Association for Public Service Excellence

A New Meal Deal

Securing the future of school food



www.apse.org.uk

www.theschoolfoodpeople.co.uk

Who you will hear from today

APSE

Association for Public Service Excellence

A not-for-profit local government body working with over 300 councils across the UK.

Runs one of the largest research programmes on frontline council services.

Today: council services, funding and procurement

The School Food People

The national voice for school catering in England and Wales

Representing caterers since 1989 and advising Government on healthy eating policy.

Gives members the skills and support to keep up with a changing sector.

Today: kitchens, workforce, suppliers and standards

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8.9 million pupils, and the number is still rising

8.9m

pupils in England's schools in 2025/26

Almost 1.6 million infants took a free meal on census day. Infant lunch take-up rose from 88.2% to 88.4%.

26.5%

eligible for free school meals

Up from 25.7% in 2024/25. That is more than 2.2 million children.

720,000

more children expected to claim in 2026/27

Compared with 2023/24, once Universal Credit families are eligible. Department for Education modelling, assuming 89% take-up.

More entitlement without more kitchens, equipment and skilled staff risks a promise the system cannot keep.

Source: A New Meal Deal, APSE and The School Food People, 2026

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A school meal does more than feed a child

£500+

saved per eligible child, every year

Families in London's free school meals expansion. 84% said it helped household finances and 33% said it reduced debt.

2 weeks

extra reading progress by Year 6

University of Essex research on universal free school meal access.

22.2%

of children are obese by end of primary

Up from 10.5% when they start school, and nearly 30% in more deprived areas.

The sector also supports up to 100,000 direct local jobs and spends an estimated £1.16 billion a year on food.

Source: A New Meal Deal, APSE and The School Food People, 2026

What a school meal sells for, and what it costs

£2.75 – £3.20

Reported primary meal prices

What most respondents charge

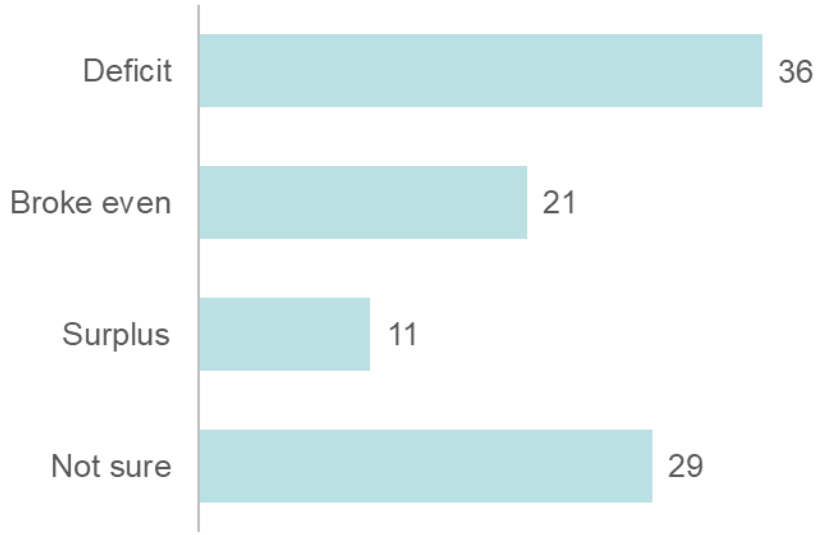
£3.25 – £4.25

Commonly reported full cost

Sometimes considerably more

Result for the latest complete financial year

% of respondents

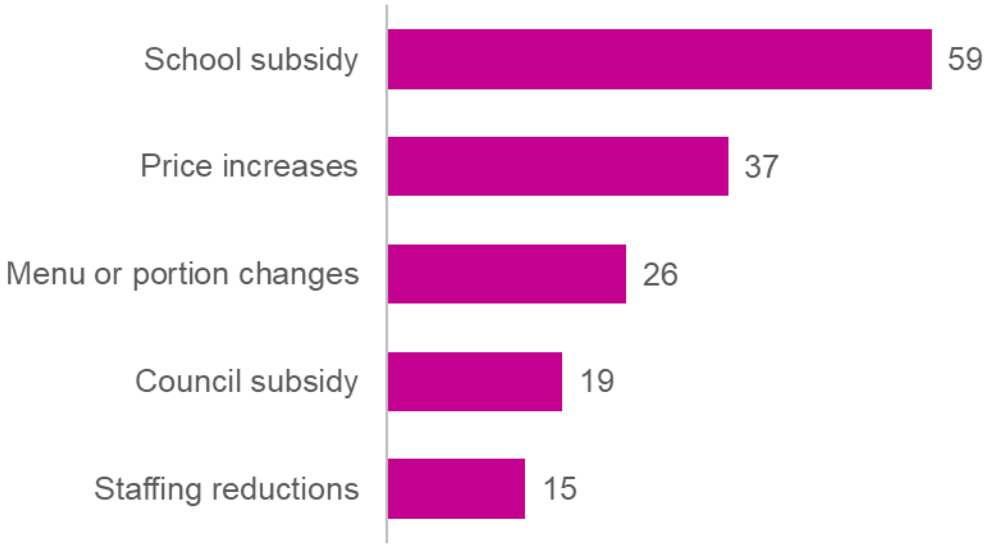


Source: A New Meal Deal, APSE and The School Food People, 2026

Who pays when the price does not cover the cost

How the gap is covered

% of respondents who explained how they cover it



71%

of respondents who answered were not confident their service will stay financially sustainable over the next three years.

Source: A New Meal Deal, APSE and The School Food People, 2026

Council school meal services are already closing

CATERed, Plymouth: a council-backed co-operative serving 59 schools. Ended school meals in July 2026.

Leicestershire Traded Services: closed at the end of 2025/26, affecting 117 schools.

Cheshire East Council: ceased its school catering service completely in April 2025.

Hampshire County Council: announced the closure of its in-house school catering service.

Twelve15, Surrey: contracts fell from 160 to 49. Survived only after Hertfordshire Catering Limited stepped in.

Warrington Borough Council: removing its £500,000 subsidy. 66 schools must find alternatives by September 2027.

If nothing changes

Contracts pass to a few very large providers.

Small and rural schools face higher prices or no service.

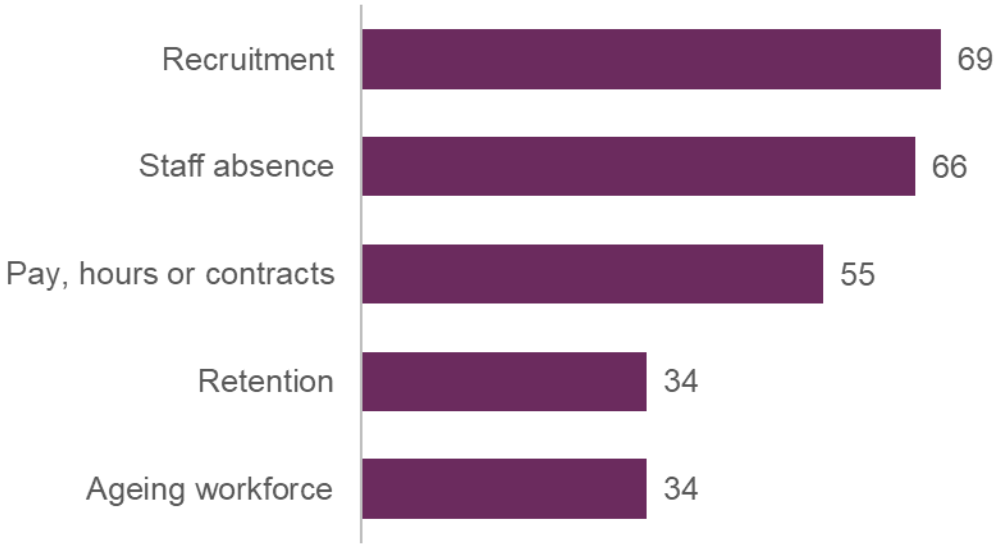
Councils lose kitchens, skilled teams and the know-how to step back in.

Source: A New Meal Deal, APSE and The School Food People, 2026

Recruitment and absence hit kitchens hardest

Biggest workforce concerns

% of respondents



25%

have no way of monitoring the School Food Standards

61% do, and 14% are not sure. The picture is a patchwork of in-house checks, council audits, contract management and menu reviews.

Source: A New Meal Deal, APSE and The School Food People, 2026

Suppliers feel the same squeeze

What customers raise with suppliers most

% of suppliers. An indicative snapshot, not a census



62.5%

expect the new School Food Standards to have a negative impact

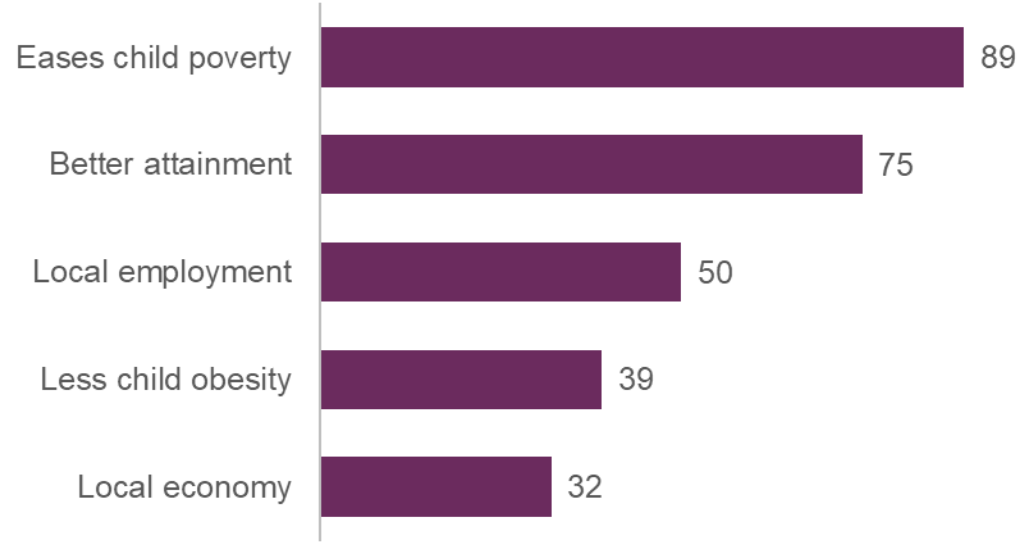
37.5% expect some negative impact and 25.0% a significant one. Only 18.8% expect some positive impact and 6.3% a significant one.

Source: A New Meal Deal, APSE and The School Food People, 2026

Procurement should count more than price

What respondents say school meals deliver

% of respondents



Why services withdraw

37% lost contracts or schools

33% could not compete on price

26% blame academy fragmentation

A public-interest test weighs provider failure and lost local capacity against a cheap headline bid.

Source: A New Meal Deal, APSE and The School Food People, 2026

What needs to change: funding, kitchens and choice

1

Fund the full cost of every meal

A transparent, independently reviewed formula covering food, fair pay, pensions, utilities, transport, compliance and kitchen overheads, uprated for inflation each year.

2

Renew school kitchens and equipment

Long-term capital funding to replace failing kitchens, add capacity for more free school meals and meet the revised School Food Standards.

3

Protect a diverse provider market

Procurement should test resilience, local value, workforce standards, nutrition and market concentration, not price alone. Contracts should be ones smaller providers can realistically bid for.

Source: A New Meal Deal, APSE and The School Food People, 2026

What needs to change: people, oversight and buying

4

Build and value the workforce

A sector workforce plan covering recruitment, training, progression, secure hours, fair pay and pensions, backed by funded implementation.

5

Strengthen accountability and a national voice

Consistent, resourced monitoring of the Standards, comparable data on funding, uptake, quality and provider concentration, and a cross-government strategy with ministerial ownership.

6

Apply a public-interest test when schools buy

Assess whole-life public value, including nutrition, workforce conditions, local benefit, provider resilience and market concentration, alongside price.

Source: A New Meal Deal, APSE and The School Food People, 2026

Over to you

A new meal deal must recognise school food as an investment in children, learning and resilient local communities, not a discretionary cost to be squeezed.

Funding

Does your service cover the full cost of a meal today, and who makes up the difference?

Workforce

How are recruitment and staff absence affecting your kitchens right now?

Buying

What would a public-interest test change the next time your contract is let?

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