



2020 VISION

Fresh food trends
in hospitality and
foodservice

CHANGING TIMES, CHANGING TASTES

Stephen Oswald, chief executive officer, Bidfresh

However the economy is behaving, and whatever the strength, or otherwise, of consumer confidence, one thing is certain - hospitality businesses that don't continually adapt and evolve their menu to meet changes in consumer expectations, won't be around very long.

Operators will know what the headlines say. Younger customers in particular are looking for interesting plant-based and vegan menu options; they have concerns about the effect of global meat production on the climate and of the consequences of poor management of fish stocks. Huge amounts of food are wasted in wealthier parts of the world, while in other countries people struggle to subsist.

The network of local businesses within Bidfresh are all fresh food specialists, with many decades of experience between them. We work closely with chefs across the full range of hospitality businesses, meaning that we are not simply able to closely monitor trends, we are also in a position to offer

advice and support, to help them serve up dishes that genuinely meet consumer expectations.

At the heart of those expectations, operators must engage customers with the quality and variety of the food they offer. They must also address the wider concerns that increasingly shape consumer choices, which includes provenance, sustainability and ethically sourced products.

In this report, we cover the detailed product trends that we see across all our businesses, which provides insight into how chefs are approaching menus. Across meat, fish & seafood, fresh fruit & vegetables, cheese and dairy, familiar products and proven menu classics are working hand-in-hand with more innovative ideas to drive sales.

We're also spotlighting some of the broader initiatives taking place within Bidfresh, as we put sustainability and ethical trading at the heart of our business. By working together with chefs and operators, we can help to engage consumer with both the quality of the food they are enjoying, and the positive difference that it can make.

THE BUSINESS

Bidfresh (www.bidfresh.co.uk) supplies chefs with quality fresh produce, fish, meat and dairy products each day from 17 specialist businesses across the UK.

- Our national fish brand Direct Seafoods, is made up of 11 fishmongers;
- Our national meat brand, Countrywide Butchers, includes four premium butchery businesses;
- Our wholesale greengrocery business, Oliver Kay, has sites in Bolton, Wednesbury, London and Edinburgh;
- Rustic Cheese is a specialist cheese company in London, with Bidfresh also delivering dairy products through its other produce companies.

The company sources from the best possible suppliers locally, including from day boat fishermen, auctions, farms and cheesemongers, to internationally from European countries along with those further afield such as Iceland and Canada. The purchasing policy is to purchase directly from source where ever possible.

All company figures in this report are based on sales to Q3 2019.

2020: FOOD FOR THOUGHT

Growth may be slower and lower than in recent years, but MCA's Eating Out Report 2019 predicts the sector will grow by £5.5bn in the next three years.

- Reducing food waste, more sustainable produce sourcing and using more eco-friendly packaging, improving sustainability credentials will continue to be key for hospitality businesses.
- Consumers will continue to seek out healthier options, with lower sugar and fat, as well as products which help deliver a health benefit such as gut-friendly or immunity boosting.
- The demand for plant-based foods on menus will continue to grow, not just from vegans but from the growing number of flexitarians.
- How meat is produced is also coming in to sharper focus. Caterers who offer products with strong animal welfare credentials will be favoured by customers.

ETHICAL TRADING

- Bidfresh has been a member of the Ethical Trading Initiative (ETI) for its seafood business since 2015, and for the business overall from 2017.
- We are the ETI's only fresh seafood and meat supplier member.
- We joined the Food Network for Ethical Trade (FNET) in February 2019.
- Direct Seafoods continues to lead the way in seafood sustainability in the foodservice sector, offering one of the largest ranges of MSC certified products, with more than 130 lines.
- In association with Billingsgate Seafood School, six sustainable seafood courses for chefs are run each year.
- Support and advice on menu planning and recipes includes seasonal recipes as well as support for specific events such as Fish & Chip Day and Seafood Week. The focus is on using a broader range of underutilised species.
- Fish is prepared to customer specifications by our skilled depot teams, reducing waste and maximising the opportunity to use the full range of species available.
- Oliver Kay has launched 100% compostable solutions for 80% of its packaging to further reduce its impact on the environment.
- We use compostable trays made from sugar cane, and have also introduced 100% recyclable plastic bags to pack produce orders.
- Reusable plastic trays for meat deliveries and recyclable cardboard boxes for fish have been introduced.

MENU TRENDS FOR 2020

- Food with values
- Eco-friendly packaging
- Products with a story
- Health: reducing sugar and fat
- Plant-based dishes, including for take-away
- Meat/plant based blends
- Seagan dishes
- Healthy snacks
- No waste
- New Wave salads
- Street food influences remain

ALWAYS MORE TO DO:

- Countrywide Butchers has delisted all foie gras products.
- Bidfresh has introduced monthly environmental audits to reduce its consumption of resources, delivering a 6% reduction in water usage and a 6.4% reduction in electricity.
- Staff have been given re-useable drinks containers to eradicate the need for plastic water bottles.

TACKLING FOOD WASTE

- Significant investment in waste management systems at Oliver Kay has seen a screw press installed, which removes water from fruit and veg waste.
- This reduces the density of the load by 90%, leaving only organic waste behind which is turned back into bioenergy, or can be used as compost for farmers.
- The business has achieved zero waste to landfill at twelve sites, with the last two on track to achieve this goal by early 2020. At Oliver Kay, waste has been reduced to zero from 500 tonnes a year.



CREAM OF THE CROPS

DELIVERING 2019 SALES: FRUIT/VEG/SALAD BEST-SELLERS

- | | |
|-----------------------|-------------------------|
| 1. Cucumber | 6. Baby spinach |
| 2. Spring onions | 7. Lemons |
| 3. Bananas | 8. Raspberries |
| 4. Little Gem lettuce | 9. Mint |
| 5. Strawberries | 10. Tenderstem broccoli |

COOL IS THE CUCUMBER: cucumber remained Oliver Kay's best-selling product in 2018, increasing sales by 14%, thanks to its versatility across menus, from sandwiches and salads, to drink garnishes including gin, cocktails, water and Pimm's.

ASIAN FOOD INFLUENCE: spring onions also retained their popularity as a best-seller thanks to their use across a range of cuisine styles, including on-trend Asian food, as well as getting a big slice of the action in salads and fish dishes.

STILL GOING BANANAS: the all-year availability of bananas, low price, and broad consumer appeal has helped make this tropical fruit caterers biggest fruit buy. Its sales climbed by 29% in the past year, with organic sales also showing strong growth. Its pole position in hospitality is also being driven by on-trend juices and smoothies and as an accompaniment to dishes, such as porridge, in the growing breakfast market, along with use in vegan-friendly baking.

GEM MEATS DEMAND: the continuing success of burgers on menus has helped drive sales of essential accompaniment Little Gem lettuce, and this looks set to continue in 2020.

TIP Use Little Gem leaves as a carrier for fillings for canapés or feature on vegan-friendly sharing boards.

LEMONS' AID: With G&T still very much the thing, lemons continue to take a slice of the action and deliver buoyant sales.

TIP Dehydrate leftover lemon slices and use as garnish on dishes and cocktails.

PATCH WORK: BEST-SELLING VEG 2019

- | | |
|------------------------|---------------------|
| 1. Baby spinach | 6. Carrots |
| 2. Tenderstem broccoli | 7. Flat mushrooms |
| 3. Red onions | 8. Courgettes |
| 4. Cauliflower | 9. Butternut squash |
| 5. Onions | 10. White cabbage |

HEY BABY!: the growing consumer trend for foods which help support good health, and its multi-menu uses, has helped baby spinach remain a sales star, delivering a whopping 51% growth in 2019. This green god is extremely versatile, with sales benefiting from use in vegan/vegetarian dishes, including brunch options, smoothies, wraps, salads and as a side dish.

LOVE ME TENDER(STEM): sales of sweet, crunchy, premium brassica brand Tenderstem broccoli are benefitting from its ability to pair well with almost anything. Sales of the broccoli-Chinese kale cross continue to climb, with caterers attracted to its multiple menu uses including in main course salads and as a striking side.

FLOWER POWER REMAINS: cauliflower, a menu hero of recent years, continues to be a best-selling brassica, with growth in cauliflower cheese being served with roasts, as well as dishes such as vegan cauliflower steaks and carb-alternatives cauliflower rice and couscous, helping it remain in favour.

TIP Use cauliflower in hash browns, and make kimchi with the stalks

SLAW CLAWS SALES: success of slaw as an accompaniment to dishes such as burgers has helped white cabbage remain in the top 10.

SALAD DAYS: BEST-SELLERS 2019

- | | |
|------------------------|-------------------------|
| 1. Cucumber | 6. Celery |
| 2. Spring onions | 7. Cos lettuce |
| 3. Little Gem lettuce | 8. Watercress |
| 4. Iceberg lettuce | 9. Red peppers |
| 5. Red cherry tomatoes | 10. Pre-cooked beetroot |

SALAD STAPLES: as consumers continue to seek healthier options on menus, sales of core salad items such as cucumber, lettuce and tomatoes remain stable. Lettuce continues to be a sales leader due to its use not only on the plate, but also in a bun.

GUT FEEL FOR FURTHER CELERY SALES: celery's continued use on cheese boards, in salads and with the continuing rise of brunch sales - with Bloody Marys, has helped celery sales continue to sing, and with sales of gut-friendly celery juice on the rise this looks set to continue into 2020.

RED PEPPER ROCKETING: red pepper sales rocketed in 2019 due to its increased use in vegan dishes, hummus and Asian inspired food, as well as continuing strong use in Mediterranean inspired cuisine.

EATS, SHOOTS & PEAS: fast-growing pea shoots have been a go-to garnish for many chefs and mixologists in recent years, which has seen its rise to sales glory, and its popularity isn't going anywhere fast.

FRUITY NUMBERS: BEST-SELLERS 2019

- | | |
|----------------|------------------|
| 1. Bananas | 2. Strawberries |
| 3. Lemons | 4. Raspberries |
| 5. Pineapples | 6. Oranges |
| 7. Limes | 8. Black grapes |
| 9. Blueberries | 10. Green grapes |

STRAWBERRY YIELDS: a great crop and longer season for British strawberries in the past year, helped deliver a good price for caterers, helping ensure strawberries remain a big feature on both food and drink menus, with sales up 30% in the past year. Its position as a perfect garnish to pink gin, whose sales continue to boom, and in pimping up prosecco, has also helped its sales success.

PINEAPPLE SALES SPIKE: last year pineapple toppled avocado as the UK's fastest growing fruit, and sales continue to grow, with Oliver Kay seeing a 27% sales increase in the past year, driven by its versatility across main dishes, desserts and juices.

TIP Pineapple and on-trend rum make a winning partnership for desserts.

TOP OF THE POTS: BEST-SELLING HERBS 2019

- | | | | |
|-----------|--------------|-----------|-----------------|
| 1. Mint | 2. Coriander | 3. Basil | 4. Flat parsley |
| 5. Chives | 6. Rosemary | 7. Ginger | 8. Thyme |

MIGHTY MINT: the march of mojito sales in recent years has helped mint become top of the herb pots, becoming a year-round bar essential for one of the UK's best-selling cocktails. Sales success has also been achieved through growing sales of fresh mint tea, its essential place in summer drink stalwart Pimm's and its wide-spread use as a food ingredient and garnish.

BASIL TEARING IT UP: Italian food is the world's favourite cuisine, the growth of artisan pizzas, topped with fresh herbs like basil, and its widespread use in other Italian dishes, as well as increasing use in savoury cocktails, has given it staying power.

GLOBAL GAINS: the rise in popularity in the UK of more Asian, Mexican and Latin dishes has given coriander sales a further kick.

GINGER SALES NINJA: the health and wellness properties of ginger, which makes it a popular ingredient in on-trend kombuchas, and the increasing demand for cuisines such as West African dishes, which are ginger friendly, is pushing demand.

WHAT'S HOT FOR 2020

VEGAN MARCHES ON: the majority of Oliver Kay's fastest growing products in the past year tap into the increasing need by chefs to cater for vegans/flexitarians, with products including vegan bacon jam, silken tofu, vegan potato slider buns, vegan seitan pepperoni and chicken plant-based salt and pepper pieces in the highest climbers.

PLANT-BASED POWERING UP: plant-based dishes will continue to grow on menus, with caterers increasingly looking for meat alternatives beyond seitan, and suppliers like Oliver Kay, continuing to deliver ready-to-rock products and menu ideas to help caterers to meet this need.

MEAT-LIKE VEG: products such as tinned jackfruit, mushroom varieties such as puff balls and Chanterelle, and aubergine will continue to be in demand.

JAPANESE FOOD: the 2020 Tokyo Olympics will drive further demand for Japanese inspired dishes, with sales of ingredients such as Tatsoi, Asian pears and lotus roots set to increase.

SUSTAINABILITY: Rubies in the Rubble tomato ketchup was a great performer for Oliver Kay in 2019, with customers attracted to its strong food waste reduction message. Caterers need to look carefully at what vegetable and fruit peelings and stalks are going in their bins which could be used to create something else.

SEXY SUNSHINE SALADS: using ingredients which bring sunshine to the plate, such as funky coloured veg like radishes, candied beetroot and purple cauliflower and vibrant fruit such as melon and dragon fruit, as well as ancient grains and ferments.

HEALTH CHECK: dialling up the health benefits of specific fruit and veg in your dish marketing, such as immunity boosting oranges, brain-powering blueberries or gut-friendly greens.

GROWING YOUR FOLLOWING: Insta-worthy veg and salads.

LOCAL HEROES: tap in to the localism trend by highlighting British fruit and vegetable growers in dish descriptions.

MAD FOR MELON: newer varieties such as the red-flesh Charentais and orange flesh Amarillo are keeping the category exciting and helping it grow.

KALETTES: this sprout and broccoli hybrid is helping keep things fresh for kale fans, along with colourful kales such as red or black Cavolo Nero.

SEA GREENS: such as sea purslane, sea fennel, sea aster, samphire and seaweed.

HOSPITALITY HEROES: TOP OF THE STOCKS 2019

TOP END RESTAURANTS

1. Jumbo asparagus
2. Premium chipping potatoes
3. Spinach
4. Heirloom tomatoes
5. Button mushrooms

FISH RESTAURANTS

1. Fine beans
2. Tenderstem broccoli
3. Red chillies
4. Red peppers
5. Green peppers

MID-MARKET PUB GROUPS

1. Cucumbers
2. Lemons
3. Mint
4. Limes
5. Strawberries



NETTING SALES

FLYING FISH: 2019 BEST-SELLERS

- | | |
|------------------|------------|
| 1. Smoked salmon | 4. Haddock |
| 2. Salmon | 5. Cod |
| 3. King prawns | |

SALES SMOKIN': Smoked salmon was caterers' favourite fish in 2019, with hotels, contract caterers and restaurants its biggest buyers. It continues to be utilised as a popular starter, sandwich and 'seacuterie' ingredient. Its popularity is also being driven by on-trend dishes such as Japanese sashimi and Nordic inspired gravadlax. Use at breakfast, the fastest growing daypart across the hospitality industry, has also boosted sales.

FARMED SALMON FOCUS: Salmon remains a favourite ingredient for main course dishes. But with wild Atlantic salmon having an MCS 'to avoid' rating, caterers are keen to utilise more sustainable alternatives such as certified farmed salmon and trout.



Use salmon trimmings/leftovers to make fishcakes and burgers, and skin to make fish crisps.

TOP TRENDS 2019/20

SUSTAINABILITY GAINS: sales of sustainable fish products through Direct Seafoods increased by 18% as caterers respond to increasing consumer awareness and demand for options which are kinder to the environment, and this looks set to increase further for 2020.

PUBS PUSHING GROWTH: one of the biggest growth areas in fish and seafood sales in 2019 was from the gastropub sector.

STORY TIME: strong sales growth of fish products which can tell a story, as caterers try to gain margin on menus from interesting products with strong provenance.

SUSTAINABLE SEA BASS: sales of chef favourite wild sea bass have decreased due to restrictions on the fishing of wild-caught fish along with increased awareness of how unsustainable this fish is. Eco-aware chefs are, therefore, migrating to sustainable farmed sea bass. This is great to eat and competitively priced.

SIZE MATTERS: there is an increasing demand for strict portion sizes on a variety of species including cod, salmon, haddock and halibut as caterers, who are increasingly under-pressure on costs, seek to keep the species on their menus at a competitive price. This also enables uniformity of offering to keep customers happy.

WHITE SPECIES CHANGES: continuing decline in frozen cod and haddock sales where value customers are moving towards other white fish species like frozen pollock, capensis hake and pangasius. These species can be used in popular dishes such as fish fingers, goujons, and fish cakes, as well as served in batter or breadcrumbs as an alternative in the menu classic fish and chips.

SALES SWIMMERS: TOP 10 FASTEST GROWING PRODUCTS

- | | |
|-------------------------------|--------------------|
| 1. Meagre | 6. Monkfish |
| 2. Farmed halibut | 7. Mussels |
| 3. Farmed turbot | 8. Haddock |
| 4. Frozen lobster | 9. Farmed sea bass |
| 5. Frozen coated fish fillets | 10. Dover sole |

MEAGRE SALES: sales of meagre, a fish farmed in the Mediterranean, grew by 60% with fine dining restaurants, mid-market restaurants, and gastropubs driving its growth, as more chefs discover how versatile and cost-effective this species is. Sometimes referred to as "stone bass" this fast growing large fish has helped to fill the void left by the more unsustainable wild sea bass.

Grill, pan-fry or serve raw as ceviche.



HALIBUT HERO: With wild caught halibut a real no-no on menus due to its endangered status, farmed halibut sales are on the rise.



With its meaty texture, halibut works well in seagan dishes.

MORE SUSTAINABLE MONKFISH: sales of monkfish, which is perceived as a luxury item, have been on the march with increasing demand from quality pubs and hotels due to its recently improved sustainability rating. Its versatility as a firm meaty fish has made it a great menu option.

Monk-fish works well with on-trend West African flavours.



PUBS SHOWING SOME MUSSELS: strong sales growth has been driven by mid-market restaurants and gastropubs who are embracing the good GP potential of mussels.



Serve mussels with rose harissa, chorizo and white wine and lime broth.

SOLE TRADERS EMBRACING SIMPLICITY: the mild, sweet flavour of Dover Sole means it is a fish chefs need to do little to, which helps drive its position as a popular classic on restaurant menus. It remains hugely popular as a seasonal special or 'catch of the day' menu offering, with customers confident about the flavour and showing their support for fish caught in British waters.

CATCHING ON: WHAT'S HOT FOR 2020

SEAGANISM: the number of consumers embracing a largely plant-based diet combined with eating some sustainable seafood is set to rise, prompting demand for more small plate, good value seafood recipe ideas.

FISH BURGERS: burgers remain one of UK consumers favourite foods, and with some retailers now having their own fish burger range, there are also more opportunities for burger-style seafood menus in the hospitality sector.

SEAFOOD SKEWERS: quality kebabs are in demand by customers, including skewers celebrating the fruits of the sea. This is also an opportunity for chefs to use a broader range of species by making mixed seafood kebabs.

FROZEN PRODUCTS WITH SUSTAINABLE CREDENTIALS: sales of frozen lines which have certification such as MSC, BAP, ASC and Global Gap accreditations will continue to grow as caterers look for more affordable menu options but with retained confidence.

RESPONSIBLY SOURCED TROUT: ChalkStream trout produced in Hampshire has caught top chefs' imagination as a home-grown alternative to salmon, with its beautiful colour, top quality firm meat and all the health-benefits of salmon. It is rekindling British consumers' taste for a great fish that had fallen out of favour over the last decade. Its smoked trout is ideal for helping tap in to the trend for 'seacuterie' on menus.

YELLOWTAIL KINGFISH (HIRAMASSA): produced in an amazing high-tech recirculation system in the Netherlands these fish are one of the cornerstones of Japanese food culture, used in sashimi in particular, but also incredibly versatile for other cooking methods and styles including modern Asian cuisine.

GLITNE HALIBUT: this sustainably sourced farmed halibut from Norway is being appreciated by chefs for its firm snow-white flesh that is perfect for all styles of cooking.

FROZEN CANADIAN LOBSTER MEAT: chefs in fine dining restaurants are embracing its raw meat in dishes due to reduced labour in preparation, but with no detriment to quality.

GILL-TO-FIN DISHES GROWING: as well as focusing on serving sustainable species, another trend which looks set to increase further in 2020 is chefs using as much of the fish as they can, rather than just prime cuts. A rising number of UK chefs are utilising fish bones, heads - including cheeks and collars - and offal, to create delicious dishes. This approach is helping to reduce food waste and excite more adventurous diners. Fish collar, the fatty, tender meat tucked between the fish's gills and the rest of its body is among the star performers of this growing trend. The collar is great for grilling or for using in dishes such as terrines. It can also be battered and fried to make delicious fish bites. Offal, including livers and hearts, is popping up in fish pates, while bones are being used to make broths. Fish scraps make for fillings for still on-trend tacos.

SEACUTERIE CATCHING ON: The gill-to-fin trend is also helping drive the 'seacuterie' trend, which sees chefs preserving fish and seafood through pickling, fermenting, smoking or ageing. Ageing fish helps to intensify the flavour and improve its texture, with meaty types of fish best for aging. Seacuterie items now being featured on menus include shellfish sausages, crab dips and smoked mussels. This fishy snack trend, which can be served to customers as a charcuterie-style sharing board, looks set to become more widespread on menus.

WHAT'S HOT?



CUTS ABOVE

MEATING DEMAND: BEST-SELLERS 2019

1. Beef feather blade
2. Chicken fillets
3. Rib-eye steaks
4. Lamb rump
5. Rump steaks

TOP 10 PRODUCTS OVERALL

1. Beef steaks
2. Chicken fillets
3. Beef burgers
4. Sausages
5. Bacon
6. Beef mince
7. Pork belly
8. Pork loin ribs
9. Roasting beef
10. Lamb shoulder

BLADE RUNNER: slow-cooking star feather blade of beef has been a cut above other meat products in the past year, with sales of this shoulder cut driven by chefs in these ever-competitive trading times, looking for more cost-effective cuts which can help deliver them a good gross profit.

VALUE FOCUS: there has been a significant change in the past 12 months to Countrywide Butchers' best-sellers list with a significant drop in demand for high value cuts such as fillet of beef, which have been slowly changing to more value cuts from differing parts of the animal such as the forequarter, where the blade is from, and hindquarter. Beef daube is another cut rising up the ranks, particularly with event and banqueting chefs.

BREAST IS BEST: with poultry accounting for nearly half the meat we eat in the UK it is no surprise that chicken breast remains in the best-sellers, widely used in main course dishes and snacks across the catering industry, including continuing to rule the roost at chicken-centric casual dining operators.

RUMP ON THE RISE: lamb rump continues to increase its popularity with caterers as a cheaper cut, full of flavour which also offers great versatility in how it can be prepared. It is increasingly being used roasted in a la carte main course dishes, for BBQing or for Sunday roasts, with lamb now the nation's third most popular roast meat.

QUALITY DRIVE: rump steak's place among the best-sellers is testament to the trend for consumers eating less but eating better quality meat, with premium cuts still in demand by customers still looking for a meat 'treat' when dining out.

HIGH FLYERS: BEST-SELLING POULTRY 2019

1. Chicken fillets
2. Chicken thighs
3. Diced chicken
4. Cornfed chicken supreme
5. Chicken legs

TRENDS PARTNER: with increasing consumer demand for healthier options on menus, chicken breast sales have been given a boost from the increasing focus on main course salads and mini chicken fillets with dips as a popular food-to-go snack option, which looks set to continue in 2020. The growth in popularity of Caribbean dishes like jerk chicken and Mexican food and dishes such as chicken burritos and tacos is also helping sustain sales. With Millennial parents demanding healthier dishes and more global influenced food for their children, chicken fillet is also predicted to step up its usage further in catering for younger diners.

THIGH HIGH SALES: the growth in popularity of Asian food, which favours the thigh in many dishes, has helped boost chicken thigh's popularity with chefs, including in on-trend Japanese inspired katsu curries. Sales are also being driven as a popular ingredient in dishes such as chicken burgers, buttermilk fried chicken (along with chicken legs) and chicken strips.



Use katsu chicken in a wrap or in a katsu chicken rainbow salad for tasty lunch options.



STEAKS ARE HIGH: 2019 BEST-SELLERS

1. Rib-Eye
2. Flat Iron
3. Fillet
4. Rump
5. Feather blade

CUTTING EDGE: sales of the Rib-Eye remain buoyant, with consumers continuing to be attracted to this juicy, tender and flavourful steak, although some caterers are reducing portion size to remain competitive on this premium cost product. The best-selling steak sizes are: Ribeye 284g, Sirloin & Rump 227g, Fillet 200g.

STRONG AS IRON: lean steak cut the Flat Iron, made famous in the US, has been a big hit in the casual dining sector with caterers attracted to the more economical price point and great flavour of this steak.

FEATHER IN ITS CAP: The success of the feather blade steak proves this cut isn't just for braising. A popular steak cut for barbecuing, it has grown in popularity with caterers in recent years due to its lower price, great sweet flavour and use by high-profile chefs like Tom Kerridge.

GAME ON: BEST-SELLING GAME 2019

1. Red leg partridge
2. Pheasant
3. Venison
4. Grouse
5. Quail

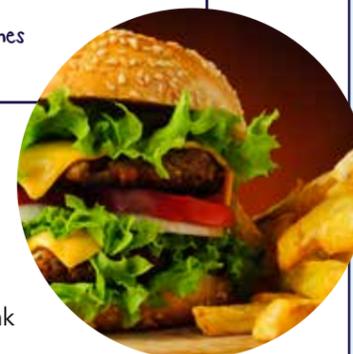
SHOOTING STAR: sales of partridge are flying with chefs attracted to this delicate, tender and easy to cook bird which is an ideal introduction to game dishes for customers who don't want a too 'gamey' flavour. Its availability throughout much of the game season also helps secure its top spot.

WILD THING: venison has become virtually mainstream on menus, utilised in everything from burgers, pies and steaks, to Scotch eggs and street food dishes, with customers attracted to this healthier lean meat and with more hospitality venues featuring more of it on menus 2020 looks set to be another strong year.



Use game in gourmet snack dishes such as sausage rolls.

BURGER BONANZA: 2019 BEST- SELLERS



1. Chuck and flank
2. Angus
3. Bespoke recipes for specific customers - examples include:

- Chuck, Brisket and Bavette Burger
- Chuck and Pure Beef Fat with Salt and Pepper
- Aberdeen Angus Chuck and Rib Cap Burger

SIZE MATTERS: Countrywide Butchers' Henson's business now sells an average two million burgers a year, a 30% increase in the last two years. The most popular burger size remains 170g.

With burgers still a hero dish of many menus, the strong growth in bespoke burgers is being driven by caterers increasingly looking for bespoke recipes to create a signature product which makes customers want to return. Beef is still king of the burger with very small demand for alternatives. Many operators offer a chicken burger, but most are made from whole muscle cuts and not minced like the traditional beef burger.



WHAT'S HOT FOR 2020

QUALITY IS KING: the number of vegans and flexitarians continues to grow and although meat still has a major role to play on menus and will continue to be consumed by the majority of people in the UK, when they do eat meat consumers are looking for better quality options.

WELFARE FOCUS: There is a need to keep meat quality/animal welfare assurances in the spotlight, as some operators that previously had a UK-only meat policy are now allowing more EU products, particularly chicken and pork. Countrywide Butchers has worked with RSPCA to advise on its new 'Five Freedoms' Animal Welfare policy and will continue to focus on welfare in its sourcing.

MEAT PLANT BLENDS: burgers still made with meat but less of it, such as blending beef with plant-based foods like fresh mushrooms.

MEAT FEAST: meatzas, with dough pizza bases replaced with meat, and skewered food such as kebabs, are on the increase.

PRE-PREPARED PRODUCTS: with skill and space shortages in kitchens, there is an increasing move towards prepared products for chefs, such as filled turkey products for Christmas.

PORK CUTS: pork remains a key ingredient on menus with slow-cooking and GP boosting cuts like belly and shoulder set to be popular with chefs as pork prices increase due to global demand.

MORE OFFAL ACTION: with sustainability a key trend, including nose to tail eating, expect offal to become even more prominent on top restaurant menus.

THE BIG CHEESES

DONS OF DAIRY: BEST-SELLING CHEESES 2019

- | | |
|-----------------|-------------------|
| 1. Halloumi | 4. Mature Cheddar |
| 2. Mozzarella | 5. Goat's Cheese |
| 3. Mild Cheddar | 6. Grana Padano |

TOP TRENDS 2019/20

ALL HAIL HALLOUMI: this robust, salty cheese has retained its best-seller crown in 2019, accounting for nearly a quarter (21%) of Rustic Cheese sales. The continuing popularity of the Cypriot cheese is fuelled by the increase in vegetarian diets and the rise in popularity of Greek and Middle Eastern food. The UK is now the second biggest consumers of halloumi, eating 43% of overall exports. Nando's helped to kick-start hospitality operators' love-in with halloumi by introducing halloumi fries to the market. It is now used on menus across the foodservice industry and is in particularly high demand from fast food restaurant operators, to cater for consumers looking for non-meat proteins.



Use in brunch dishes like fritters or a 'Veggie Full English.' or for on-trend skewered food.

VICTORY WITH VEGAN: 2019 was the year of Vegan 'cheese', with Rustic Cheese sales of vegan products up a whopping 52% and set to increase further in 2020. The UK is the world leader in vegan food so it is unsurprising that the number of vegan 'cheese' launches rocketed in the past year with sales following suit, with particularly high sales in pubs and burger chains. Chefs and caterers are using vegan versions of 'cheese' like Cheddar and mozzarella to create vegan-friendly versions of classic dishes including pizzas, burgers and sandwiches and in other vegan fast-food options. The growth of vegan mozzarella, the second biggest seller, is being driven by its increasing use in casual dining pizza restaurants, independent Italian restaurants and the food-to-go market, including street food operators.

FAB FOUR: BEST-SELLING CONTINENTAL CHEESES

- | | |
|---------------|--------------|
| 1. Halloumi | 3. Camembert |
| 2. Mozzarella | 4. Emmental |

MAGNIFICENT SEVEN: BEST-SELLING 2019 VEGAN 'CHEESES'

- | | |
|-----------------------|------------------------|
| 1. Tofu | 5. Vegan 'Cheddar' |
| 2. Vegan mozzarella | 6. Vegan parmesan |
| 3. Vegan smoked gouda | 7. Vegan blue 'cheese' |
| 4. Smoked tofu | |

BEST OF BRITISH

The localism trend continues to grow in the UK foodservice market, with hospitality operators increasingly keen to feature British/regional cheeses to tap in to consumer demand for supporting local producers. British cheese is outselling continental, and with caterers increasingly looking for a local 'story' behind a product to help drive margin, it is no surprise that a Cheddar produced by the oldest English maker of Cheddar, Barbers 1833 Vintage Reserve, was the British cheese star performer of 2019. Its sales have also been boosted by the trend for vintage cheeses with stronger flavour profiles. Among other Brits continuing to pack a sales punch in the past year were Applewood smoked cheese, Snowdonia Black Bomber and Tunworth British Camembert. Britain is now making some of the best cheeses in the world, and growth is being driven by consumers willing to pay a premium for a quality, artisan product, but to drive sales further in 2020 hospitality operators need to continue to focus on educating customers as to 'why the premium price?'

GETTING THEIR GOAT: Goat's cheese was a stellar performer in 2019, driven by a change in food habits and increase in food allergies. Goat's cheese is rich in calcium, fatty acids and contains lower cholesterol compared to cow's milk, so further growth is predicted. Best-selling goat's cheeses included Driftwood, Ravens Oak goat's brie and Rosary. Strong growth is coming from independent restaurants and pubs who are embracing its versatility for cooking and cheese boards.



Feature a blue goat's cheese on cheeseboards for a more distinct offering.

WHAT'S HOT FOR 2020



- Halloumi will remain a hero product.
- Growth in variety of producers and styles of vegan cheeses. More artisan cheeses will continue to appear, with growth of vegan 'cheeseboards' in top end outlets.
- Cheeses made from different animal milks, such as sheep and goat.
- Growth of different blue cheese styles, including blue goat's cheese and brie.
- Melted cheese.
- Snacking cheese.

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