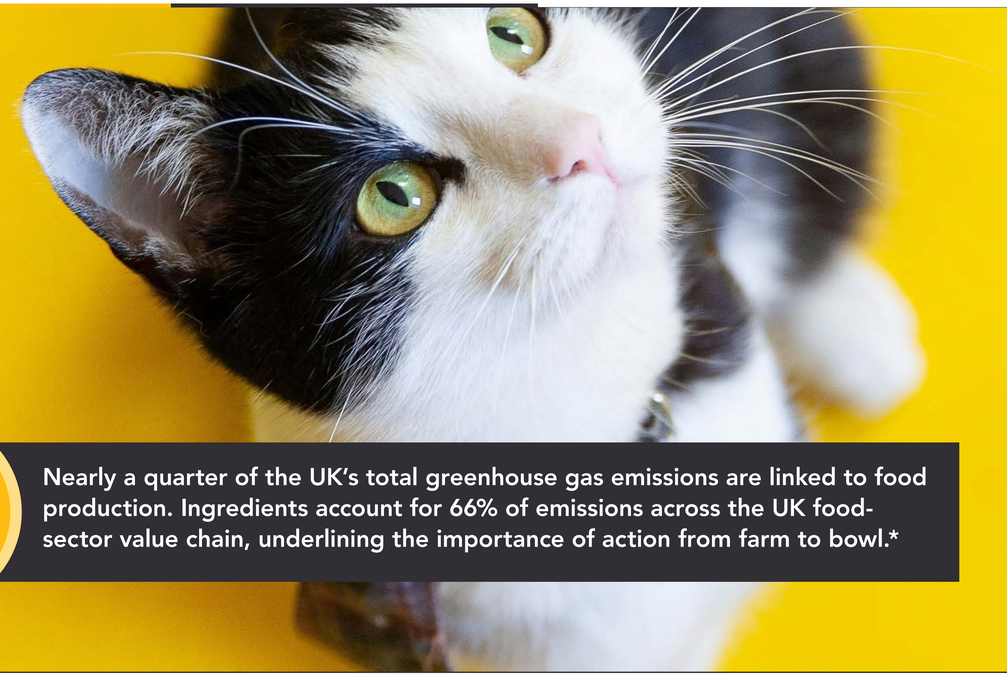
It relies on agricultural ingredients, energy, water, transport and packaging. UK Pet Food created Sustainability Ambition 2030 to focus collective action where the sector can support the transition to a sustainable food system by reducing impacts, making better use of resources and improving resilience. Pet food also helps make fuller use of safe, nutritious materials from the human food chain, contributing to resource efficiency and food system resilience.

The five focus areas were developed with members and stakeholders. Action is underpinned by five principles: advance pet health, promote animal welfare, empower responsible choices, drive collaboration and innovation, and build resilience. These principles matter because environmental progress must continue to protect the safety, nutritional quality and wellbeing of pets.

Why action makes business sense

Progress on Ambition 2030 makes sound business sense, and members are already unlocking practical gains: saving money through energy and waste reduction; strengthening supply-chain resilience; supporting market access through high packaging and commodity standards; and building trust by engaging customers and pet owners credibly on progress.

(*) UK Pet Food Sustainability Ambition 2030 Toolkit, pages 8-9, drawing on the FDF Net Zero Handbook.



Did you know?

Nearly a quarter of the UK's total greenhouse gas emissions are linked to food production. Ingredients account for 66% of emissions across the UK food-sector value chain, underlining the importance of action from farm to bowl.*

FOCUS AREA	UK PET FOOD 2030 AMBITIONS
NET ZERO	Contribute to a 50% reduction in emissions across the agrifood supply chain.
NATURE RESTORATION	Contribute to the UK's Nature Positive ambition to halt and reverse nature loss by 2030. We will help pet owners protect and enjoy nature.
SUSTAINABLE COMMODITIES	Eliminate deforestation and conversion from directly sourced ingredients.
CIRCULAR FOOD SYSTEM	Optimise the use of co-products, innovative solutions, alternative ingredients and efficient manufacturing to reduce environmental impacts.
PACKAGING	Contribute to implementing a world-class packaging recycling system in the UK, reducing the environmental impact of packaging.



PARTICIPATION & REPORTING BASIS

The Ambition 2030 baseline measures member engagement and progress in delivering on Ambition 2030.

It is designed to support transparency on industry sustainability activities and performance and will shape UK Pet Food's future support for members. It also provides insights on the implementation challenges members face and the conditions that can help the sector move forward faster.

The baseline was created through a survey which received 27 responses: 26 core members and one associate member, which was tracked separately. Across all respondents, 85% were manufacturers or pet food businesses, 11% were ingredient suppliers and 4% were associate members. Of the 26 core-member respondents, 54% were medium-sized businesses, 23% were large, 15% were small and 8% were micro businesses. The survey was completed in July 2026.

Did you know?

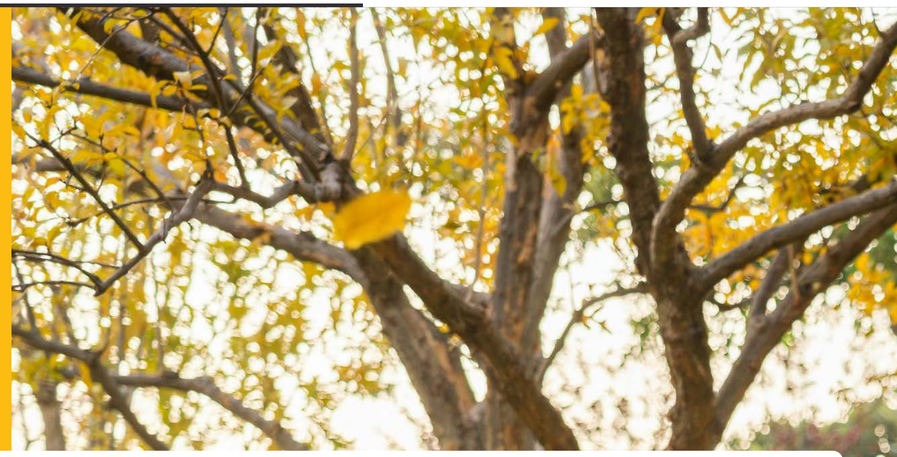
The total UK pet food market is worth around **£4.3 billion**, including wild bird food and pigeon food. (1)

Respondents account for around half of the cat and dog food delivered in the UK. The results should be read as a directional picture of the responding membership rather than a complete measure of the whole UK market. We aim to increase participation, improve data quality and track changes in performance over time.

(1) UK Pet Food Market Data Report 2026 Kantar / Soulor Consulting - https://www.ukpetfood.org/industry-hub/data-statistics-/market-data-reports.html

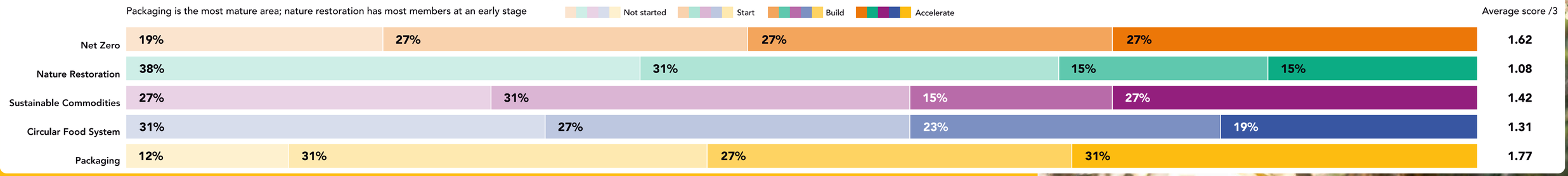
OVERALL PROGRESS ACROSS THE FIVE PILLARS

The baseline shows action under way across the UK Pet Food membership. Packaging is the most developed pillar and Net Zero also shows substantial activity, with members increasingly moving from measurement towards reduction action. In Nature Restoration, Sustainable Commodities and the Circular Food System, members are establishing the information, policies and supplier relationships needed to scale delivery.



MATURITY VARIES SIGNIFICANTLY ACROSS THE FIVE AMBITION AREAS

Packaging is the most mature area; nature restoration has most members at an early stage

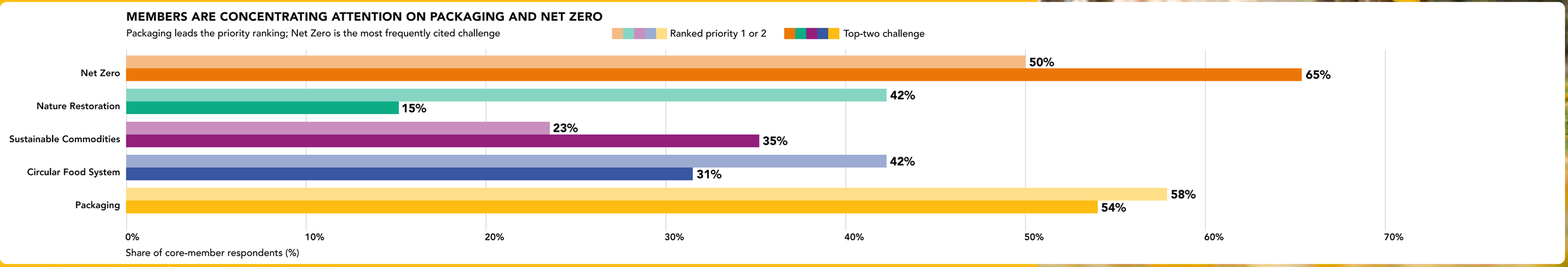


Percentages are rounded

Member priorities and challenges

MEMBERS ARE CONCENTRATING ATTENTION ON PACKAGING AND NET ZERO

Packaging leads the priority ranking; Net Zero is the most frequently cited challenge



Members ranked each pillar from 1 to 5, with 1 being the highest priority.



Packaging was ranked as a high priority (1 or 2) by 58% of members, followed by Net Zero at 50%. Nature Restoration and the Circular Food System were each selected by 42%, and Sustainable Commodities by 23%. Net Zero led the top-two challenge ranking at 65%, followed by Packaging at 54%, Sustainable Commodities at 35%, the Circular Food System at 31% and Nature Restoration at 15%.

The results show that members are focusing on two high-impact areas: the transition to lower-impact packaging and carbon emission reduction across operations and supply chains. Clarity on the business benefits and practical implementation support can help convert this focus into faster delivery.

What is helping progress

- Clear ownership of sustainability from senior leaders and operational teams.
- A performance baseline, consistent definitions and focused performance indicators.
- Targets and action plans that link environmental goals to business decisions.
- Supplier engagement and better visibility beyond members' direct operations.
- Practical guidance, examples and opportunities for members to work together.

Building high-quality information

Most respondents had at least moderate confidence in the information they supplied:

69% used a mixture of measured data and estimates

Only 12% reported low confidence

We recognise the importance of strengthening data availability, quality and comparability over time.

Five ambitions.
One shared responsibility.
Building a more sustainable pet food industry, while protecting the health and wellbeing of pets.



1 NET ZERO

Our ambition

Contribute to a 50% reduction in emissions across the agrifood supply chain by 2030.

Why this matters to the UK pet food industry

Climate change is already disrupting food systems through extreme weather, biodiversity loss and pressure on natural resources. Nearly a quarter of the UK's total emissions are linked to food production. More efficient energy use can lower costs for pet food manufacturers, while a credible emissions baseline helps members prioritise reductions and respond to customer and reporting requests. Reducing carbon emissions is vital to the long-term security of food supplies for people and pets.

Pet food businesses can act within their own operations by improving energy efficiency, moving to renewable power, reducing heat and transport emissions, and preventing waste.

A large share of food-sector emissions occurs further upstream in the production and import of ingredients. Progress requires understanding the full product lifecycle and working with suppliers to identify and reduce emissions.

Net Zero is both an operational and a value-chain challenge. A clear footprint allows pet food manufacturers to focus effort where it will have the greatest impact, while setting science-based targets and decarbonisation action plans help members move from measurement to delivery.



(2) John D. Harvey, Sarah L. Crowley, Vera Eory, Peter Alexander, Estimating the environmental impact of dog foods marketed in the UK, Journal of Cleaner Production, Volume 540, 2026, 147277, ISSN 0959-6526, https://doi.org/10.1016/j.jclepro.2025.147277.



What the baseline tells us

Net Zero has strong momentum with more than half of respondents reporting established or advanced activity, although the maturity of action varies. It is also the most frequently selected challenge, chosen by 65%, showing the priority members attach to delivery. Action is moving from operational efficiency and renewable power towards fuller value-chain measurement, target setting and supplier engagement.

INDICATOR		RESULT	WHAT IT SUGGESTS
Members at Build or Accelerate		54%	More than half of members report established or advanced activity.
Measure scope 1 and 2 emissions		38%	Members are building the foundations for operational carbon measurement.
Measure scope 3 emissions	In place	38%	Members have begun to build visibility of emissions across their value chain.
	Partially in place	31%	
Science-based targets validated or in progress		46%	Almost half have a validated target or are working towards one.
Operations using 100% renewable power		19%	A group of members has completed the transition to fully renewable operational power.
Energy use and efficiency opportunities assessed		46%	Operational efficiency is a widely used route to practical emissions reduction.

Where action is under way

Half of members report that their leadership team is aware of the organisation's carbon footprint. 46% assess energy use and improvement opportunities, and the same share use renewable power in operations. 42% have identified emissions hotspots and 42% have taken operational reduction action. 38% selected Scope 1 and 2 measurement among their reported Net Zero activities.

Members are also putting longer-term delivery structures in place: 38% have set emissions-reduction targets, 35% have an emissions-reduction plan and 31% engage suppliers on emissions. Together, these actions provide a platform for fuller carbon footprints, stronger transition plans and further measurable reductions.

Did you know?

Measuring Scope 1 and 2 operational carbon emissions is a vital first step in taking targeted emission reduction action.

CASE STUDY:

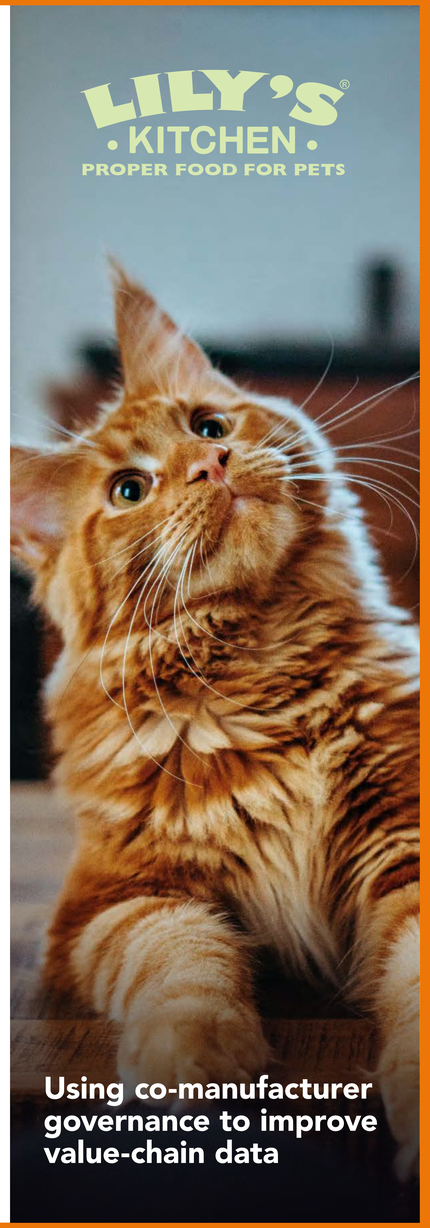
Lily's Kitchen

Primary data from co-manufacturers is giving Lily's Kitchen a stronger basis for planning value-chain emissions reductions.

What Lily's Kitchen has been working on: Lily's Kitchen holds quarterly meetings with its key co-manufacturers covering supply chain, quality and sustainability. The sustainability discussion includes annual KPIs on greenhouse gas emission reduction, renewable electricity, waste and water, alongside timely completion of data requests. The company also uses Sedex and four-pillar SMETA audits to strengthen supply-chain due diligence. Through this process, Lily's Kitchen now has primary site data for every co-manufacturer it works with and has developed a greenhouse gas reduction roadmap for each partner.

Key lessons learned: Brands that outsource production can meaningfully influence value chain emissions by building sustainability into established supplier-management processes. Consistent requests, clear KPIs and regular discussion improve data quality while helping suppliers understand the direction of travel and prepare for deeper collaboration.

Contribution towards Sustainability Ambition 2030: The approach supports the Net Zero ambition by building accurate carbon footprint information and establishing partner-specific carbon reduction plans. This will help Lily's Kitchen focus future action on the co-manufacturing, ingredient and packaging hotspots that matter most.



Using co-manufacturer governance to improve value-chain data

CASE STUDY:

Forthglade Foods

Almost 2000 rooftop solar panels provide one fifth of the electricity used at Forthglade's Okehampton factory in an average year.

What Forthglade Foods has been working on: Forthglade installed almost 2,000 solar panels across the roof of its pet food factory in Okehampton, Devon. Using existing roof space allowed the business to introduce renewable electricity generation without taking additional land or changing the site's manufacturing footprint. The project was planned around a live production environment so installation could proceed while protecting product quality, food safety and operational continuity.

Key lessons learned: Established manufacturing sites can often find practical decarbonisation opportunities within their existing footprint. Rooftop solar can reduce purchased electricity without competing for land, but successful delivery depends on close coordination between energy, engineering, production and food-safety teams.

Contribution towards Sustainability Ambition 2030: The installation contributes operational emission reductions towards the Net Zero ambition. Across an average year, the solar array generates approximately 20% of the electricity needed to operate the factory, reducing reliance on grid electricity and providing a visible example of investment in lower-carbon manufacturing.



Powering the Okehampton factory with Devon sunshine

CASE STUDY:

Alltech

Primary data from 32 farms, covering 13,360 beef cattle, is being connected with processing and pet food manufacturing data to improve value-chain carbon measurement.

What Alltech has been working on: Alltech developed and implemented the Alltech Partnership Framework, a scalable model designed to embed measurable sustainability outcomes across the value chain. Working with Buitelaar, an integrated beef business supplying raw materials to pet food manufacturers, the framework has been used to develop practical measures and drive efficiency. Farm engagement and resource-efficiency reviews were combined with PAS 2050-aligned carbon footprints across 32 farms using Alltech's E-CO2 service. The assessment was then extended through beef processing, plate-freezing and pet food manufacturing. This replaces generic emissions factors with supply-chain-specific data and supports more accurate allocation across beef outputs, including co-products used in pet food. A tiered farm framework with defined KPIs provides a route for continuous improvement.

Key lessons learned: Whole-chain measurement becomes more useful when it is paired with practical advice for producers and a shared set of improvement indicators. Primary data can reveal where action will have most value, while collaboration helps align farm efficiency, profitability and downstream Scope 3 requirements.

Contribution towards Sustainability Ambition 2030: The initiative supports the Net Zero ambition by improving the accuracy and traceability of value-chain emissions data. Initial results indicate that participating farms are performing below the average footprint of comparable UK beef systems. Follow-up assessments are intended to quantify reductions and efficiency improvements.



2 NATURE RESTORATION

Our ambition

Contribute to the UK's Nature Positive ambition to halt and reverse nature loss by 2030. We will help pet owners protect and enjoy nature.

Why this matters to the UK pet food industry

The pet food sector depends on healthy natural systems for ingredients, water and resilient agricultural supply chains. Biodiversity loss can restrict ingredient availability and increase costs. The State of Nature 2023 assessment found that nearly one in six of more than 10,000 species assessed in Great Britain is at risk of extinction. Understanding dependencies on nature and reducing impacts supports responsible sourcing and continuity of supply.

The most significant nature impacts are often linked to ingredient production. Deforestation and land conversion, water use, farming practices and the use of agricultural chemicals can all affect habitats and species. The nature impact of the same ingredient can vary substantially by place and production method, which makes knowledge of sourcing locations and supplier practices especially important.

Members can also improve habitats at manufacturing sites and help pet owners protect and enjoy nature responsibly. Pets create everyday connections with the natural world: a UK study found that dog owners were four times more likely to meet recommended physical-activity levels, while UK Pet Food research found that 58% of households with outdoor space fed wild birds in 2022.



(3) Sources: State of Nature Partnership, State of Nature 2023; Westgarth et al., Scientific Reports (2019); UK Pet Food, wild-bird feeding survey (2022); UK Pet Food Sustainability Ambition 2030 Toolkit, pages 13–17.



What the baseline tells us

Nature Restoration is an emerging area of action. Members are starting work to track nature impacts and build understanding of the regions they are sourcing from, key foundations for taking targeted action to reduce nature impacts. Members' understanding of water impacts is more mature.

INDICATOR	RESULT	WHAT IT SUGGESTS
Members at Build or Accelerate	31%	Almost a third report established or advanced activity.
Nature impacts tracked to some extent	38%	More than a third of members have begun to build insights on their nature impacts.
Water use tracked	65%	Water data provides a strong operational starting point.
Key ingredients or sourcing regions identified	54%	More than half have begun to locate potential nature exposure.
Beginning to assess nature-related risks	50%	Half of members are moving from awareness towards assessment.

Where action is under way

Qualitative assessment can help members locate their most important nature dependencies and impacts, with priority ingredients, sourcing regions and key suppliers providing practical places to begin. The foundational work underway helps members prepare for more systematic management of nature impacts.

A smaller group of members report more established action. 19% of members have nature-impact measures in place and the same share are already supporting nature restoration projects. 12% have set nature targets, demonstrating early leadership in translating assessment into action.

Did you know?

65% of members track water use—a strong foundation for identifying operational risks and opportunities.

CASE STUDY:

Purina UK&I

Purina is supporting a programme that plans to establish four million young native oysters off the North Norfolk coast.

What Purina has been working on: Purina is working with marine conservation organisation Oyster Heaven to rebuild native oyster reefs in the North Sea. Between 2025 and 2027, Oyster Heaven plans to deploy 40,000 biodegradable clay structures, known as Mother Reefs. These are intended to host four million young oysters and form the basis of a larger self-sustaining reef. The partnership is part of Purina's wider European Ocean Restoration Programme, which aims to help restore 1,500 hectares of marine habitat by 2030.

In April 2026 Purina held a two-day London event featuring live seawater-filtration demonstrations and marine experts. Hundreds of visitors attended. Purina links its interest in marine habitats to fish ingredients, primarily co-products from human food production, used in many of its recipes.

Key lessons learned: Nature restoration can be accelerated when businesses connect action to their value chain, collaborate with specialist partners and build in long-term monitoring. Visible customer-facing demonstrations and a specialist partner can make marine restoration more accessible to pet owners.

Contribution towards Sustainability Ambition 2030: The partnership supports the ambition to help halt and reverse nature loss and helps pet owners understand marine habitats. The planned deployment of four million oysters is expected to bring significant marine biodiversity and water-quality benefits.



Working with Oyster Heaven to support native oyster reef restoration

3 SUSTAINABLE COMMODITIES



Our ambition

Eliminate deforestation and conversion from directly sourced ingredients by 2030.

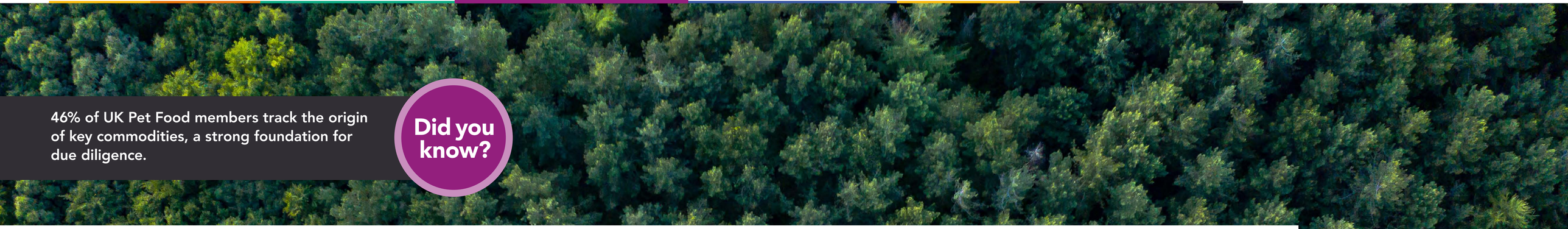
Why this matters to the UK pet food industry

Pet food ingredients come from global supply chains. Agriculture is a leading cause of the loss of forests and other important ecosystems contributing to biodiversity loss and greenhouse gas emissions. Common pet food ingredients and their feed inputs, which can include soy, can be linked to deforestation and land conversion, creating risks for climate, nature, human rights and the long-term security of supply.

Risks can arise through commodities bought directly, as well as through soy and other feeds used to produce meat and seafood ingredients. Paper and pulp in packaging can also be sourced from regions with deforestation risk.

Building traceability of ingredients is a key first step in understanding risks. This becomes harder in long or aggregated supply chains, and can be particularly difficult where co-products are used. For this reason the UK Pet Food ambition is focused on areas of member control and direct ingredient sourcing.

Action in this area supports members to enhance the resilience of sourcing and to prepare for evolving regulatory requirements.



Did you know?

46% of UK Pet Food members track the origin of key commodities, a strong foundation for due diligence.

What the baseline tells us

Progress on Sustainable Commodities is building momentum. 42% of members placed themselves at Build or Accelerate stage and members are working to understand relevant certification schemes. Understanding commodity origin and setting standards are key first steps in improving commodity sustainability and uptake suggests action is under way. Supplier engagement is a key step to driving performance improvements and member action in this area suggests that practical steps are being taken to reduce supply chain sustainability risks.

INDICATOR	RESULT	WHAT IT SUGGESTS
Members with >75% of key commodities certified or verified	**27%**	More than a quarter report high levels of independent assurance.
Awareness of relevant certification schemes	**54%**	More than half have identified routes to strengthen commodity sourcing.
Commodity origin tracked	**46%**	Almost half have a foundation for traceability and due diligence.
Sustainable sourcing policy in place	**46%**	Almost half are setting clear supply-chain expectations.
Suppliers engaged on sustainable sourcing	**42%**	Members are extending action into their value chains.

Where action is under way

46% of members track the origin of key commodities. The same share have a sustainable sourcing policy, 42% engage suppliers on sustainable sourcing practices and 38% have processes to identify forest-risk commodities. 27% actively support supply-chain improvements, showing how policy and traceability can translate into practical action.

The results show that members are establishing the foundations for deforestation- and conversion-free sourcing: understanding risk, setting expectations and working with suppliers. Greater traceability and consistent supplier information can help more businesses build on this progress.

Did you know?

Forest-risk commodities relevant to food supply chains can include cattle, palm oil, soy and wood. Risks may arise through direct purchases or indirectly through animal feed and packaging.

CASE STUDY:

Naturaw

Naturaw manufactures in Yorkshire using 100% British meat, giving the business closer oversight of suppliers and greater visibility of ingredient provenance.

What Naturaw has been working on: Naturaw has built its sourcing model around shorter, more transparent supply chains. It sources 100% British meat, prioritises high-welfare ingredients and manufactures at its own solar-powered facility in Yorkshire. Naturaw focused on increasing traceability and reducing exposure to high-risk global commodity supply chains through a combination of sourcing, procurement and operational decisions. The business also uses nutrient-rich co-products and cuts from animals already entering the food chain, helping to make fuller use of existing resources.

Key lessons learned: Shorter supply chains can make traceability easier when they are combined with clear supplier standards. Direct manufacturing also helps a business connect procurement decisions with product design, animal welfare, resource efficiency and environmental risk.

Contribution towards Sustainability Ambition 2030: This supports the Sustainable Commodities ambition by enhancing provenance and traceability. This provides a strong foundation for identifying and managing deforestation and conversion risk.



Using shorter supply chains to strengthen ingredient provenance

4 CIRCULAR FOOD SYSTEM

Our ambition

Optimise the use of co-products, innovative solutions, alternative ingredients and efficient manufacturing to reduce environmental impacts.

Why this matters to the UK pet food industry

A circular food system makes the best use of available resources and prevents valuable materials from becoming waste. Globally, 25% to 30% of food is lost or wasted, accounting for 8% to 10% of greenhouse gas emissions. Preventing loss and waste can reduce emissions, ease pressure on natural systems and improve operational efficiency.

Circularity is already inherent in parts of the pet food system. The sector makes productive use of nutritious co-products from the human food chain, creating value from materials that might otherwise be underused and helping make fuller use of animals and crops already produced for food. Increasingly, this established role is being complemented by innovation in alternative ingredients, manufacturing efficiency and food-waste prevention.

The opportunity extends beyond ingredients: manufacturers can prevent avoidable losses by improving efficiency in production, storage and transport.



(4) https://unfccc.int/news/food-loss-and-waste-account-for-8-10-of-annual-global-greenhouse-gas-emissions-cost-usd-1-trillion



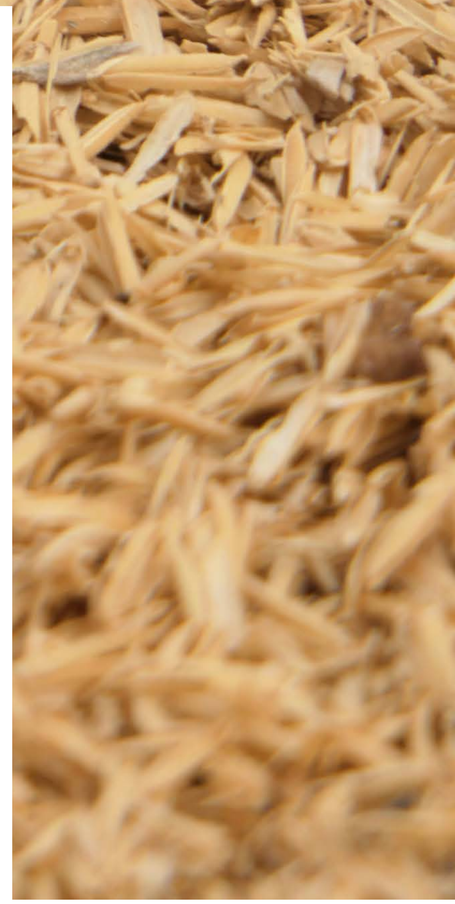
What the baseline tells us

Progress on circularity is well under way for many members. Action on manufacturing food circularity is particularly strong with members working to quantify food waste and reviewing operations to identify improvement opportunities. Members are also starting to track the volumes of lower-impact ingredients they use.

INDICATOR	RESULT	WHAT IT SUGGESTS
Members at Build or Accelerate	42%	A substantial group reports established or advanced activity.
Measure food waste	46%	Almost half of members measure food waste in their operations.
Production losses reported at 5% or less	62%	Most members report relatively low levels of production loss.
Operational food waste reviewed	58%	A majority are systematically identifying prevention opportunities.
Products being designed or reformulated to reduce impacts	35%	More than a third are applying circular thinking to product design.

Where action is under way

58% of members have reviewed food waste in their operations, 54% understand the volumes of lower-impact ingredients they use and 46% measure food waste. 35% engage suppliers to improve ingredient circularity, and the same share report product design or reformulation to reduce environmental impacts. 23% have food-waste targets, while 19% report using lower-impact or alternative ingredients.



CASE STUDY:

MiAlgae

MiAlgae is producing a DHA-rich omega-3 ingredient from Scotch whisky industry co-products, creating a new source of nutrition for pet food with less reliance on marine resources.

What MiAlgae has been working on: MiAlgae has developed a fermentation process that uses nutrient-rich material from whisky production to cultivate microalgae naturally rich in long-chain omega-3. The resulting dried ingredient is designed for pet food formulations as an alternative to conventional fish-derived omega-3. MiAlgae has scaled the technology from the laboratory to commercial production in Scotland, alongside work to demonstrate product quality, palatability, stability and practical use.

Key lessons learned: The approach demonstrates how pet food can participate in a wider circular food system, connecting previously separate industries so that co-products from one process become resources for another while reducing reliance on finite marine resources.

Contribution towards Sustainability Ambition 2030: The initiative supports the Circular Food System ambition by retaining nutrients in productive use and connecting two Scottish supply chains. It can also reduce demand for wild fish and reduce greenhouse gas emissions compared with fish-derived omega-3.



Turning whisky industry co-products into sustainable omega-3 for pet nutrition

CASE STUDY:

Omega Proteins Ltd

Omega Proteins converts animal co-products from the UK food chain into fresh, frozen and rendered protein and fat ingredients for pet food and aquafeed.

What Omega Proteins does: Omega Proteins, a subsidiary of the Leo Group, collects animal co-products that are not intended for human consumption from abattoirs, cutting plants and butcher shops. At their facility in Halifax, materials are prepared, minced, chilled and plate-frozen into custom blends for wet pet food. At Penrith, a large-scale rendering plant produces protein meals and tallow oils for wet and dry pet food and aquafeed. Omega uses its own specialist vehicles and its sites and processes are approved and regulated by the Animal and Plant Health Agency, supporting control and traceability throughout the process.

Key lessons learned: Making safe, useful ingredients from animal co-products depends on ensuring product quality, safety, and traceability. Making productive use of co-products provides a valuable income stream for abattoirs.

Contribution towards Sustainability Ambition 2030: The initiative supports the Circular Food System ambition by providing a sustainable route for animal co-products that keeps valuable nutrients, proteins and minerals within the food system rather than going to waste.



Keeping nutrients from the meat supply chain in productive use

5 PACKAGING

Our ambition

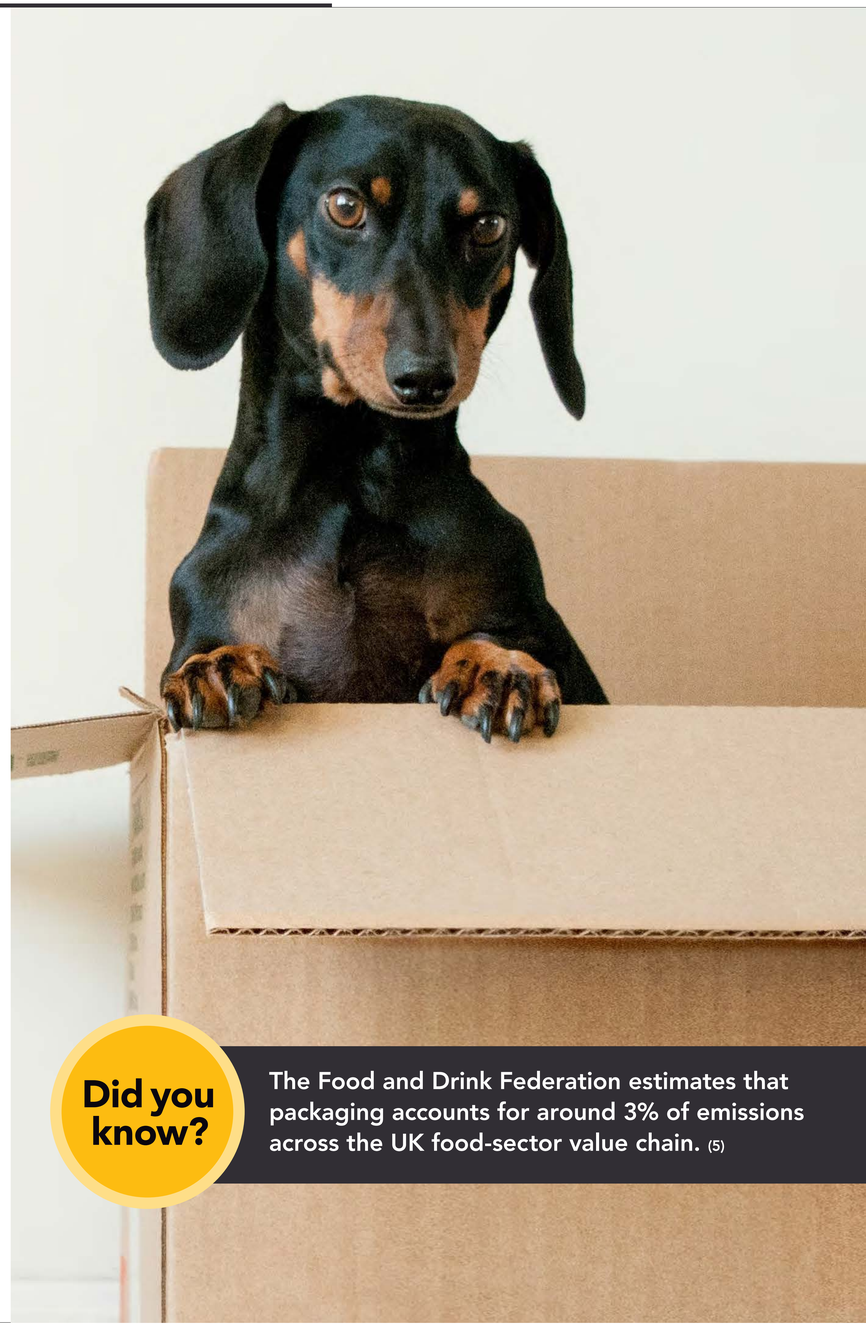
Contribute to implementing a world-class packaging recycling system in the UK, reducing the environmental impact of packaging.

Why this matters to the UK pet food industry

Packaging protects pet food from damage and contamination, preserves quality, extends shelf life and gives pet owners important product information. These functions prevent food waste and protect pet health.

Packaging accounts for around 3% of food-sector greenhouse gas emissions, but its impacts are highly visible when material is not kept in circulation. UK Pet Food members are making substantial progress by reducing material use, shifting to mono-material formats and improving recyclability while continuing to protect product quality and pet health.

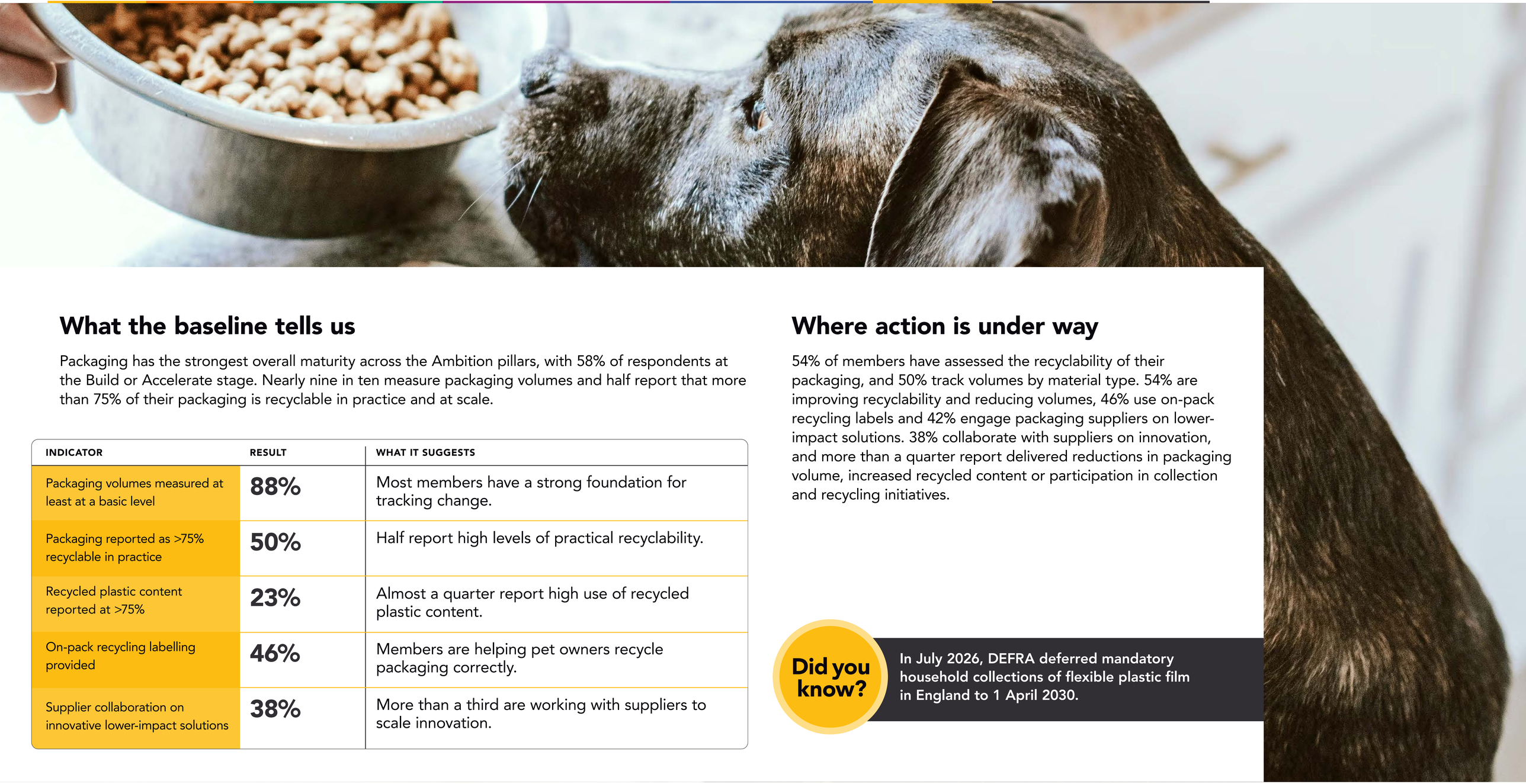
Continued progress on packaging depends on decisions by manufacturers, suppliers, retailers, recyclers, local and national government, and consumers. UK Pet Food members can reduce unnecessary material, improve design, increase recycled content where suitable for food contact and label packs clearly. A world-class packaging recycling system also requires aligned rules, collection, sorting and recycling capacity. The delay to kerbside collection of flexible plastic packaging in England until 2030 means consumers will continue to face challenges recycling pouches and other flexible formats. Different requirements across the UK and EU can make a single packaging design difficult to implement, and changes must continue to drive simplicity for consumers, protect product quality and avoid food waste.



Did you know?

The Food and Drink Federation estimates that packaging accounts for around 3% of emissions across the UK food-sector value chain. (5)

(5) Source: Food and Drink Federation, Ambition 2030: Packaging, drawing on the FDF Net Zero Handbook.



What the baseline tells us

Packaging has the strongest overall maturity across the Ambition pillars, with 58% of respondents at the Build or Accelerate stage. Nearly nine in ten measure packaging volumes and half report that more than 75% of their packaging is recyclable in practice and at scale.

INDICATOR	RESULT	WHAT IT SUGGESTS
Packaging volumes measured at least at a basic level	**88%**	Most members have a strong foundation for tracking change.
Packaging reported as >75% recyclable in practice	**50%**	Half report high levels of practical recyclability.
Recycled plastic content reported at >75%	**23%**	Almost a quarter report high use of recycled plastic content.
On-pack recycling labelling provided	**46%**	Members are helping pet owners recycle packaging correctly.
Supplier collaboration on innovative lower-impact solutions	**38%**	More than a third are working with suppliers to scale innovation.

Where action is under way

54% of members have assessed the recyclability of their packaging, and 50% track volumes by material type. 54% are improving recyclability and reducing volumes, 46% use on-pack recycling labels and 42% engage packaging suppliers on lower-impact solutions. 38% collaborate with suppliers on innovation, and more than a quarter report delivered reductions in packaging volume, increased recycled content or participation in collection and recycling initiatives.

Did you know?

In July 2026, DEFRA deferred mandatory household collections of flexible plastic film in England to 1 April 2030.

CASE STUDY:

Benyfit Natural

Benyfit Natural makes all its raw food tubs from 100% Prevented Ocean Plastic, creating demand for recycled material collected in coastal communities where it was at risk of entering the ocean.

What Benyfit Natural has been working on: Benyfit Natural partnered with the Prevented Ocean Plastic programme to change the material used across its raw food range. The programme collects plastic from coastal towns and cities at risk of ocean plastic pollution and supplies recycled plastic at commercial scale. Benyfit Natural's tubs now use 100% Prevented Ocean Plastic and are recyclable. Its Benyfit Bites treat packaging, cardboard boxes and sleeves are also recyclable.

Key lessons learned: Packaging action can address material circularity and plastic-pollution risk at the same time. Moving a whole product range to recycled content can create consistent demand and make change visible to customers. Clear labelling, design for recyclability and suitable collection infrastructure are important to ensuring that tubs are recycled at end of use.

Contribution towards Sustainability Ambition 2030: The partnership supports the Packaging ambition by increasing recycled content and keeping plastic in productive use. It also supports a collection model intended to prevent plastic from reaching the ocean and provide employment in participating communities.



IMPLICATIONS & NEXT STEPS

What will help the sector go further

The baseline shows member action under way across every pillar. Members are moving from awareness and first measures towards targets, supplier engagement and delivery. The member survey highlighted four enabling conditions that can help the sector build on this progress:

Supportive and aligned public policy. Clear, stable and workable rules - across packaging, recycling, sustainable sourcing, due diligence and environmental claims - give businesses the confidence to invest. Delivery also depends on collection, recycling and data infrastructure that works across the UK.

Practical routes into action. Clear, simple guidance can help businesses take the first steps needed to measure operational carbon baselines, understand nature dependencies, strengthen sourcing foundations and identify opportunities for food-waste prevention and wider circularity.

Value-chain collaboration and information. Progress on Scope 3 emissions, nature, commodities and packaging depends on reliable information from suppliers and other partners, alongside opportunities to share practical experience.

Support that works for businesses of every size. Straightforward tools, training, case studies and peer learning can help smaller companies participate while enabling more advanced members to accelerate innovation and measurable outcomes.



Member priorities for support

UK Pet Food used the survey of members to identify how best to support members. The strongest demand is for practical help that enables businesses to interpret requirements and learn from peers. Collaboration opportunities and policy guidance were each selected by 31% of members. Training and webinars were selected by 23%, tools and templates by 15%, case studies and best practice by 12%, and advocacy by 8%. We will be using these insights to shape our programming and the next steps in Ambition 2030 delivery.

UK Pet Food's next steps

UK Pet Food will use the findings from this first baseline, alongside further engagement with members and our Sustainability Committee, to shape future priorities and identify where collective action can make the greatest difference. This will include exploring opportunities for practical guidance, knowledge sharing, collaboration and policy engagement, with a focus on helping members overcome common challenges and accelerate delivery. We also plan to repeat the baseline in 2028 to assess progress towards our 2030 ambitions.

This first baseline is a starting point rather than an endpoint. By measuring progress consistently, sharing what works and working collectively on the barriers no individual business can solve alone, UK Pet Food and its members can accelerate progress towards the 2030 ambitions.

→ **Find out more about how you can contribute to Ambition 2030 at**
https://www.ukpetfood.org/what-we-do-why/sustainable-pet-food-new/sustainability-ambition-2030.html

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