Our Life Policy Research

Notes on takeaways

The UK fast-food market

In 2006, the global fast food market grew by 4.8% and reached a value of £102.4 billion and a volume of 80.3 billion transactions. In India alone, the fast food industry is growing by 41% a year[i]. Takeaway food is fast becoming a significant part of global diets.

While the UK's fast food industry is not growing at quite that speed, unlike many other markets it has benefited from the recession. While the leisure sector on a whole has seen a closure rate of approximately 10%, fast-food restaurants in the UK's top ten cities have risen by 8.2% to more than 1,450, according to a survey by market analysts[ii].

The *Food for Thought* review of fast-food outlets found that the most successful brands have been Domino's, Eat and Prêt A Manger. Burger King has been the least successful, having closed 11.8% of its outlets in the top 10 cities which include London, Edinburgh, Manchester and Cardiff.

Pizza chain Domino's has increased its presence by a whopping 50%, while healthy fast-food group Eat boosted its portfolio by 36.4% and sandwich chain Prêt A Manger by 29.7%.

Across all 705 UK town centres analysed by the *Food For Thought* report, sandwich chain Subway grew the most, increasing its portfolio by 25.9% to 734 units. This has led many market commentators to conclude that the fast-food franchise model is largely recession proof and a robust investment.

Independent operators (with less than five outlets) have increased their market share by 2.2% across the UK's top ten cities to further fuel the feeling that many high streets are becoming dominated by takeaway outlets.

Takeaway prevalence

Nationally, one in six meals are now eaten out of the home, amounting to more than £10 billion each year being spent on sandwiches, chips, burgers, curries and other fast-food from small independent outlets (Heart of Mersey, 2011 www.heartofmersey.org.uk).

Did you know?

- Nearly a third of under-threes eat at least one takeaway a week and 19% are fed takeaways or adult ready meals every day.

- Among babies aged nine to 12 months, 20% had a takeaway once a week.
- One in three Britons eat takeaways at least once a week.
- 7% of adults - more than three million individuals - eat takeaways at least twice a week.
- The middle classes are Britain's biggest buyers of takeaways. The average middle-class Briton gets through 2.23 takeaway meals a month.

The health risks of takeaway food

Evidence suggests that fast food consumption is increasing in the UK.[iii,iv] While the balance of whether this is demand or supply led remains a point for debate, the public health implications are huge.

Diets consisting of high levels of salt, saturated fats and sugars are all linked with obesity and chronic illness. The high energy density of takeaway foods and the associated impact on the burden of disease is emphasised in the Foresight Report 'Tackling Obesities'[v]. To put our demand for takeaway food in context, currently it is thought that overall men derive a quarter of their energy and women a fifth from these foods.[vi]

Did you know?

- 6g of salt per day is the recommended level for an adult. For a single meal 2.4g is the recommended level. A takeaway beef, green peppers, black bean sauce and fried rice contains 27.6g of salt. That's over 400% of an adult's recommended daily allowance.
- A takeaway pepperoni pizza contains over 150% of a male's RDA of fat.
- The average takeaway sweet and sour chicken with boiled rice contains approximately 1450 calories, which is over 72% of a woman's calorific GDA.
- A Burger King Bacon Double Cheeseburger bought in Brazil contains 3.2g of salt, while one bought in the UK contains much less at 2.1g of salt per burger.

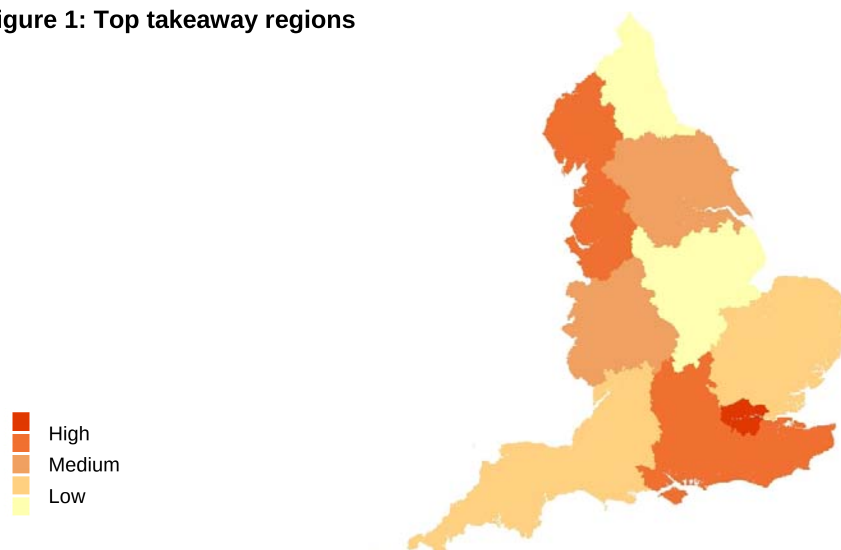
Are there too many takeaways?

Many people and organisations think there are too many takeaways. The previous government's strategy for England '*Healthy Weight, Healthy Lives*' produced in 2008, mentions the use of planning regulations and states that action is required to allow local authorities to manage proliferations of fast food outlets. The public health guidance on 'prevention of cardiovascular disease at population level' provided by the National Institute for Clinical Excellence (NICE) goes further, recommending as specific policy goal the need to '*empower local authorities to influence planning permission for food retail outlets in relation to preventing and reducing cardiovascular disease*'[vii]

Analysis by The School Food Trust carried out in 2008 produced a measure of the ratio of fast-food outlets (including confectionery shops) to secondary schools. The national average was 23 outlets per secondary school, with an urban average of 25 outlets per school[viii]. Despite the introduction of nutrient-based standards for food served in secondary schools in 2009, recent annual results from the School Food Trust indicates the national average for uptake of school lunches in secondary schools is 35.8%. This means that 64.2% of pupils are going elsewhere for their lunches and the likelihood is, given the prevalence of takeaways, that they are substituting healthier school lunches for fast-food.

Our Life's own community-led *Talking Food: Taking Action* campaign across the North West, sought to explore citizens' relationships with food and the system that delivers it, from field to fork. Specifically, *Talking Food: Taking Action* focused on deliberating the barriers that individuals and communities encounter in trying to eat a healthy diet. Evidence from the 120 citizens taking part in the process shows that the proliferation of takeaway outlets is a cause for concern. 'Too many fast food stores and takeaways' was voted as a top priority by 27% of participants and is more of a concern in local areas than high food prices.

Figure 1: Top takeaway regions



Why have the number of takeaways increased?

Over the past ten years effort to regenerate inner urban town and city centres has led to the growth and development of an improved day and night time economy. These improvements have increased footfall within our urban centres and this has created new commercial opportunities. Synonymous with these new opportunities has been a growing market for eating out and for quick, easy and affordable food to eat on the go.

Within the Town and Country Planning classification takeaways are classed as land use A5.

The main drivers of class (A5) hot takeaway outlets entering supply is three fold:

1. Change of use – other uses changing to A5;
2. Windfall sites – sites that come forward as Brownfield sites that are not planned for – typically through businesses going bust;
3. Planned development – A1, A2, A3, A5 as part of planned Brownfield site development.

Typically it is through the ‘change of use’ supply route that takeaways have increased their relative position on UK’s high streets.

Can the planning system restrict new takeaways opening?

Yes, the planning system can be used to restrict the number of new takeaway food outlets.

Supplementary Planning Documents provide the best legislative means for an A5 takeaway moratorium.

Supplementary Planning Documents (SPDs) are issued under Regulation 17 of the Town and Country Planning Regulations 2008. SPD’s typically address planning problems at the ‘sharp end’ and are heavily consulted on before they go to council. A typical SPD could be an area master-plan or a residential design guide or notably in areas where there are lots of students on houses in multiple occupancy.

The key guidance document for this as it relates to takeaways is the Government’s Planning Policy Statement 12: Local Spatial Planning (2008).

Following adoption of a takeaways SPD, the Local Development Framework would remain the starting point when determining planning applications for the development or use of land but the SPD would provide a further layer of control/reference.

SPDs have been used to effect in St. Helens, Waltham Forrest, Brent, Barking and Dagenham and Stoke-on-Trent.

Other approaches to tackling takeaways

Other approaches to limiting the prevalence of fast-food outlets include:

- Numerous studies suggest that as the price of a food increases, consumption of that food decreases[ixx]. One approach put forward is to tax the nutrient contents of foods, such that those containing more fat or salt are taxed more heavily. Alternatively, particular types of foods such as snacks or soft drinks could be subject to a tax; or VAT could be extended to foods that are currently zero-rated but have a high fat content. Revenue from a 'fat tax' could be used in various ways, such as financing subsidies for healthy foods or exercise equipment, or funding advertising campaigns for healthy eating in schools. Alternatively, it could form part of general government receipts;

- Use bylaws to regulate the opening hours of takeaways and other food outlets, particularly those near schools that specialise in foods high in fat, salt or sugar;
- Use existing powers to set limits for the number of takeaways and other food outlets in a given area. Directives should specify the distance from schools and the maximum number that can be located in certain areas;
- Help owners and managers of takeaways and other food outlets to improve the nutritional quality of the food they provide. This could include monitoring the type of food for sale and advice on content and preparation techniques.

Contacts

To discuss any of the above briefing, please contact:

Andrew Taylor
Food Campaigns Officer
+44 (0)161 233 7500
andrew.taylor@ourlife.org.uk

Appendix 1

SUMMARY GUIDE TO USE CLASSES ORDER AND PERMITTED CHANGES OF USE

Use Classes Order Including 2006 Amendment (See note 1)	Use Classes Order 1972	Description	General Permitted Development (Amendment) Order 2006 (see n 2)
A1 Shops (see note 3)	Class I	Shops, retail warehouses, hairdressers, undertakers, travel and ticket agencies, post offices, dry cleaners, Internet Cafes etc.	No permitted changes
		Pet shops, Cat-meat shops, Tripe shops, sandwich bars	No permitted changes
		Showrooms, domestic hire shops, funeral directors	No permitted changes
A2 Financial and Professional Services (see note 3)	Class II	Banks, Building societies, estate and employment agencies, Professional and Financial Services, betting offices	Permitted change to A1 where a ground floor display window exists.
A3 Restaurants and Cafes		Restaurants, snack bars, cafes	Permitted change to A1 or A2
A4 Drinking Establishments		Pubs and bars	Permitted change to A1, A2, A3
A5 Hot Food Takeaways		Hot Food Takeaway	Permitted change to A1, A2, A3
Sui Generis (see note 4)		Shops selling and/or displaying motor vehicles, retail warehouse clubs, launderettes, taxi or vehicle hire businesses, amusement centres, petrol filling stations	No Permitted change
B1 Business (see note 5)	Class II (a)	Offices, not within A2	Permitted change to B8 where no more than 235m²
	(b)	Research and development, studios, laboratories, high technology	Permitted change to B8 where no more than 235m²
	Class III (c)	Light Industry	Permitted change to B8 where no more than 235m²
B2 General Industry (see note 6)	Class IV-IX	General Industry	Permitted change to B1 or B8 B8 limited to no more than 235m²
B8 Storage or Distribution	Class X	Wholesale warehouses, distribution centres, repositories	Permitted change to B1 where no more than 235m²
Sui Generis		Any works registerable under the Alkali, etc. Works Regulation Act 1906	No Permitted change
C1 Hotels (see note 7)	Class XI	Hotels, boarding and guest houses	No Permitted change
C2 Residential Institutions	Class XII	Residential schools and colleges	No Permitted change
	Class XIV	Hospitals and convalescent/nursing homes	No Permitted change
C3 Dwelling Houses (see note 8)		Dwellings, small businesses at home, communal housing of elderly and handicapped people	No Permitted change
Sui Generis		Hostel	No Permitted change
D1 Non-residential Institutions	Class XIII	Places of worship, Church Halls	No Permitted change
	Class XV	Clinics, health centres, crèches, day nurseries, consulting rooms	No Permitted change
	Class XVI	Museums, public halls, libraries, art galleries, exhibition halls	No Permitted change
		Non - residential education and training centres	No Permitted change
D2 Assembly and Leisure	Class XVII	Cinemas, music and concert halls	No Permitted change
	Class XVIII	Dance, Sports halls, Swimming baths, skating rinks, gymnasiums	No Permitted change
		Other indoor and outdoor sports and leisure uses, bingo halls	No Permitted change
Sui Generis (See note 4)	Class XVII	Theatres, night-clubs, casinos	Permitted change from casino to D use

[i] World Watch Institute
[ii] Local Research Company
[iii] McDonald's profits jump by 23%... http://news.bbc.co.uk/1/hi/business/8475860.stm
[iv] Fast-food boost lifts KFC owner… http://news.bbc.co.uk/1/hi/business/4312394.stm
[v] *Tackling Obesities: Future Choices*, the Foresight Report.
[vi] Food Standards Agency www.food.gov.uk
[vii] *Prevention of cardiovascular disease at population level*, NICE, June 2010.
[viii] School Food Trust Website.2008. Temptation Town Research. Available at: http://www.schoolfoodtrust.org.uk/news-events/news/new-research-reveals-the-scale-of-junk-foodtemptation
[ix] French, S.A. (2003). "*Pricing effects on food choices*". Journal of Nutrition 133 (3): 841–843. http://jn.nutrition.org/cgi/content/full/133/3/841S
[x] Cinciripini, P.M. (1984). "*Changing food selections in a public cafeteria: an applied behavior analysis*". Behavioral Modification 8 (4): 520–539.