

Food Trends Report | 2023





Fresh food trends in hospitality and foodservice

Even in a downturn, consumers have high expectations when eating out. They want a broad range of choice, they demand healthy as well as indulgent options, they want to see provenance, sustainability and seasonality highlighted on menus, and they want the all-important 'wow' factor that reassures them they've made the right choice when committing their discretionary spend.

Chefs and hospitality businesses have to juggle all these expectations in a market where inflation challenges not only their food budget, but every aspect of the business. High quality fresh produce, prepared and supplied by experts remains at the heart of menu planning, and more than ever; having the best ingredients to keep consumers engaged and interested is essential.

The three specialist businesses within the Bidfresh group supply tens of thousands of hospitality businesses across the full breadth of the industry, including Michelin Starred restaurants, mainstream and branded restaurants, pubs and bars, hotels, education, healthcare, leisure and public sector catering. These three well-established suppliers are:

Campbell Brothers: www.campbellbrothers.co.uk Serving the best quality meat to chefs throughout Britain, prepared by skilled butchers.

Direct Seafoods: www.directseafoods.co.uk Supplying fresh and frozen fish and seafood from a network of regional depots staffed by skilled fishmongers, named MSC Fresh Fish Foodservice Supplier of the Year in 2021 and 2022,

Oliver Kay: www.oliverkayproduce.co.uk Fresh food suppliers, sourcing quality fresh ingredients including fruit and vegetables, from UK and global producers, as well as dairy and dry store ingredients.

Every day, the specialists in each business work closely with chefs, managers and menu planners to prepare food to their specifications. The top selling products by volume across the businesses are featured in this Trends Report. Combining the insight of experienced greengrocers, fishmongers and butchers in each business and at each site, the report sets out to demonstrate the many ways in which hospitality is responding to the challenges of one of the most difficult trading environments most operators have experienced.

Key trends

- **Nose to tail:** Across all sectors of the hospitality industry, chefs are working harder than ever to use every part possible of the produce they buy, reducing food waste and boosting sustainability as well as making the most of budgets.
- Managing costs: Not only is spending under pressure, but with the labour shortage continuing, chefs are working closely with specialist suppliers to make the most of their skills in preparing products.
- Sustainability: Despite pressure on eating-out budgets, consumers still want to know that the food they order is sourced sustainably, and chefs are also increasingly committed to protecting food resources.
- British food: There is more focus than ever on the challenges and opportunities facing British food producers, and consumers look for opportunities to support British farmers and growers.
- **Wow factor:** Consumers want meals that feature produce, flavours and styles that go beyond what they prepare at home
- Social media friendly: An important part of the wow factor is ensuring that dishes look fabulous enough to star on social media.
- Takeaway and delivery: As consumers embrace flexibility, sometimes choosing to order restaurant-quality food to eat at home, menus increasingly feature dishes adapted to takeaway and delivery options.

All tables in the Bidfresh Trends Report 2023 are based on volumes supplied unless otherwise stated. In some cases, different sizes or cuts of otherwise similar products have been combined.



Fish & Seafood

ish and seafood offer a significant opportunity for chefs and hospitality businesses to appeal to customers. At a time when cash-strapped consumers are concerned about their own spending power, as well as the wider economy, fish dishes offer a touch of that all-important 'wow' factor, with ideas and flavours that consumers are less likely to cook for themselves at home.

Fish and seafood is also often seen as a healthier menu choice when eating out, an area consumers are increasingly conscious of, especially with calorie labelling now being widely included on menus.



Chef support

- Direct Seafoods works closely with chefs and hospitality operators from right across the sector. Our broad customer base within foodservice makes a significant positive contribution to the range and choice of sustainable seafood available to customers. We produce many bespoke cuts, fillets and added value products, to help give menus a point of difference.
- An industry-leading skills training programme helps ensure that our fishmongers are confident to work with the full range of fresh fish and seafood species processed through our regional depots.
- We promote the use of the broadest range of sustainable species, maximising yield, significantly reducing waste and working closely with customers, providing practical support and advice to enable foodservice businesses to serve as diverse a range of fish and seafood as possible.

Top Products

The best-selling fish & seafood products 2022

- Haddock
 - Hake
- Sauid

- King Prawns
- Mussels
 - ChalkStream® Trout
 - Frozen Battered Cod
- Smoked SalmonCod

- The overall top fish and seafood lines sold by Direct Seafoods reflects the increasing diversity of the market. Alongside established favourites such as cod, haddock, salmon and prawns, chefs are increasingly using alternative white fish species such as hake and pollock.
- Products such as squid, mussels and sea bass have increasingly become 'regulars' on restaurant, casual dining and gastropub menus, driven both by their popularity with chefs, and strong appeal to consumers.
- The best sellers feature a range of fillets, which chefs increasingly serve in a variety of ways. As well as battering white fillets in the kitchen to add a bespoke feel to fish and chips, fillets can be simply shallow fried or grilled, and served with home-made sauces and fresh, seasonal vegetables to create appealing, healthier dishes for menus and 'catch of the day' specials boards.
- Mussels, prawns, and squid are also versatile ingredients that appear in a wide range of dishes across the hospitality sector.
- Salt and pepper squid is a popular starter, while moulesfrites can double up as a starter or main according to portion size. King prawns, supplied frozen and ready to sizzle on the grill, make an impressive addition to a steak in a surf and turf dish, or served spiced with noodles or rice in Asian-influenced dishes.

Fastest growing products

The fastest growing fish & seafood product lines in 2022

- Mussels
- Haddock
- ChalkStream® Trout
- Pollock
- MSC Cod
- Smoked Salmon
- Battered Cod



- The increasing diversity of fish and seafood on menus is seen in the growth of frozen pollock fillets as a white fish alternative, while sustainably farmed ChalkStream® Trout is a wonderful alternative to salmon, used by chefs both smoked and fresh. in a variety of dishes.
- The growth of premium MSC certified cod products reflects the willingness of chefs in all sectors of the market, including high-end restaurants, to embrace sustainability concerns.
- In a tight labour market, operators are finding using preprepared products such as battered cod, saves both time and costs.



Top selling fish products

Haddock | Salmon | Hake | ChalkStream® Trout | Cod

Despite a number of concerns about farmed salmon, demand remains strong. Direct Seafoods sources salmon with a range of origins, including Loch Duart RSPCAA accredited whole salmon, which meets chefs' demands for a premium product with the reassurance of proper accreditation to maintain welfare standards.

Top selling seafood products

Mussels | Scallops | Prawns | Clams | Squid

The versatility of shellfish such as mussels and scallops, puts them in strong demand from chefs, this is reflected in the range of ways in which scallops, as one example, are supplied. Chefs can order whole scallops on the shell, with roe on, roeless and in a range of pack sizes and formats, allowing scallops to be served in a broad range of dishes and at different price points.

Top selling added value fish & seafood products

Battered Cod | Fish Cakes | Salt & Pepper Squid Battered Pollock | Battered Goujons | Breaded Cod Battered Haddock | Breaded Fish Fingers

- With hospitality operators in all sectors dealing with the ongoing labour shortage, added value products are increasingly in demand. Battered fillets can improve portion control and help reduce food waste. Fish cakes and salt and pepper squid are versatile options as starters, mains and in sharing platters. Fish cakes and goujons also allow use of offcuts, reducing food waste and supporting sustainability initiatives.
- With an increasing focus on nutrition, breaded goujons and fish fingers allow education caterers and those providing children's menus, to cost-effectively offer fish as a healthy option on menus.

Top Five Growth Predictions

• King Prawns. These have been one of the more stable seafood lines over the last couple of years. Whilst not totally immune from inflation and higher processing costs, they have not been subject to increases of the severity seen on some other lines. King Prawns remain hugely popular, and are incredibly versatile. Chefs can serve them whole and grilled, in a variety of Mediterranean dishes, in fish pies, in surf and turf combos, skewered, curried or tempura battered. This means prawns can feature in a range of dishes on any menu and are a low labour option.

Prawns are supplied frozen, ensuring zero wastage and long shelf life. The increasing levels of sustainability accreditation on farmed prawns helps to make them a responsible choice. At a time when budgets are tight, prawns offer chefs menu versatility, and are always popular with customers.

• Fish & chips. Although the whole sector faces challenges, managed pubs have been reasonably robust in recent

years, and Direct Seafoods works with a number of pub operators to provide fish fillets for fish & chips, prepared to the customer's requirements, People may think twice about fine dining, but a trip to the pub for a fish & chip lunch remains popular. This has been demonstrated in strong cod and haddock sales to pubs in 2022, which looks set to continue in 2023.

- Mussels: Mussels are one of the most sustainable seafood lines hospitality operators can buy, and are cultivated all around the UK, meeting provenance expectations. Mussels are also good value, and so a great option for cash-strapped consumers looking for something they wouldn't cook at home. They are also incredibly versatile, either presented in a starring role in Moules-Frites, as part of a seafood linguine, or even as a garnish for other fish specials.
- Salmon: Salmon is perennially popular, although Direct Seafoods has also had success converting some customers to alternatives such as locally sourced ChalkStream® trout. As more salmon farms work towards Aquaculture Stewardship Council accreditation, concerns relating to pollution, social responsibility, sustainability of fish feed, biodiversity and diseases are being addressed. This will both maintain and grow the popularity of salmon.
- Fish pies and fish cakes: These are menu staples in hospitality and catering businesses throughout the UK. The ability to create popular dishes in the kitchen using cheaper offcuts from portioned fish enables chefs to offer an economically sound choice, whilst utilising the principles of head-to-tail eating and minimal food wastage. Direct Seafoods also works with a UK specialist, producing bespoke fish cakes to customer specification. This is a way to reduce labour costs in the kitchen, whilst retaining quality, and using a unique recipe to create a point of difference on the menu.

*Direct Seafoods prepares and supplies a number of products, including haddock fillets, to the bespoke requirements of a range of hospitality operators. Figures in some tables include combined volumes for a range of bespoke products as well as general sales.

Direct Seafoods offers one of the largest ranges of MSC certified seafood of any foodservice supplier. The business was named MSC UK Fresh Fish Foodservice Supplier of the Year 2022 and FWD Green Wholesaler of the Year 2022.







Campbell Meat & Poultry

eat and poultry remain at the heart of menus, even if those menus are more diverse. CGA analysis shows that in the aftermath of COVID, UK restaurants have put the focus on established favourites, with burgers, steaks, roast dinners and chicken dishes all amongst the popular dishes taking a significant share of menu sales.

Costs and Opportunities

- Increased costs of meat and poultry have been driven by a broad range of factors. The impact of Brexit in terms of increased costs and bureaucracy of importing food was compounded by the war in Ukraine, which affected supply chains and caused grain shortages, increasing animal feed
- Properties of the contract of past year from catering businesses for British farmed and produced products. This reflects an increase in consumers who say they are actively looking for British produce on menus, in order to support local businesses, farmers and the food sector.
- This trend for sourcing closer to home means fewer food miles, which supports carbon reduction and sustainability initiatives.
- Interest in a broader range of cuts and better value dishes have also helped drive Campbell Brothers 'nose-to-tail' approach, which aims to make maximum use of each animal.

Changing Demand

Meat and poultry product areas that have seen significant movement over the past year show the steps chefs are taking to adapt menus, manage costs and offer customers the best value in response to the economic challenges.

- Chicken sales have generally increased 18% by volume as operators look to create dishes using a lower priced protein. Chicken is a versatile product that can be used in a range of dishes such as pasta, salads and risottos, while chicken wings served with sauces and dips are widely offered as snacks, starters and sharers.
- **Pork** cuts have increased 10% by volume. While pork prices have increased, it remains one of the best value proteins. Pork belly and collar have been the main drivers of growth, offering enough versatility to feature on roast, barbecue, and grill menus, as well as in stews, pies, casseroles and a range of Asian dishes.
- Lamb volumes are static overall, as it remains generally an expensive menu option. However, demand for minced and diced lamb has grown as chefs look for better-value ways to keep lamb on the menu. Its popularity in African and

Mediterranean dishes also offers chefs a range of ways to get minced and diced lamb on menus.

Gourmet sausages and burgers have risen 25% in volume sales. Campbell Brothers' on-site production of these products, means they are available in a wide range of varieties and flavours, and can be produced to an individual customer's specifications, adding a point of difference to menus, while making use of better value cuts. Breakfast offers, and the growth of takeaway and delivery, has also driven demand for the British banger.

Beef

- Beef forequarter and hindquarter cuts increased 20% by volume. These better value cuts are ideal for slow cooking, creating dishes such as stews, pies and casseroles which have strong customer appeal and generate higher margins at a reasonable price point on menus.
- The appeal of better value beef cuts has come to an extent at the expense of prime steak cuts, which have seen a 5% decline in volume sales. The higher cost of prime steaks makes it difficult for some mainstream operators to maintain GP while still offering steak at a menu price point that won't deter customers.
- However, very premium steak has defied this trend. Campbell Brothers 'CB Reserve Beef' steak range, featuring Himalayan salt dry aged beef, has been the fastest growing product by volume over the last year. This has been driven by the return to trading of flagship, highend restaurants, many of which took an understandably cautious approach to reopening post-pandemic.
- Despite pressure on consumer spend, there are customers ready to treat themselves to a premium meal on the right occasion, even if that means going out

Top Products

- Flat Iron Beef Steaks
- Feather blade beef steaks Rib Eye Steaks
- Steak Beef burgers
- Beef daubes
- Diced Beef Topside of Beef
- Silverside of Beef
- Minced Beef Fillet Steaks

- Sirloin Steaks
- Diced Pork
- Pork Loin Steaks
- Minced Pork
- Pork Belly
- Chicken Thigh Meat
- Chicken Fillets

Lamb - minced and diced

Beef is a specialty of Campbell Brothers, and its popularity, despite rising costs, is seen in the top sellers.

However, operators are increasingly looking for better value options, with flat iron and feather blade steaks more in demand for mainstream menus than more premium sirloin and rib eye.

Across the board, from beef daubes to chicken thigh meat, and minced and diced pork and lamb, demand for better value cuts is high as chefs look to maintain customer appeal while managing pressure on budgets.

Top 10 fastest growing meat products

The fastest growing products for Campbell Brothers, based on 2022 sales growth compared to 2021

Campbell Brothers CB Reserve Beef steak range, using.. ...Himalayan salt dry aged beef | Flat Iron Steak | Steak Burger range | Beef Steak Mince | Diced Beef | Pork Belly Chicken Thighs | Chicken Fillets | Sausage range Pork Belly

• The fastest growing products show that the market is very

Top 10 poultry

The best-selling poultry products in 2022

Chicken Fillets | Chicken Thigh Meat | Chicken wing Chicken leg | Chicken drumstick | Chicken supreme Whole chicken | Turkey Breast | Turkey escalope Turkey rolled thigh

- Despite higher prices driven by the avian flu outbreak in 2022, chicken remains a good value protein, and is also seen as a healthier option by many consumers. Its versatility gives chefs the option to use chicken in a broad range of main
- Although turkey sales are seasonal to a considerable extent,

Top 10 - the others

Lorne sausage | Black Pudding | Haggis | Duck Breast Cooked Meats | Diced Chicken Breast | Pork Loins Beef Striploins | Beef Brisket | Beef Stroganoff

- As menu choices expand and operators look to increase trading times, as well as make the most of the popularity of takeaway and delivery menus, demand for a broader range of meat and poultry products grows.
- The popularity of Lorne sausage and haggis reflects Campbell Brothers' strength in the Scottish market, while

demand for cooked meats shows the growth of deli-style

• Like Lorne sausage, black pudding is in demand for breakfast menus.

Top 10 added value

The best-selling added value products in 2022

Pork Breakfast Sausage | Pork & Herb Sausages Cumberland Sausages | Pork & Leek Sausages Cumberland Sausage Rings | Black Puddings | Haggis Steak burgers | Pork & Chorizo Burgers Venison Burgers

• Campbell Brothers sausage range was one of the fastest growing products of 2022, reflecting demand from chefs for better value products that still maintain strong customer

Top meat product predictions for 2023

Dry-aged Beef Steak Cuts - Fillet, Rib eye, Sirloin Flat Iron Steaks | Feather Blade Steaks | Pork Belly Chicken (all cuts)

- With inflation forecast to remain a challenge for both for slow cooking, such as pork belly, are expected to see sales increase further.
- Steak is the first choice for many consumers as a 'treat' when eating out, even if they are able to go out less often. fillets, rib eyes, and sirloins at the top end of the market, from mainstream and casual dining operators.
- As well as offering good value, chicken is popular as a healthier choice. This will drive demand right across the sector, and particularly from educational caterers





OLIVER KAY Fresh Produce

resh produce may once have cynically been dismissed as the Cinderella of hospitality menus, served on the side or as an afterthought to the main ingredient in a dish. However, with an increasing number of consumers actively seeking out plant based food choices, both for lifestyle and sustainability reasons, the growing profile of fresh produce has seen it become a star player in its own right in an increasing number of dishes.

This trend has been boosted by the spotlight that chefs such as Ottolenghi and Gaz Oakley have put on using fresh produce in dishes. The demographics are definitely moving in the right direction for Oliver Kay and the many artisan suppliers of fresh and seasonal vegetables, fruit and herbs that the specialist hospitality greengrocer works with.

The specialist skills of Oliver Kay's greengrocers support chefs across the hospitality sector as they face the challenge of taking their menus beyond the traditional simple piece of protein into new areas.

Consumer trends analyst Mintel reports that interest in plant-based diets has driven a wave of innovation in plant-Enjoying plant-based foods is now a lifestyle choice, rather than just a fad. While some embrace vegan diets, the flexitarian consumer is of far more relevance to chefs and operators when planning menus, as customers focus on consuming more plants and reducing, rather than eliminating, their intake of animal ingredients.

Even consumers who don't automatically identify with the plant-based movement are, in many cases, looking for healthier choices when eating out, but also expect chefs to add some wow factor to meals at a time when domestic budgets are tight. Showing that fresh produce can be indulgent as well as healthy is an increasingly important factor in menu planning.

- Reducing waste: At a time when inflation is still rising and consumer spend is under pressure, chefs have to make every penny they spend work hard, Despite not having a nose or tail, fresh fruit and veg plays an essential part in the overall nose-to-tail, no waste approach that sets out to maximise the benefits of hospitality budgets, as well as to reduce food waste and drive sustainability efforts. Using broccoli stems for home-made slaw, roasting cauliflower leaves, and using carrot tops in pesto are just a few of the ways that chefs can make more of their buying power.
- Seasonality: Seasonality has strong appeal to customers who want to enjoy locally produced food at its best, and working with the seasons is key when it comes to fresh



produce. As well as keeping chefs up to date with the latest seasonal information, Oliver Kay provides support and inspiration, including details of produce in season, new products, recipe suggestions, food trends information and industry news.

- Added value: Extra side dishes made with seasonal produce allow customers to tailor their meal to their own tastes, adding a healthy choice such as spring greens or a more indulgent side such as potatoes dauphinoise, according to their mood and the occasion. Upselling side dishes offers additional customer choice as well as increasing revenue for operators.
- based meat and dairy alternatives in the UK and Europe.

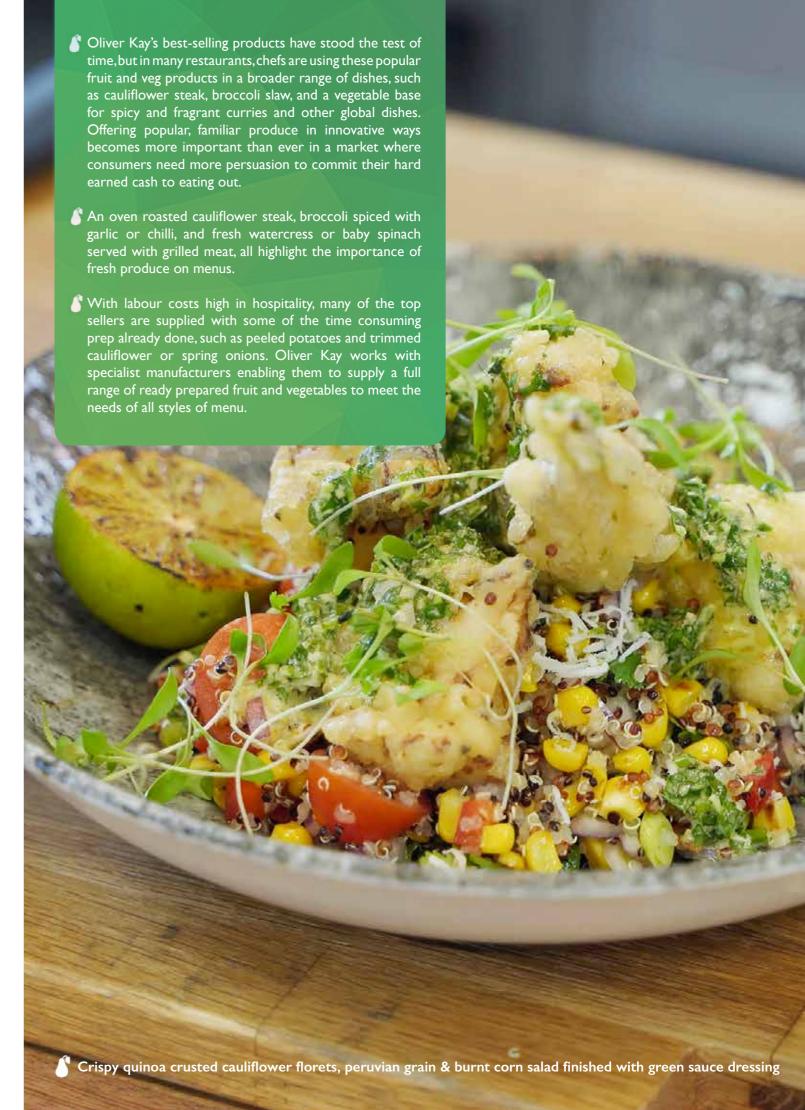
 Specialist producers: Consumers increasingly want to show their support for small and local food producers, while chefs and hospitality operators appreciate the point of difference that can be delivered by spotlighting growers on menus. Oliver Kay's established relationships with growers and suppliers from the UK and all over the world offers a wide and innovative product range delivered directly to the customer, as well as enabling chefs to offer produce customers won't find anywhere else.

Top Products

Top best selling products

- Tenderstem Broccoli
- Cucumber
- Little Gem
- Baby Spinach
- Watercress
- Mint
- Spring Onion
- Banana
- Basil

- Onion
- Cherry Tomato
- Coriander
- Iceberg Lettuce
- Cauliflower
- Pineapple
- Potato
- Parsley
- Strawberry



Top selling fruit

Banana | Pineapple | Strawberry | Raspberry | Avocado Orange | Lemon | Red Grape | Easy Peeler | Honeydew Melon

- Fresh fruit is in demand right across menus, from a melon and prosciutto starter to berries in a summer pudding, while a wedge of lemon is equally at home served with a pan-fried plaice or in a freshly poured gin & tonic.
- Despite global demand having pushed up prices over recent years, the growth of brunch style menus as well as Tex-Mex cuisine help make avocados a popular menu item – despite some sections of the media believing that younger consumers' spend on smashed avocado on toast would be better directed elsewhere.

Top selling herbs

Mint | Basil | Coriander | Parsley | Chive | Red Chilli Rosemary | Thyme | Sage

- The popularity of fresh mint in part reflects the dominance of the mojito on cocktail menus, although the gin boom of recent years sees bars increasingly look to fresh herbs to complement the botanicals in speciality gins, with basil, sage and rosemary among the herbs carving out a second career as a cocktail ingredient.
- UK consumers' palates have gradually become more used to spicy food over time, with popularity of peri-peri cooking and similar cuisines prompting chefs to use fresh red chilies in a broad range of dishes.

Top selling veg

Tenderstem Broccoli | Baby Spinach | Cooking Onion Cauliflower | Butternut Squash | Carrot | Broccoli White Cabbage | Asparagus

- Fresh coleslaw is an essential side dish in the casual dining sector, with white cabbage providing the canvas on which chefs can create their own masterpiece by adding a range of ingredients.
- While the British asparagus season is relatively short, its popularity as a starter, simply grilled with butter, or wrapped in charcuterie, makes it a top seller.
- Chefs seeking out plant based ingredient dishes robust enough to meet consumer expectations of a substantial meal, has boosted demand for butternut squash. The fleshy texture takes on other flavours well and can be used to make spicy dishes in the style of a range of international cuisines.

Top selling salad

Cucumber | Little Gem | Watercress | Spring Onion Cherry Tomato | Iceberg Lettuce | Rocket | Celery

- As consumers look for healthier choices, a deli-style salad bar featuring a choice of fresh salad items which can be simply served in a takeaway bowl, or added to sandwiches and wraps can add a much-needed extra revenue stream for hospitality businesses.
- Rocket is in strong demand, used as a simple way to add some much needed greenery to steak and grill dishes, as well as to spice up salads.

Top product predictions for 2023

- Cauliflower: The chunky nature of a cauliflower, as well as its ability to carry a wide range of flavours, makes it a popular choice as the main player in vegetarian and vegan dishes. Cauliflower steaks are increasingly seen on menus, and as a home-grown, good value vegetable that can take on the flavours of herbs, spices and sauce, cauliflower is expected to be a firm favourite with chefs in the year ahead.
- Herbs: Flavour is key to adding the wow factor that cashstrapped customers expect when deciding to eat out, and fresh herbs, available year round from specialist growers, offer chefs a cost effective way to add flavour to a broad range of dishes. This also helps to increase flavour where less salt is used, for example by using lemon and herbs to lift a dish during cooking rather than the traditional seasoning. Traditional dishes such as roast pork, lamb and chicken can be spiced up with sage and mint, while a fragrant herb such as coriander can be used to bring an international dimension to a broad range of dishes.
- Seasonal fruit: As consumers look for healthier menu options when they eat out, demand for fresh, seasonal fruit is growing. Highlights of the UK growing season include strawberries at the start of the summer, followed by raspberries and blackcurrants and moving on to the autumn harvest including apples, pears and plums. Spotlighting seasonal fruit in menu favourites such as crumbles and pies, or simply as part of a fresh fruit salad served with natural yoghurt, helps drive dessert appeal.
- Tomatoes: Tomatoes are moving from the side plate to centre stage, with increasing interest in the flavours delivered by using a broader range of varieties as growers offer wider choice, such as heritage tomatoes.

At the same time, the continuing popularity of burger menus, Mediterranean dishes, Italian food and growing consumer expectations that menus will include interesting and varied salad choices, will keep tomatoes in demand.

• Broccoli: Despite having been a mainstay of the veg offer for many years, chefs are starting to realise that they may only have been scratching the surface when it comes the versatility of broccoli on menus.

The texture of broccoli means it can be roasted with herbs and spices to create a plant-based main course that feels substantial, while for consumers looking for healthier choices, broccoli's high vitamin and mineral content also adds to its appeal.



