

Health & Vitality Foodservice Trends 2016

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Dear Health Agenda Enthusiast,

As Footprint's head of research and analysis, it gives me enormous pleasure to present you with the 2016 Health & Vitality Foodservice Trends Report supported by Bidvest Foodservice's Plate2Planet.co.uk.

Footprint has championed the health debate as part of its social sustainability pillar and this report throws up how far we have come, what channels have been pushing the boundaries and what areas need far more attention. The research undertaken has also distilled what have to be the most important areas for attention. In view of what now appears to be a defunct Public Health Responsibility Deal, the industry can in no way rest on its laurels now that the metaphoric big wooden stick of legislation appears to have faded into the landscape.

Industry needs to drive issues of nutrition, sustainable meals, sugar, salt, education and policy more than ever before. The responsibility we have is more palpable than ever. What is clear from this report is that the foodservice and hospitality sector, in parts, is indeed responsible and pioneering. But the stand-out initiatives unfortunately highlight those areas that still have an awful lot to do.

In the spring, we will be launching the Footprint Sustainability Index supported by Plate2Planet.co.uk, powered by Bidvest Foodservice. The index will be the industry's first ever benchmark; mapping where we have come from, where we need to get to and clearly identifying the movers, the shakers but also the laggards. Effectively this will be the industry's first ever meaningful sustainability benchmark. The Health & Vitality Foodservice Trends report serves as the preface of this and we hope you enjoy the insight, thought leadership and direction.

We hope you enjoy reading it as much as we have creating it.

Amy Fetzer
head of research & analysis - Footprint



Dear Reader,

Last year Bidvest Foodservice, in collaboration with many businesses represented here tonight, launched a brand new industry sustainability initiative - plate2planet. Our objective was simple; to create a single best practice resource to support every sector in the hospitality industry - a sustainability one stop shop if you will. Since its launch it has been embraced with an enthusiasm that truly evidences the commitment of our industry to strive for better standards.

In this spirit of joint effort, we are taking our forward thinking approach to sustainability another step by partnering with Footprint on the publication of the Industry's first ever Sustainability Index to be launched in the spring. For the first time ever a genuine benchmark will exist to support us all in our understanding of where we have come from, what we have achieved and where we need to get to. The result will be a roadmap against which we can measure our ongoing progress as a single industry.

As a preview to the Index, we are delighted to launch the Footprint Health & Vitality Foodservice Trends Report supported by Bidvest Foodservice and plate2planet.co.uk. As the Sustainability Index will address all angles of responsible business relevant to our sector, this report focuses the health and wellbeing pillar of the ongoing sustainability journey.

In front of you, you will see a leaflet with a QR code or www.plate2planet.co.uk/health-vitality-report. Please scan this with your phone to download the report where you will find key perspectives to take back to your own businesses. One thing is for sure; I believe the health and wellbeing debate is not going away and we hope this report will make it easier for you to remain ahead of the curve.

We are delighted to be supporting the Health & Vitality Honours and we really hope you enjoy the insight the report affords.

Shirley Duncalf
head of people & sustainability - Bidvest Foodservice

Health & Vitality Foodservice Trends 2016

Who's doing what, why, and what needs to happen next: an analysis of the key trends in health and wellbeing in foodservice.

Health and wellbeing has been a hot topic in foodservice over the last year, with topics like obesity and sugar rarely out of the headlines and the debate about how to make the nation healthier, and whose responsibility it is, continuing to rage on.

Foodservice has been pushing the boundaries. This ranges from the introduction of soft drink taxes in high street restaurants and trials of healthy and sustainable school meals, to continued product reformulation and thought leadership on improving chefs' nutritional understanding.

Footprint's Sustainability Index spotlights which parts of foodservice have made good progress, whilst highlighting the hottest emerging trends and opportunities, as well as which players need to do more on which issues.

**BE A
LEADER**

LEADING INSIGHT - 2016 ACTION POINTS:

- Create sustainable menus – the idea is catching on and taking hold. Own it, embed it and lead – it is the only way foodservice should think about food.
- Adopt a nutritional lens – demonising one ingredient/nutrient or trying to boost another can oversimplify things. Adopting a rounded nutritional lens to ingredients, recipes and supply chains is the best way to ensure food is truly healthy.
- Never mind the policy – do it anyway. The Responsibility Deal might have fallen by the wayside, but making out-of-home food healthier is foodservice's responsibility, whatever the policy/voluntary framework.
- Invest in chefs – chefs need better nutritional knowledge so ensure chefs in your supply chain undertake mandatory, high quality nutritional training.

In 2015, the big issues have been nutrition, sustainable meals, sugar, policy pressure, education and salt, whilst recurrent favourites such as fat, allergens and alcohol have barely made a splash outside of the wider nutritional context.

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NUTRITION



This year we have been bombarded with even more research and stats linking diet to ill health. 62% of adults in the UK are now overweight or obese ⁱ. Research has shown that obesity is fast overtaking smoking as the leading cause of cancer ⁱⁱ, while the World Health Organisation has labelled processed meat a carcinogen ⁱⁱⁱ. With 1 in 6 meals eaten outside of the home, foodservice plays a key role in the nation's health.

62%

of adults now
overweight
or obese

1 in 3

meals sold on the high
street now display
calorie labelling

100%

in BHA survey say
they are providing
healthier alternatives

7%

of Dine Contract
Catering customers
report switching from
indulgent 1 heart to
healthier 2 or 3 heart
options

£1.2M

invested by
Compass in
online recipe tool

Foodservice has made massive progress regarding health and nutrition in the last decade. Much of this has been health by stealth, from manufacturers cutting salt or sugar in everyday products such as bread, baked beans and soft drinks, to contract caterers redesigning menus to reduce fat and salt.

In 2016, health and wellbeing continues to be a significant industry trend with high consumer and client demand for healthier options with everyone from wholesalers to catering managers reporting that "customers are asking for it". This trend is also reflected in research ^v by Nielsen, Mintel ^{iv} and others. 100% of respondents in British Hospitality Association 2015 research ^v said they were providing healthier alternatives, but while this shows willingness, what percentage these healthier alternatives make of the overall offering is unspecified, and likely to still be inadequate.

One in three meals sold on the high street now display calorie labelling, including 70% of fast food and take away meals ^{vi}. Most major Quick Service Restaurants (QSRs) such as MacDonald's, have a range of healthier options and clearer customer nutritional information, but what proportion of sales these product lines make up is generally unclear.

However, whilst casual dining has made some advances in this area, hospitality is rarely designed to be a nutritionally balanced experience. It's an area that urgently needs attention, and with consumers demanding it, it presents a massive business opportunity.

HOT

OPPORTUNITY

Make sustainable nutrition the lens



GAME CHANGER

The organisations leading in this area are the ones going further than tinkering around the edges to research and implement inspired ways to make the whole out-of-home food experience healthier.

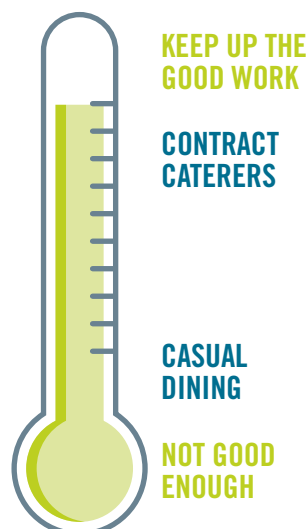
Whilst issues of salt, fat and sugar are all important, industry insiders from scientists to sugar pressure groups note that providing healthy balanced meals is the most important aspect in ensuring good general nutrition, rather than demonising one component or trying to add a particular nutrient in. It's a harder concept to define and sell though, which is why single-issue campaigns can be so successful.

GAME CHANGER

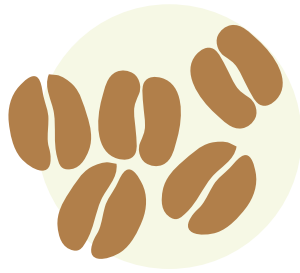
Taking a sustainable nutritional lens is the key as it ensures sustainably sourced ingredients are used to make healthy meals. Framing foodservice in this way highlights the need to go beyond what you can do with product innovation to shift entire menus and shift peoples' behaviour. This is where the promise lies – it just needs testing and trialling so it can be scaled up.

Contract caterers have taken on board the nutrition challenge more readily, partly because their business and industry clients understand that healthier menus lead to better staff performance. The leaders, such as Compass, CH&Co and Sodexo, have invested heavily in reformulating menus, giving more promotional attention to healthier options and meal deals, and educating customers on healthy choices.

One CH&Co project combined nutritional and lifestyle advice with lower calorie options in the restaurants in a 12-week trial. This holistic approach helped Gatwick Airport shift workers lose weight, inches and to reduce their cholesterol and blood glucose levels. A research project by the same company used social norms to increase vegetable consumption by 7% just by making diners aware through table talkers and signage that eating vegetables was the norm. Other simple, but notable, initiatives include Brighton University removing the trays in catered halls, which had the immediate effect of reducing portion size (and waste), whilst others have reduced chip portion sizes but allowed customers to ask for more, with hardly anyone coming back for a second helping.



SUSTAINABLE MEALS



GAME CHANGER

The idea of sustainable meals which offer food which is healthy for both people and planet is slowly but surely building traction with industry insiders from suppliers to distributors and contract caterers predicting it will become a mainstream trend.

Protein has become a main source of focus, with everyone from Michelin-starred chef Alain Ducasse to Compass and IKEA trying to use less meat. The Protein 2040 project aims to bring industry together to assess how 9 billion people can get the protein they need in the future whilst reducing health and environmental impacts. However, whilst potential innovations include kitchen-top mealworm farms to laboratory grown meat, sustainable meals are often remarkably low tech.

Sodexo has launched a WWF-partnered pilot to introduce “green and lean” sustainable meals at eight independent schools. The project reinvents crowd-pleasing classics like lasagne to be healthier and planet friendly by upping vegetable content whilst reducing fats, salts and animal proteins, at virtually the same cost and with no loss to customer satisfaction. After positive results, the company hopes to roll out the program more widely, which would have ripple effects across the whole industry.

There are other front runners. Hugh Fearnley-Whittingstall’s four restaurants were some of the first to try to serve sustainable menus with locally sourced, organic products and an emphasis on less, but higher welfare meat. Others are catching up. The Michelin-starred chef Alain Ducasse caused a stir when he announced his newly re-opened restaurant at the Athénée Hotel, Paris, would embody “naturalité” or naturalness, with vegetables and fish taking centre stage, a reduced amount of meat on the menu and largely organic produce.

London’s The Grain Store ethos is to give plants equal billing to meat, IKEA has launched vegetarian meatballs, while Pret found that a staggering 96% of their customers would support a 100% veggie Pret or a veggie only fridge in every shop. Caterer Vacherin has also launched “sustainable” menus.

However, whilst there have been pockets of activity, the sustainable menu must become mainstream.

REPORT CARD

Pockets of good practice, but whole industry must try harder

HOT

OPPORTUNITY

EDUCATION

90%

of people believe chefs should take an interest in the nation's health

88%

of the industry who say they are training chefs/others on healthy eating

1.6M

children receiving free school meals after introduction of free school meals, up from 300,000

NUTRITION

nutritional training must become the norm

From the School Food Plan to Footprint's own white paper on improving the nutritional content of catering colleges' syllabuses, education is a hot topic.

Caterers have responded fantastically to the challenges set by the Department for Education in their School Food Plan to find more local, sustainable food, and healthier ingredients. The continued success of Universal School Meals ensured operators supplying in the space kept nutrition at the heart of their offering. Meanwhile, the School Food Plan confirmed in spring 2015 that food and cooking would become a part of the educational curriculum.

Educating the engine room of the future

GAME CHANGER

However, the nutritional understanding of the nations' chefs is still woefully inadequate with nutrition barely featuring in catering education, despite colleges being perfectly placed to dramatically change the culture, particularly from a default of using salt, fat and sugar to create flavour. CASH research has shown that 90% of people believe chefs should take an interest in the nation's health, and that 70% think chefs should be more responsible for helping consumers to eat less salt ^{vii}.

Work by Footprint and Nestlé Professional is underway to identify the quickest and most effective way to ensure nutritional education is incorporated in the catering syllabus, with a white paper coming later in Spring 2016.

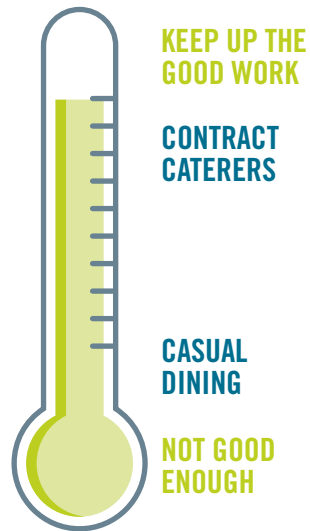
The British Nutrition Foundation have launched a short chefs' nutrition module which makes basic nutritional training accessible for organisations that do not have the resources to do it in-house.

Some contract caterers, such as Sodexo and Compass, are attempting to tackle the knowledge gap with excellent in-house nutritional training, dieticians, recipe analysis and considered menu planning. However, the training is not mandatory.

88% of the industry say they are training chefs/others on healthy eating ^{viii} whilst the Association for Nutrition have created a guide for contract caterers to define and advance caterers' own, in-house training modules.

Things are definitely beginning to move in the right direction, but there is still little being done on tracking how many chefs have actually been trained, and ensuring that those who have not received training, get it.

The industry needs to step up and commit to ensure working chefs have ongoing nutritional training so that recipes, menus and rotations are automatically designed with good nutrition in mind.



SALT



the average adult eats 1/3 more salt every day than the RDA



80% of the salt consumed with food in the UK is put there by the food industry

Salt reduction has been a real success story in the UK, with many food products now 20-40% lower in salt than they were 10 years ago. However, the out-of-home sector was only included in the Government Health Responsibility Deal in 2014, and is still lagging behind the rest of the food industry.

Indeed, as of March 2015, only a handful of signatories had signed up to each of the pledges, with the whole deal now apparently sidelined in favour of the government's soon-to-be-launched childhood obesity strategy. Impetus has also been lost since the FSA was relinquished of the job of monitoring the voluntary agreement.

Research on levels of salt in childrens' meals by World Action on Salt and Health found that while some UK outlets of popular fast food chains had up to six times lower levels of salt than their international counterparts^{ix} - for example, KFC's popcorn chicken in the UK vs Costa Rica - this same meal, at 0.9g, was still nudging the 1g total of a child's daily allowance.

Figures also show that the average adult is eating a third more salt every day than the recommended 6g. 80% of the salt consumed with food in the UK is put there by the food industry - that is, it is in processed foods, fast foods, canteen and restaurant foods^x.

Salt has registered on the foodservice agenda, with 94% of respondents in BHA research saying they were reducing salt, it just is not translating into hard enough action. Foodservice needs to dramatically up its game.

Contract caterers and manufacturers are doing the most at present, with organisations such as such CH&Co reaching 2017 targets in 2015 by taking a rounded approach to salt reduction ranging from training their chefs and product reformulation to salt tolerance tasting sessions.

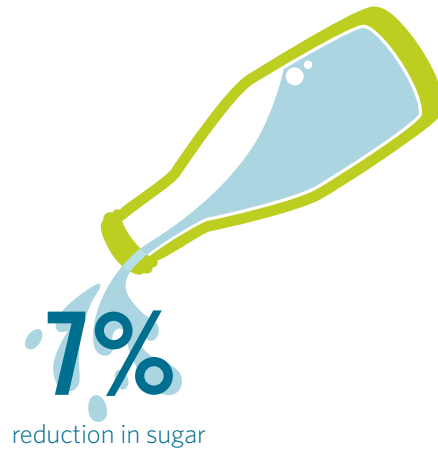
CASH research in 2015 concluded that progress on salt had been patchy with "no 'gold standard' companies," with progress needed across the board. In comparison, companies "appear to be doing much better in their children's dishes, with nearly two thirds of those surveyed already meeting the Department of Health's maximum per serve target for children (1.8g/serving)." ^{xi}



TAKE

ACTION

SUGARY DRINKS



Barging salt and saturated fat out of the way, sugar has hogged the limelight as public health enemy number 1 in the last year. A report by Public Health England, published in October 2015, included the recommendations of a 10-20% tax or price increase on high sugar products such as drinks, and further curbs on marketing to reduce intake.

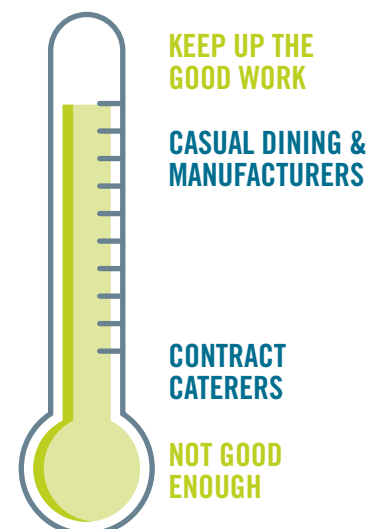
Jamie Oliver brought the campaign to the mainstream public with a TV programme and lobbying efforts, whilst his restaurant chain aimed to lead by example by adding its own levy to sugar-added soft drinks. He also supported Brighton and Hove in becoming the first city in the UK to introduce a voluntary sugar tax, and urged others to follow suit. The health select committee agreed such a tax is essential, whilst doctors and hospital chiefs also backed the idea.

Meanwhile, 2016 started with a study in the Lancet concluding that incrementally cutting sugar in soft drinks by 40% over five years could slash rates of obesity and diabetes.

Drinks manufactures are working on this, with calories across the category down by 7.3% over the last 3 years, according to the latest figures from Kantar Worldpanel. Manufacturers, like Coca-Cola and Britvic, have been reducing sugar significantly across some ranges (although sales of Coca-Cola Life, a lower sugar cola sweetened from natural sources, are apparently floundering which is a great pity).

And, after hitting the spotlight in 2014 when media reports published the amount of sugar in natural juice drinks, even juice/smoothie manufacturer Innocent are trying to reduce the natural sugar content by introducing vegetables in its smoothies and launching new ranges which mix fruit juice and water to make a lower calorie drink.

But more industry-wide action is needed to level the playing field and get everyone reducing sugar levels harder and faster.



POLICY PRESSURE

More tax please, we're British



2015 was characterised by calls for a whole raft of different food related taxes and mechanisms as concerns about obesity grew, whilst the global agreement signed at COP21 in Dec 2015 could increase pressure on government interventions in 2016, although it has not had much of an impact on the ground as yet.

Meanwhile, the Public Health Responsibility Deal published some successes in the spring, but then went quiet after the election, apparently sidelined and overtaken by the governments' soon-to-be-launched childhood obesity strategy.

Sugar took the lion's share of the focus (see above) with Prime Minister David Cameron starting to soften on the idea of a tax... There have also been calls for wider bans on advertising junk food to children, including pre-watershed, and faster re-formulation. Meanwhile, the Local Government Association (LGA) is urging pubs, restaurants and cinemas to display calorie information as part of a voluntary initiative.

Processed fruit snacks also came into the firing line as new research revealed that 85% of them contain more sugar per 100g than sweets, such as Haribo Star Mix, even though many parents think the snacks are a healthy choice.

Mandatory free fruit and veg snacks in schools were being mooted after an American study demonstrated that £48 spent on fruit and vegetables reduce the obesity rate by 3%. This was much cheaper than the £217 per-student per-year cost "break even point" to reduce childhood obesity by just 1% ^{xii}.

Whether a sugar tax is introduced, or the, somewhat toothless, Responsibility Deal is now defunct is irrelevant as these instruments just represent what a responsible industry should be doing anyway to overhaul its ingredients, products and menus to ensure healthier options are available more widely and more routinely to consumers. So, whether it is in the context of industry-led action, a voluntary agreement or legislation is irrelevant, foodservice should be taking action because it is the right thing to do, whatever the policy landscape.

TAKE

ACTION

GAME CHANGER

**KEEP UP THE
GOOD WORK**

CAMPAIGNERS

GOVERNMENT

**NOT GOOD
ENOUGH**

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