

Estates, Facilities Management, and Corporate Services Market Intelligence Quarterly Report

July 2025



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Foreword

The first quarter of FY 2025/26 has seen the UK economy stabilise, with GDP growth softening to a modest 0.25%. While the cost-of-living crisis has eased slightly, operational budgets in Estates, Facilities Management (FM), and Corporate Services remain under pressure due to persistent inflation, rising labour costs, and an evolving regulatory landscape. These dynamics are driving procurement and supply chain leaders to respond with greater agility and strategic foresight.

Labour costs have increased significantly, in large part due to the National Insurance Contributions uplift introduced in April. This has directly impacted staffing-intensive FM contracts, triggering renewed supplier negotiations and contract reviews. At the same time, falling energy prices—driven by global market adjustments and stronger renewable output—have presented an opportunity for efficiency. Many organisations have capitalised on this window to renegotiate supply agreements or invest in energy efficiency initiatives that are already showing measurable benefits. However, market volatility remains a concern. Disruptions to global trade and fluctuating currency rates continue to affect the availability and cost of imported goods and specialist services. Procurement teams are responding by strengthening supply chain resilience, favouring multi-sourcing strategies, and embedding flexible contractual terms. These responses are particularly important in capital works and time-critical service delivery projects.

Regulatory developments in Q1 have generally supported operational simplification and growth. Key agencies such as the Financial Conduct Authority (FCA) have focused on reducing bureaucratic overheads, allowing organisations to redirect internal resources toward innovation and delivery. Within procurement, there has been a continued policy shift towards transparency and outcomes-based contracting, offering more room for innovation and service redesign in Estates and FM categories. This is accompanied by a growing emphasis on environmental, social, and governance (ESG) performance. NHS Net Zero goals, carbon reduction targets, and social value commitments are now routinely built into both tender evaluation and contract monitoring processes.

In practical terms, procurement functions across Estates, FM, and Corporate Services are reviewing contract structures in response to wage inflation, leveraging recent energy price reductions, and prioritising supply chain diversification. ESG factors now command a greater share of scoring criteria in tenders, while digital innovation – including automation and analytics – is being increasingly adopted to improve visibility, drive efficiency, and support evidence-based decision-making.

Looking ahead, procurement and supply chain leaders should focus on four key priorities: maintaining contractual and operational agility to respond to cost fluctuations; taking advantage of favourable market conditions, particularly in energy; embedding social value as a strategic driver in all sourcing activity; and investing in digital tools to improve transparency, compliance, and efficiency.

As Q1 concludes, the Estates and FM landscape continues to evolve amid a mix of financial pressures and policy opportunities. A well-informed, adaptive approach to procurement will be essential in navigating change, supporting NHS operational resilience, and delivering value across the public sector.

Nawaz Habib

Assistant Director for the Estates, Facilities Management and Corporate Services Category at NHS LPP

UK Businesses Economic Outlook

Headline Indicators summary (Source: [House of Commons Library – Economic Indicators](#))

GDP is estimated to have grown by 0.7% in February to April 2025 compared to the previous three-month period (November 2024 to January 2025). Eurozone GDP grew by 0.6% in January to March 2025.

Services output was up by 1.3% in February to April 2025 compared to the previous year. **Manufacturing output** was unchanged (+0.0%) over the same period.

Productivity across the whole UK economy increased by 0.2% in Q1 2025 compared with the previous quarter. Compared with the previous year, it was down by 0.2%.

CPI inflation was 3.4% in May 2025, down from 3.5% in April (although due to an error, the April figure should also have been 3.4%). Inflation in the Eurozone was 1.9% in May 2025, down from 2.2% in April.

The Bank of England's Monetary Policy Committee (MPC) **left interest rates unchanged at 4.25%** on 19 June. Rates have been cut by 1 percentage point overall since August 2024.

Average wages excluding bonuses were 5.2% higher in the three months to April 2025 compared with the year before, and 2.1% higher after adjusting for inflation. CPI inflation for this period was 3.0%.

34.01 million people were in **employment** in February to April 2025, up 670,000 from a year before. **The employment rate** was 75.1%, up from 74.4% the previous year. 1.60 million people were **unemployed** in February to April 2025, up 115,000 from the year before. **The unemployment rate** was 4.6%.

The **value of sterling** increased by 1.2% between April and May 2025, having fallen by 0.3% between March and April 2025. Compared with a year ago, it is 3.4% higher.

The volume of **retail sales** rose by 0.8% in the three months to May 2025 compared with the previous three months, and increased by 1.7% compared with the previous year.

The ONS (2025) reports that in late June 2025, more than a third (37%) of businesses with 10 or more employees reported they had some form of concern about their **supply chains** over the next 12 months, up 5 percentage points from late March; the most reported concern was international conflict at 19%, up 6 percentage points over the same period.

The ONS (2025) further reports that approximately one in five (21%) businesses reported that they are currently using some form of **artificial intelligence (AI) technology** in late June 2025, up 11 percentage points since the question was first introduced in late September 2023; for businesses with 250 employees or more, the proportion was higher at 36%.

Estates, Facilities Management & Corporate Services Economic Outlook

Energy – ONS Report

The System Average Price of gas increased by 5% in June 2025 compared with May 2025, to a monthly average price of 2.972 pence per kilowatt hour (p/kWh). This was also 5% higher than June 2024, which had a monthly average price of 2.818p/kWh.

The System Price of electricity was broadly unchanged at 6.958p/kWh in June 2025, compared with the previous month and was 1% lower than June 2024, which had a monthly average price of 6.913p/kWh.

These price increases are considered by the Office of Gas and Electricity Markets (Ofgem) when setting the energy price caps for the next three months. Large changes in these prices can indicate that the future price cap set by Ofgem will change.

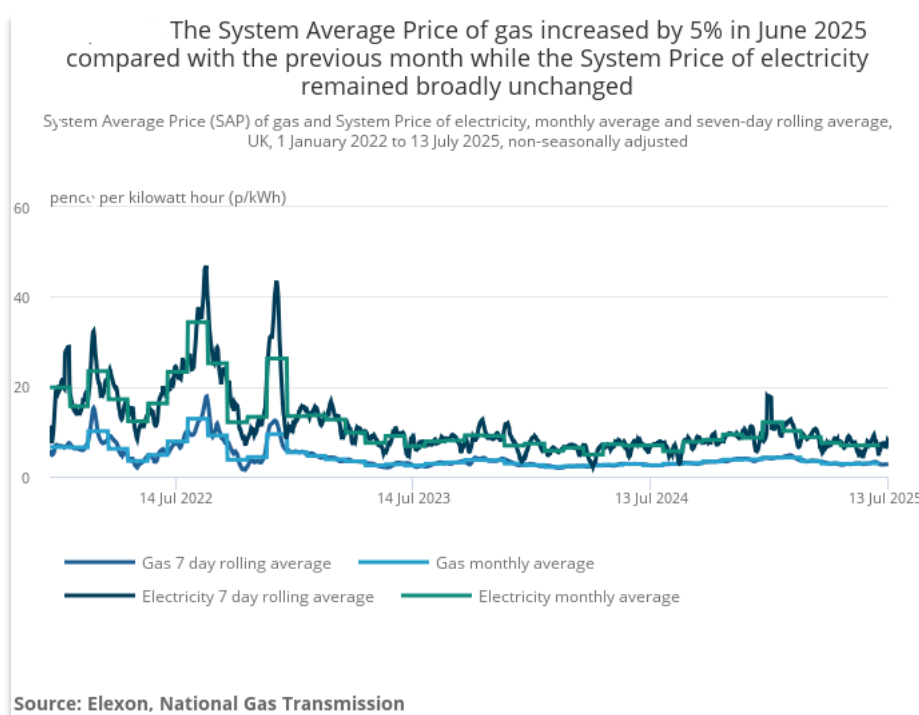


Fig 1. System Average Price of gas and System Price of electricity (Source: ONS, 2025)

Transport – ONS Report

Prices in the transport division rose overall by 1.7% in the 12 months to June 2025, up from 0.7% in the 12 months to May (Fig 2). On a monthly basis, prices rose by 0.7% in June 2025, compared with a fall of 0.2% a year ago.

The rise in the annual rate reflected a large upward effect from motor fuels. The average price of petrol fell by 0.5 pence per litre between May and June 2025, compared with a larger fall of 3.0 pence per litre between May and June 2024. The average price stood at 131.9 pence per litre in June 2025, down from 145.8 pence per litre a year earlier.

Similarly, diesel prices fell by 0.6 pence per litre in June 2025, compared with a fall of 4.8 pence per litre in June 2024. The average price stood at 138.5 pence per litre in June 2025, down from 151.5 pence per litre a year earlier. These movements resulted in overall motor fuel prices falling by 9.0% in the 12 months to June 2025, compared with a larger fall of 10.9% in the 12 months to May.

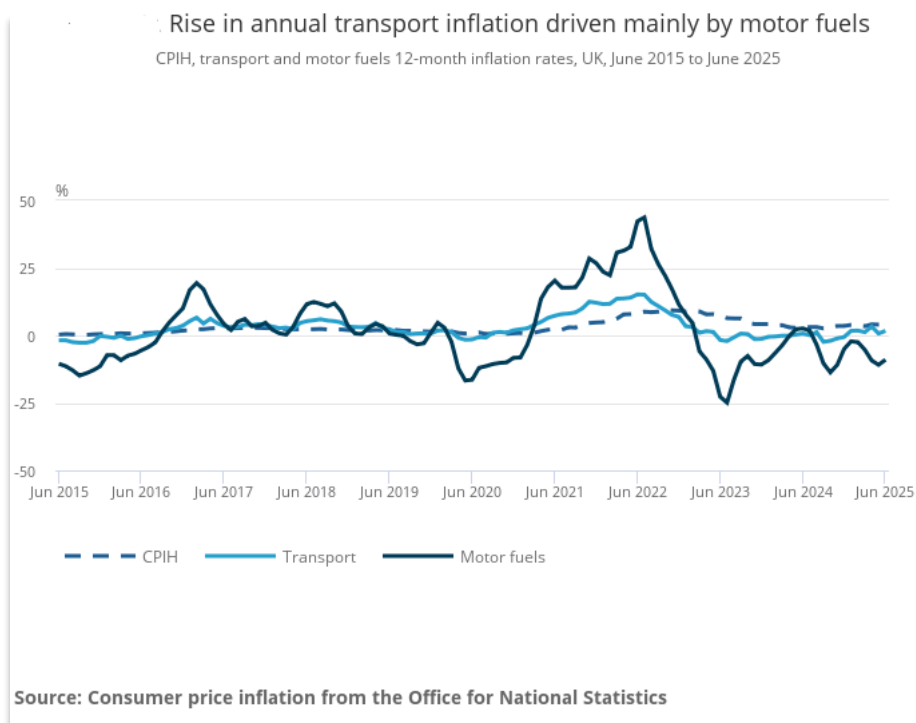


Fig 2. ONS UK Annual Inflation Rate Transport (Source: ONS, 2025)

Estates, Facilities Management, and Corporate Services Market Overview

Facilities Management Market Overview

The estates sector remains fundamentally stable with ongoing public sector infrastructure projects providing consistent workload amid broader economic softness. While construction output plateaued in early 2025, public infrastructure and healthcare estates continue to benefit from government-backed capital maintenance and estate transformation programmes. Inflationary pressures persist, driven by labour constraints, regulatory compliance costs, and energy price volatility. These factors are prompting estates managers to prioritise cost control, energy efficiency, and digital asset management solutions to optimise operational effectiveness and comply with sustainability objectives such as NHS Net Zero. Decision makers should focus on strategic asset condition monitoring and agile procurement of refurbishment and maintenance services to mitigate inflation risks while meeting evolving service requirements.

FM contracts face upward cost pressures primarily from rising labour costs related to increased National Insurance Contributions and living wage adjustments. However, easing energy prices in Q1 of the FY 2025 have offered temporary budget relief within utility-intensive FM service categories. Market capacity constraints in specialist trades and retrofit sectors are leading contractors to adopt cautious pricing strategies, focusing on risk management over volume. Procurement teams should pursue flexible contract models, foster supplier collaboration focused on innovation, and embed sustainability criteria linked to carbon reduction and social value commitments.

Research from Business Research Insights (2025) reports that the facilities management market size was valued at approximately GBP 31.19 billion in 2024 and is expected to reach GBP 63.2 billion by 2033, growing at a compound annual growth rate (CAGR) of about 9.2% from 2025 to 2033.



Operational efficiency and safety together with sustainability depend on the facilities management market across different industry sectors. The market expanded substantially because organisations require outsourced facility services and demand technological integration and they pursue sustainable initiatives. The service industry experiences a revolution through AI and IoT and automated technology which boosts operational proficiency while making possible predictive maintenances. Companies prioritize environment-friendly facility management solutions for two purposes: reducing carbon emissions and fulfilling environmental

regulations. Despite the current challenges of costly implementation and staffing issues, the market shows steady growth because organisations pursue intelligent sustainable facility management systems.

The facilities management market continues to accept IoT (Internet of Things) and AI (Artificial Intelligence) at a fast pace for managing buildings smartly. The market trend for automated facility management using AI continues to strengthen because businesses pursue both sustainability and cost efficiency goals. More sophisticated building technology implementations will transform both industrial operations and operational expenses and drive better occupant satisfaction through upcoming years.



(Source: Almalki, 2020)

Estates Facilities Management related NHS LPP frameworks

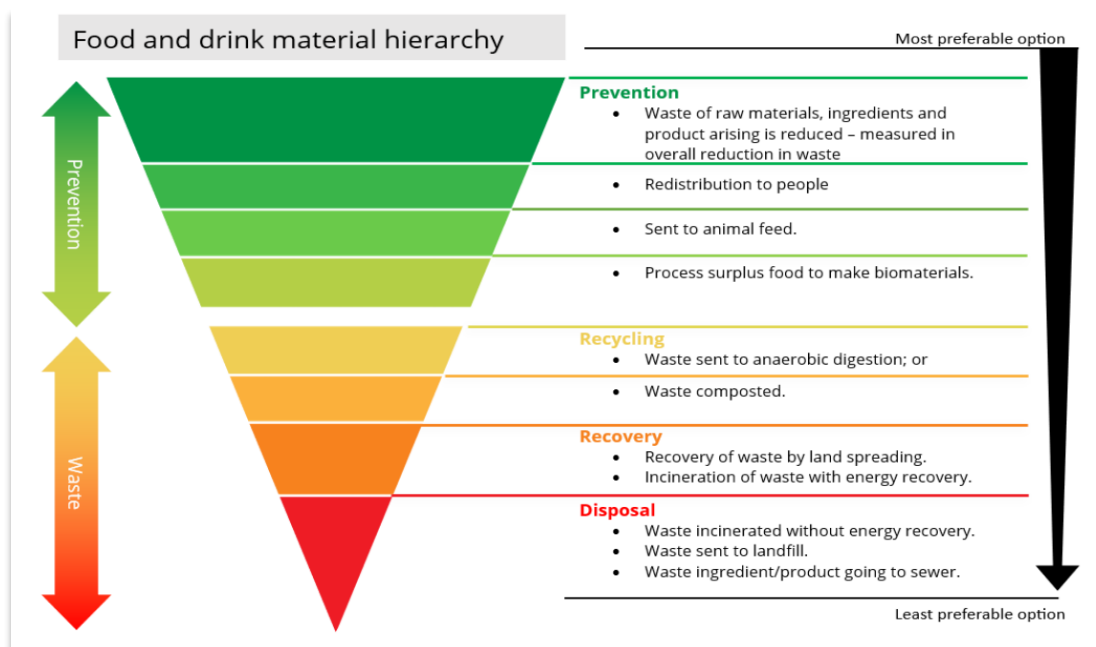
- Total Facilities Management Framework - <https://www.lpp.nhs.uk/categories/estates-facilities-corporate-services/total-facilities-management-framework/>
- Works and Maintenance Dynamic Purchasing System - <https://www.lpp.nhs.uk/categories/estates-facilities-corporate-services/works-and-maintenance-dynamic-purchasing-system/>

Waste Management Services Market Overview

Waste management continues to be a priority area amid increasing regulatory scrutiny and rising disposal costs. Public sector organisations are investing in circular economy initiatives and enhanced recycling services aligned with broader sustainability goals and legislative requirements. Procurement strategies are evolving to source specialist waste contractors with capabilities in hazardous, medical, and electronic waste handling, while also focusing on waste reduction and social value delivery. Market intelligence indicates consolidation trends among waste service providers, emphasizing innovation in waste-to-energy and improved reporting for compliance monitoring.

A recent report by The Waste and Resources Action Programme (WRAP) (2025) shows that in 2022, the UK threw away 24% less food (per capita) than in 2007. (This is the wasted food (excluding inedible parts). It compares the average amount thrown away per person, and focuses on food waste collected by local authorities, omitting food waste going down the sewer and home composted, due to challenges in tracking these latter disposal routes).

The amount of food 'saved' (i.e. not wasted in 2022 compared to 2007) would fill 1 Wembley stadium, 13 Royal Albert Halls, 5.4 million large wheelie bins (240 litres), 520 Olympic swimming pools or 140,000 bin lorries



Source: WRAP, 2025

Facts about household food waste levels in 2022 as reported by WRAP (2025)

- In total, including all disposal routes, (which includes sewer and home composting), UK households waste 6.0 million tonnes of food each year.
- Of the 6.0 million tonnes we throw away, almost three quarters (73% of the total) is food we could have eaten (4.4 million tonnes).
- Across all sectors in the UK, 10.2 million tonnes of food waste are generated, of which 58% (6.0 million tonnes) comes from the home.
- Food that could have been eaten but gets thrown away (4.4 million tonnes) is worth around £17 billion). On average, this is around £1,000 per year for a household of four people.
- The carbon associated with this food is equivalent to that generated by one in five cars on UK roads.
- On average, a person in the UK wastes food equivalent to 3 meals per week.

The UK Food and Drink Pact (UKFDP) target is to achieve a 50% reduction per person in total (i.e. food and inedible parts) UK food waste (post-farm gate) by 2030 compared to 2007. For the UK to halve food waste from a 2007 baseline, in line with the UKFDP target, total food waste from these sectors will need to be 71 kg per person per year in 2030 (i.e., half of the 142 kg per person per year in 2007). In 2021/22, there was 31 kg per person less food waste than in 2007, a reduction of around 22%. Therefore, a reduction of a further 40 kg per person is required to meet the target, or 28% of the 2007 baseline.

Table 1: Scenario showing an example of the food waste levels required in 2030 to meet the UKFDP target

Sector	Level of food waste required by 2030 (half 2007) (kg / person)	Change required from most recent year* to achieve reduction (kg / person)	Change required as a % of 2007 baseline
Household*	45.5	-25.3	-28%
Retail	2.5	-1.0	-20%
Manufacture	15.0	-5.6	-19%
Hospitality and Food Service Sector	7.5	-8.7	-58%
Total	70.5	-40.5	-28.6%

*Most recent year is 2022 for household food waste, 2021 for all other sectors. (Source: WRAP, 2025)

Guidance and resources on recycling and waste reduction for households and the Health and Social Care sector can be found on the WRAP website following this link: <https://www.wrap.ngo/resources>

Waste Services related NHS LPP frameworks

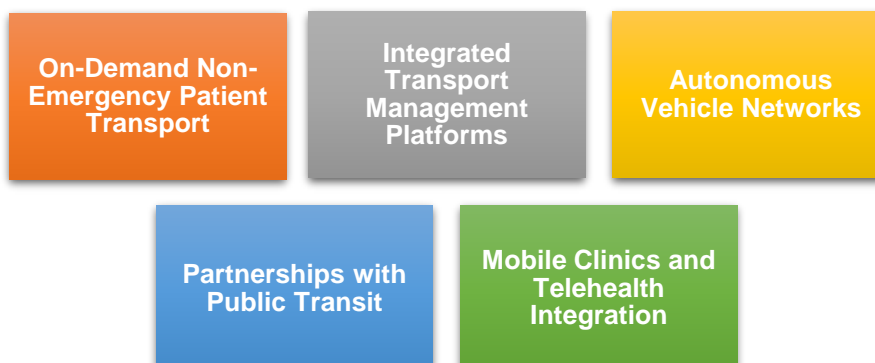
- Waste Management Services Dynamic Purchasing System - <https://www.lpp.nhs.uk/categories/estates-facilities-corporate-services/waste-management-services-dynamic-purchasing-system/>

Transport Services Market Overview

Transport services in the public sector remain influenced by regulatory changes and inflationary cost pressures, including fuel price fluctuations. A rising emphasis on low carbon and zero-emission vehicles aligns with national climate targets, particularly within NHS fleets and non-emergency patient transport. Demand for integrated transport solutions that improve patient access while optimising operational efficiency is growing. Strategic procurement should partner closely with suppliers to embed sustainable mobility solutions, leverage government funding for electrification, and explore data-driven transport planning tools to reduce costs and environmental impact.

In the evolving landscape of healthcare, the efficiency and effectiveness of patient transport have become pivotal. Innovative business models are emerging, driven by the need to reduce costs, improve care, and enhance patient experience. These models leverage technology and strategic partnerships to create seamless transport solutions that cater to a diverse range of patient needs (FasterCapital, 2025).

Business Models Shaping the Future of Patient Transport



(Source: FasterCapital, 2025)

- **On-Demand Non-Emergency Patient Transport (NEPTS)** - Companies like Uber Health are transforming patient transport by offering on-demand services. This model provides patients with flexibility and reduces wait times, ensuring timely appointments and better resource utilization for healthcare providers.
- **Integrated Transport Management Platforms** - These platforms coordinate multiple transport options, from ambulances to ride-sharing, under one system. They offer real-time tracking and scheduling, optimizing the transport process.
- **Autonomous Vehicle Networks** - The future of patient transport sees autonomous vehicles providing safe and consistent travel for patients. This reduces the reliance on human drivers and can be particularly beneficial for elderly and disabled patients.
- **Partnerships with Public Transit** - Collaborations with public transit systems can offer subsidized or dedicated services for patients, making use of existing infrastructure to improve accessibility.
- **Mobile Clinics and Telehealth Integration** - Mobile clinics extend the reach of healthcare services, and when combined with telehealth, they can bring expert care to remote or underserved areas

Transport Services related NHS LPP frameworks

- Non-Emergency Transport and Other Transport Services Dynamic Purchasing System - <https://www.lpp.nhs.uk/categories/estates-facilities-corporate-services/non-emergency-transport-and-other-transport-services-dynamic-purchasing-system/>

Corporate Services Market Overview

Corporate services procurement is increasingly focused on driving cost efficiency while supporting digital transformation and social value. Recruitment and workforce management spending remain elevated due to the talent shortage, pushing public bodies to enhance employer value propositions and invest in digital HR solutions. Supply chain complexity and inflationary pressures require robust contract management and supplier engagement strategies. Regulatory reforms are facilitating greater transparency and standardisation in procurement processes. Harnessing automation and AI to improve specification writing, tender management, and contract monitoring can enable procurement teams to shift from administrative to strategic functions, thereby increasing their contribution to organisational objectives.

The UK legal market is undergoing a fundamental shift driven by macroeconomic uncertainty and rapid advances in technology. In response to these pressures, corporate legal departments are turning their focus toward value and efficiency, pricing and billing innovation, and alternative resourcing models (Thomas Reuters, 2025).

Research by Thomson Reuters (2025) highlighted these key findings shaping the UK legal market:



AI and technology are reshaping resourcing strategies: Corporate legal teams are optimistic about AI's potential to simplify and streamline processes, prompting them to reassess how — and when — they allocate work to external partners. Law firms and alternative legal service providers (ALSPs) that embrace AI stand to gain a larger share of the spend of cost-conscious customers.

Productivity and value are top priorities: General Counsels are increasingly focused on

driving efficiency. As a result, law firms must deliver more than technical advice — they must begin to focus on offering solutions and support that deliver meaningful value to the customer rather than on billable hour inputs.

Customers seek pricing transparency and flexible structures: Customers are under ever-increasing budgetary pressures, putting a premium on cost certainty. Value-based pricing and alternative fee arrangements are gaining traction, especially in the UK. As budgets grow tighter, customers demand greater cost predictability and transparency. Slightly more than two-thirds (68%) of customers now prioritise value-based billing arrangements as a route to getting there. Compared with their US and global peers, UK-based customers are particularly vocal about moving away from hourly rates, with a greater openness to value-based billing models such as fixed fees, blended rates, or subscription-based pricing alternatives. This creates strategic opportunities for firms willing to embrace alternative pricing models tailored to customer preferences.

Corporate Services related NHS LPP frameworks

- Estates & Facilities Consultancy Services Dynamic Purchasing System - <https://www.lpp.nhs.uk/categories/estates-facilities-corporate-services/estates-facilities-consultancy-services-dynamic-purchasing-system/>

Sustainability – Estates, Facilities Management and Corporate Services

NHS 10-Year Plan

The NHS 10-year Health Plan was officially launched on July 2 2025. The plan emphasis care close to home, digital innovation and prevention-focused services.

Recommendations in relation to estates and facilities include:

- A 'no waste mandate' including the uptake of reusable products. Energy efficiency and better waste segregation and reporting along with annual progress reporting
- Evaluate impact of infection prevention and control on sustainable waste management
- Encouraging sterilisation and decontamination facilities
- Culture of sustainability across workforce

Whilst these are only recommendations, the move towards reusable products and the circular economy may mean less waste volume but more requirements for sterilising and decontamination as well as waste segregation across the NHS.

NHS Green Plans – 2025 Refresh

In February 2025, NHS England issued updated guidance requiring all NHS organisations to **refresh and resubmit their Green Plans** by **July 31, 2025**. These plans must be:

- Approved by the board
- Publicly accessible
- Aligned with the six focus areas outlined in the guidance

Six Key Focus Areas of this plan include: Workforce & leadership, Clinical transformation, Digital transformation, Medicines, Transport & travel, Estates & facilities. Further information on green plans can be found [here](#).

Procurement and Supply Chain – Estates Focus

NHS LPP is also supporting London's ICBs with the procurement and supply chain section of the Green plans, particularly Estates and facilities. The key recommended themes include:

- Improving energy efficiency in buildings
- Replacing fossil fuel heating with low-carbon alternatives
- Increasing on-site or nearby renewable energy generation

Estates, Facilities Management, and Corporate Services Market Intelligence Report

NHS London Procurement Partnership



Estate Implications

- Electrification, grid capacity, and clean energy are key themes for estate planning. Trusts are now expected to:
 - Develop Heat Decarbonisation Plans and;
 - Prepare business cases to support implementation

Guidance is available via [the Public Sector Decarbonisation Strategy – Energy Systems Catapult](#)

NHS LPP is available to provide support within these areas.

Overall Green Plan actions and timelines

- By July 31, 2025: Refreshed Green Plans must be approved and published
- Annual Reporting: Progress must be reported annually; plans should be accessible on public websites
- New Expectations: Detailed targets now include, for example, phasing out fossil-fuel heating systems by 2032

NHS LPP EFCS News

Updates regarding the Works and Maintenance Dynamic Purchasing System (DPS), formerly known as the Minor Works and Maintenance DPS.

What's Changed?

Extension of DPS

The DPS has been officially extended for another four years, now running until 23rd February 2029. This ensures continued access to a compliant route to market for a wide range of works and maintenance services.

Updated Name

The DPS title has changed from:

“Minor Works and Maintenance Dynamic Purchasing System”

to

“Works and Maintenance Dynamic Purchasing System”

The updated name clarifies that major and minor works are both in-scope of the agreement.

New service categories added

Six new categories have been added to broaden the scope of the DPS and better meet customer and market needs:

- Building Information Management (BIM)
- Car Parks
- Energy Assets
- Heat Networks
- Mechanical & Electrical
- Refurbishment

These additions reflect high-demand areas and strategic alignment with current and future Estates priorities.

[Estates, Facilities Management, and Corporate Services Market Intelligence Report](#)

NHS London Procurement Partnership



Atamis Reporting

Based on our records, below are the contracts for the respective London ICS that are coming up for renewal in the next 3-6 months

ICS	NHS LPP EFCS Area	Project Name	Contract End Date
NORTH EAST LONDON	Facilities Management	Security & Patrol Services	Oct-25
	Patient Transport Services	Call off Contract (Vehicle Hire Services)	Oct-25
NORTH WEST LONDON	Facilities Management	Clean Room Services	Jan-26
	Analysis and Recovery	Transactional Finance Service including Accounts Payable and Finance Business Systems and Support	Dec-25
SOUTH EAST LONDON	Facilities Management	Soft Facilities Management Procurement Support	Jan-26
	Facilities Management	Security Systems Maintenance	Jan-26
	Legal Services	Legal Services	Dec-25
	Estates Consultancy Services	Engineer consultancy services	Nov-25
	Audit Services	External Audit Services	Nov-25
	Payroll Services	Payroll & Pension Service Contract	Nov-25
	Estates Consultancy Services	Asbestos Management	Oct-25
	Patient Transport Services	Taxi Services and Courier	Oct-25

NHS LPP Contacts

Should you wish to discuss any of the highlighted NHS LPP agreements, please feel free to contact the respective Category teams below

NHS LPP Agreement	Contact
Analysis and Recovery Framework	sandra.baiden1@nhs.net
Estates & Facilities Consultancy Services Dynamic Purchasing System	risha.mehta@nhs.net / sandra.baiden1@nhs.net
Works and Maintenance Dynamic Purchasing System	ashwaq.fraser2@nhs.net/ remmy.kamya@nhs.net
Non-Emergency Transport and Other Transport Services Dynamic Purchasing System	ashwaq.fraser2@nhs.net/ remmy.kamya@nhs.net
Total Facilities Management Framework	j.rumsey@nhs.net / sandra.baiden1@nhs.net
Waste Management Services Dynamic Purchasing System	risha.mehta@nhs.net / remmy.kamya@nhs.net
Sustainability	simon.rowland7@nhs.net/ remi.banjo@nhs.net

Feedback

We would love to hear from you. If you have any suggestion on what you want to see in the next Quarterly report, please email: customer@lpp.nhs.uk

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