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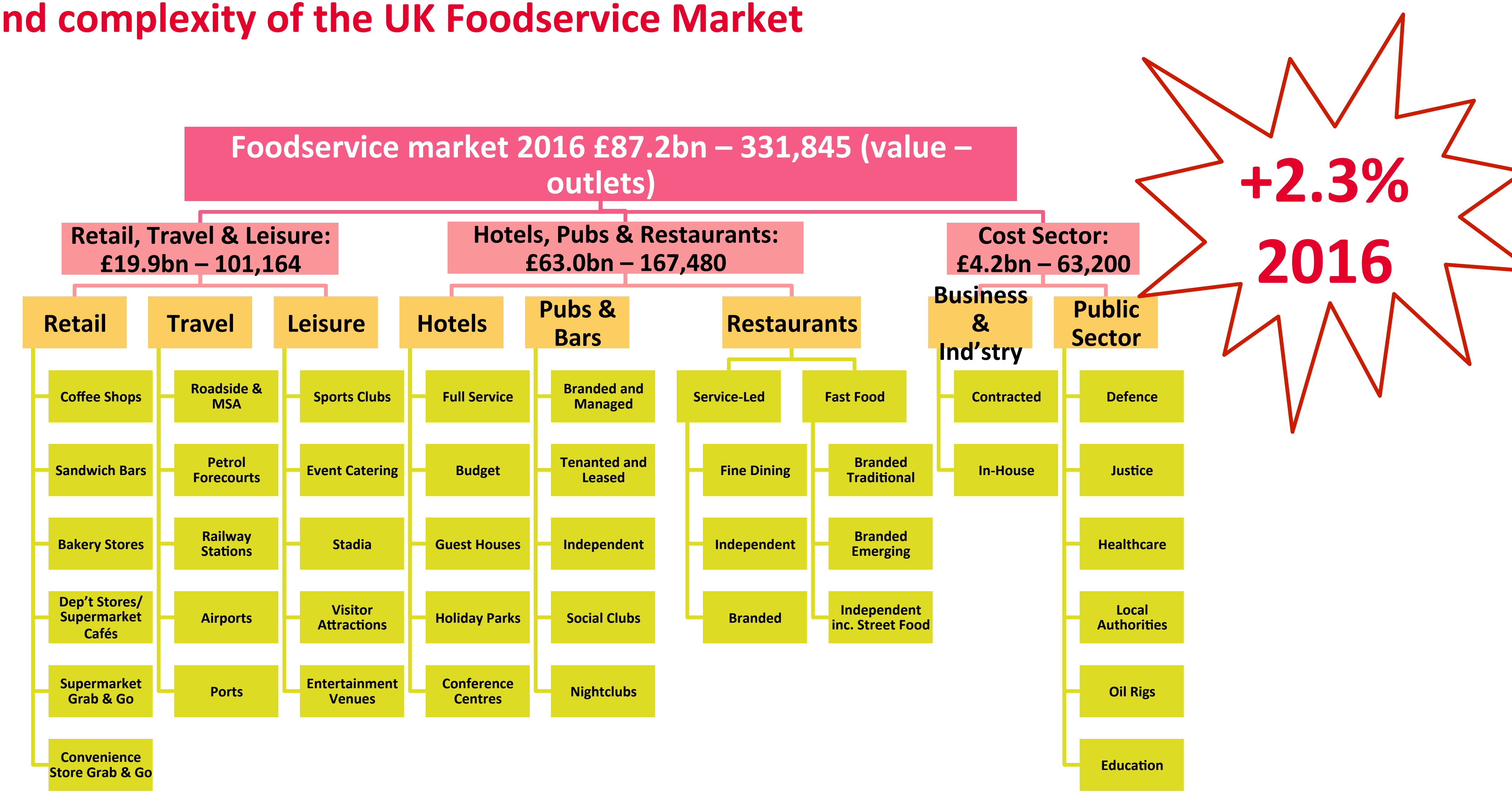
Eating and drinking out market insight.

The UK Foodservice Market –
The complexity, the trends, and the opportunities

The size and complexity of the UK Foodservice Market



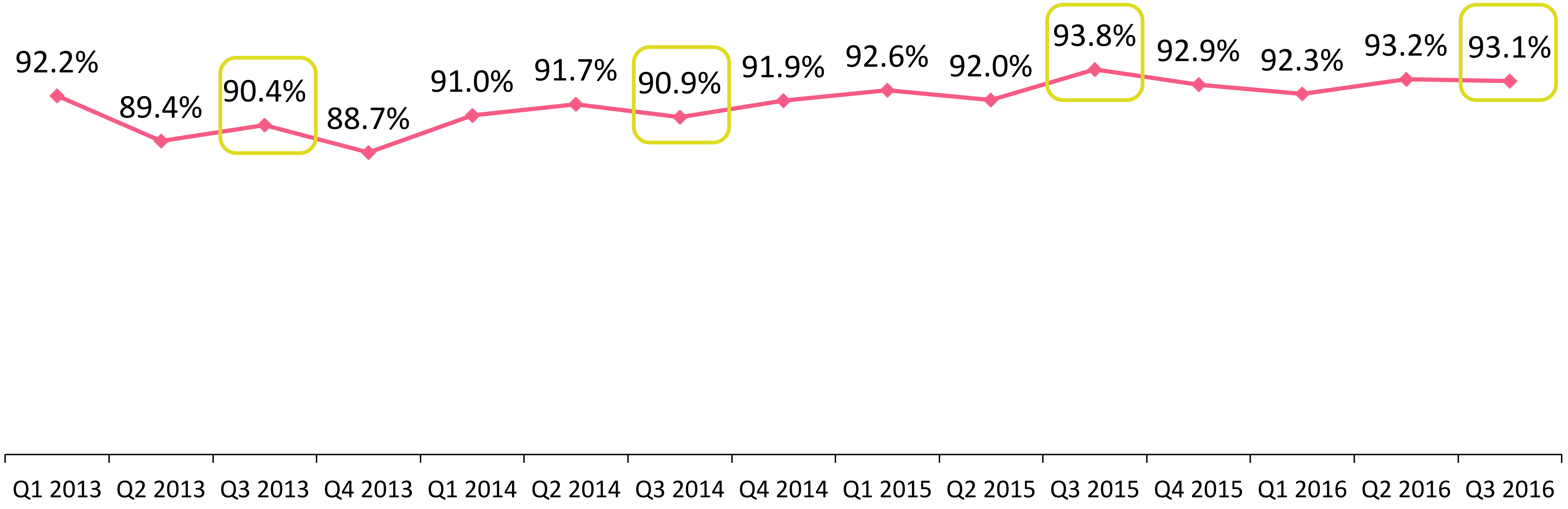
Simplicity of Retail vs. Complexity of Foodservice

UK Grocery Market

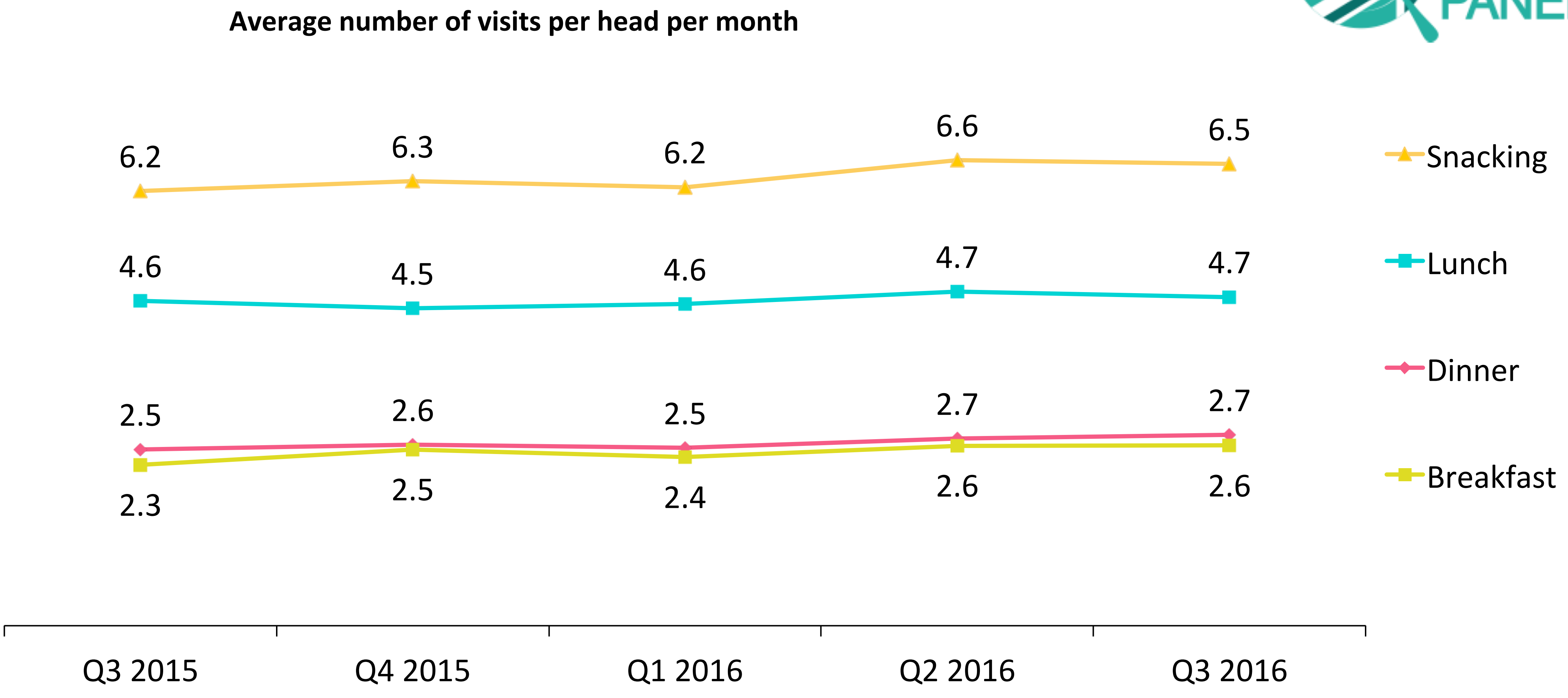
90% of the total market
sold by 7 large retailers

Brands and independents share the market

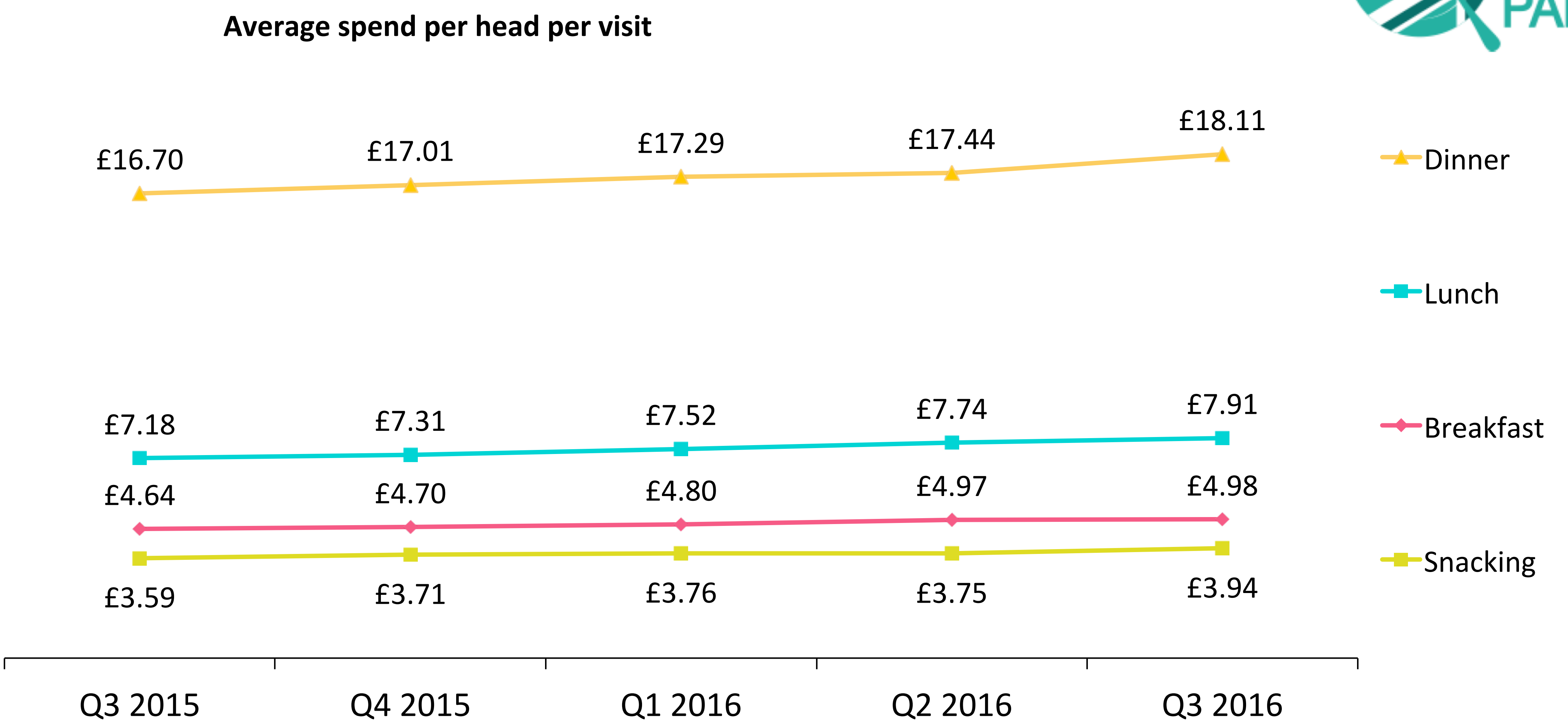
Eating out participation: Q1 2013 – Q2 2016



Frequency by day-part: Q1 2015 – Q2 2016

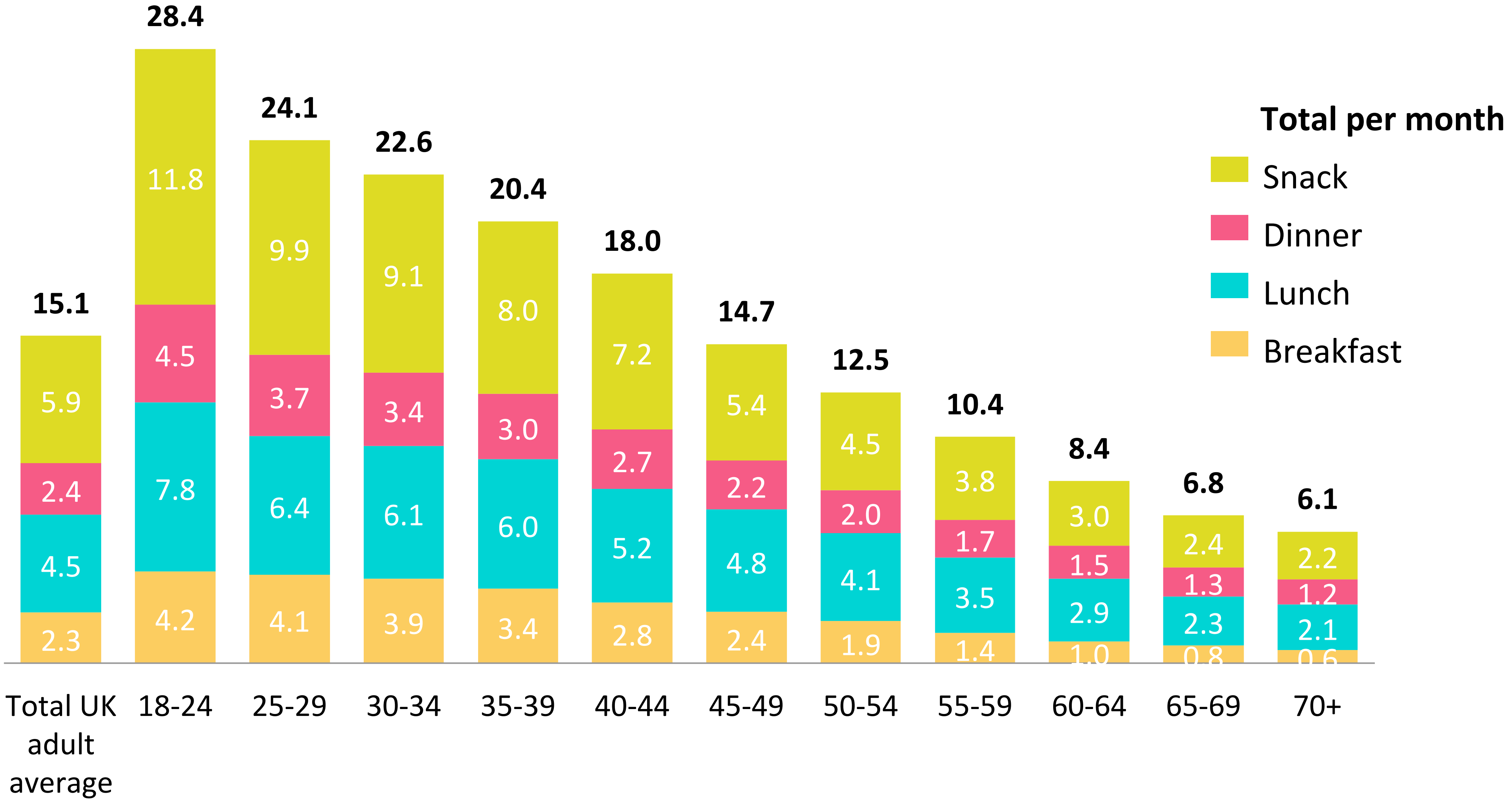


Average spend by day-part: Q1 2015 – Q2 2016

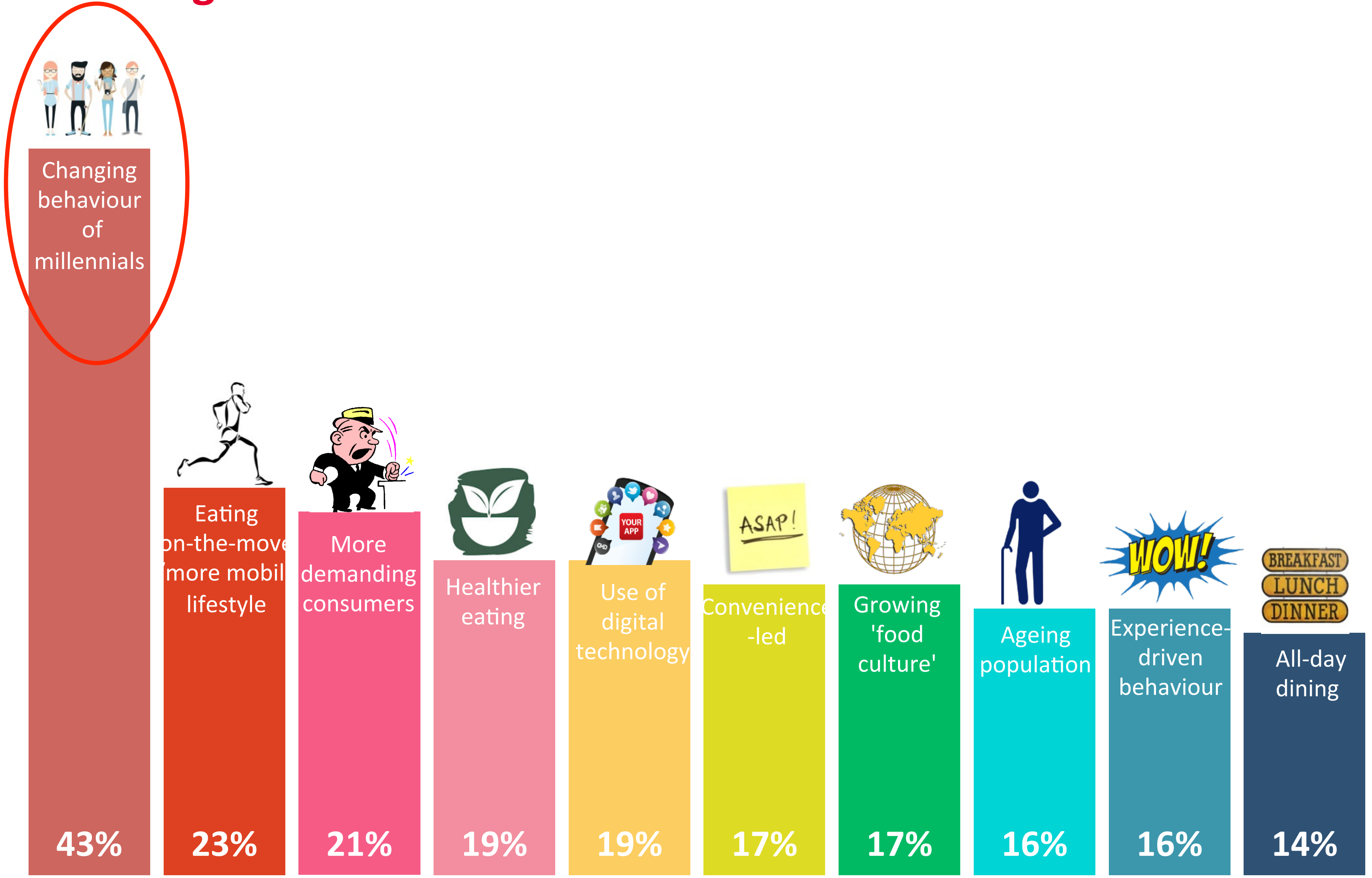


The Ageing Consumer

The Ageing Demographic - Eating out frequencies



Most important long-term consumer trends



The six mega trends in the marketplace

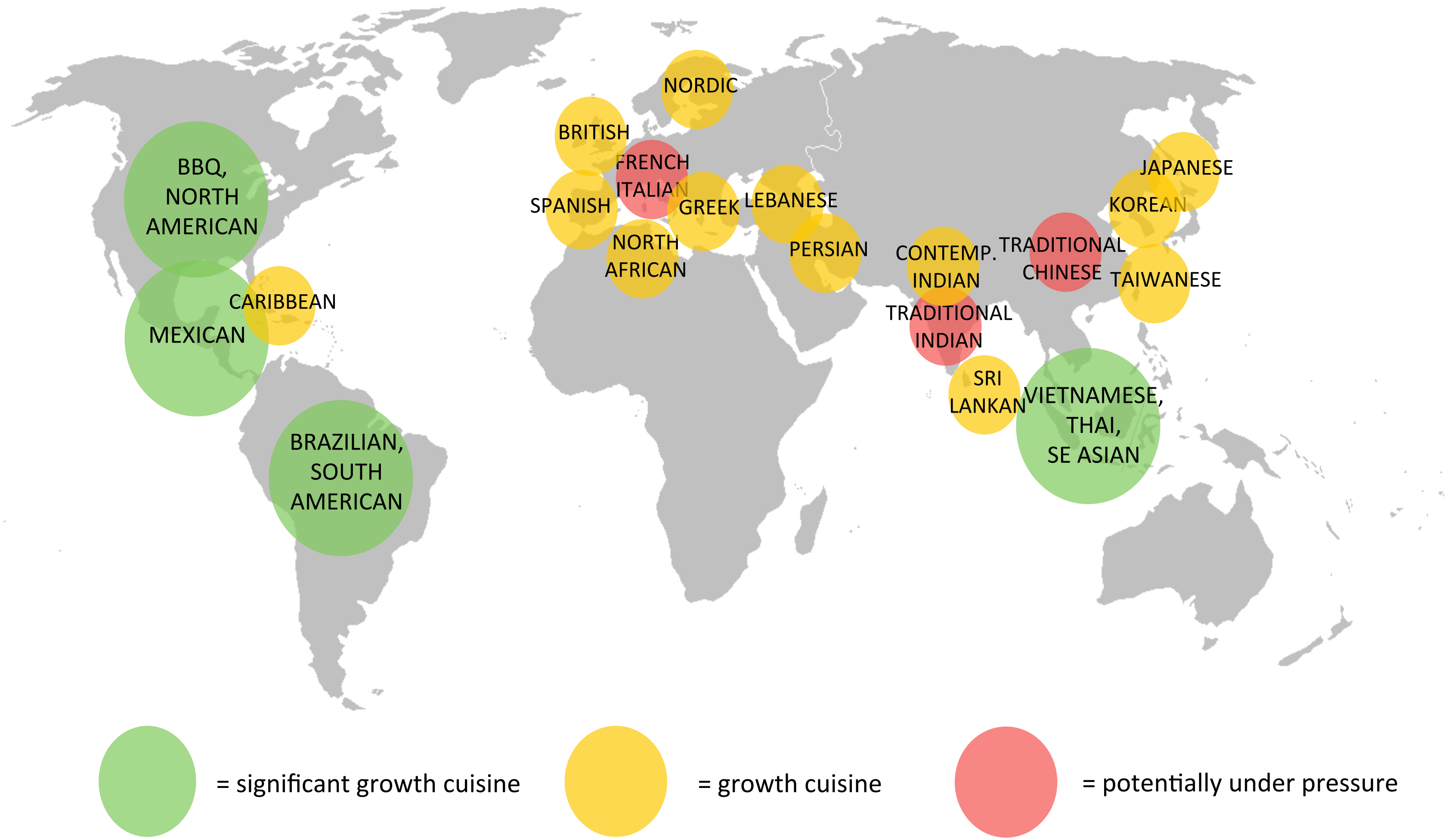
MEGA TRENDS

Healthier eating	Indulgence	Informality	Premiumisation	Provenance	Value scrutiny



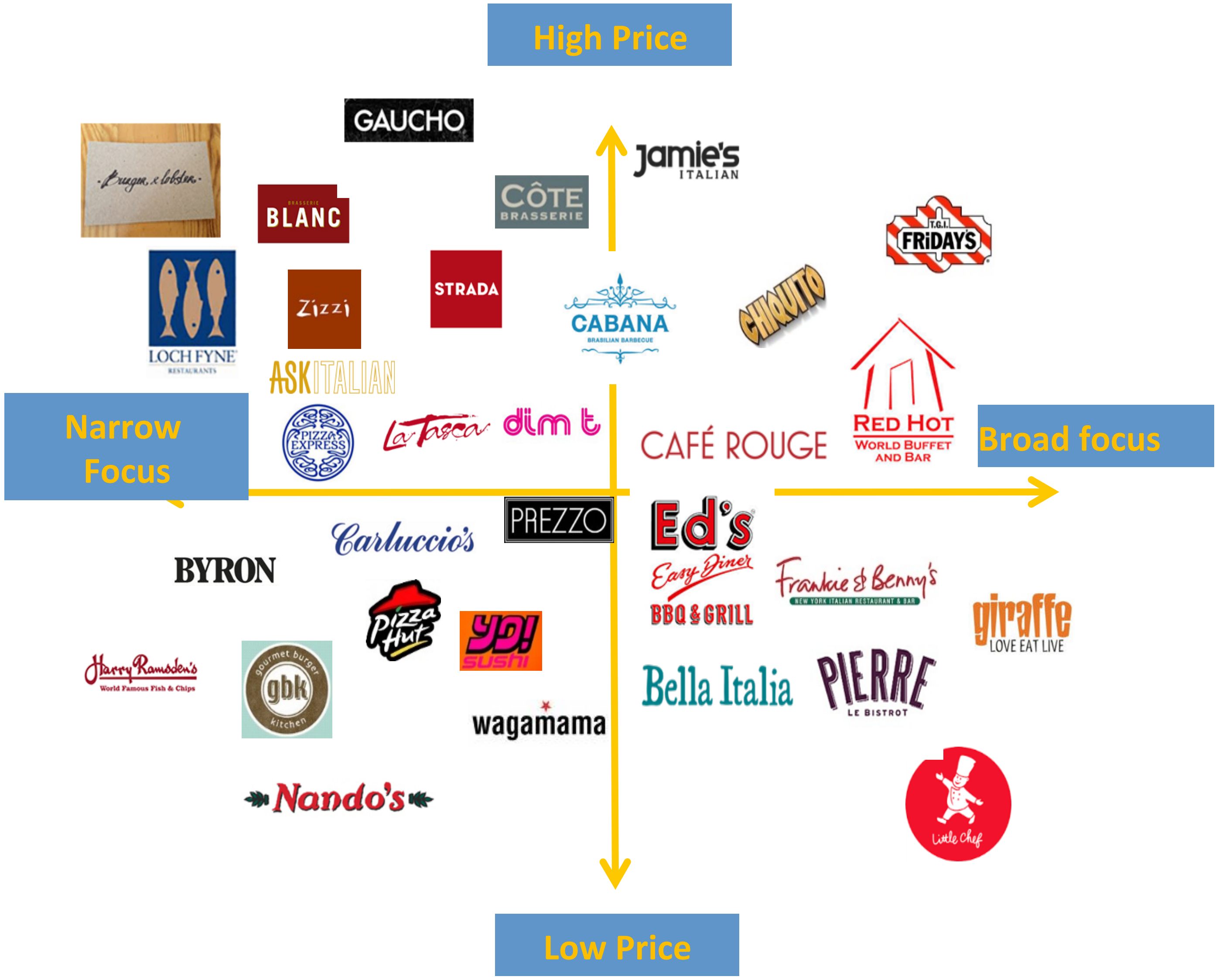



Cuisine trend hotspots in 2016



A new era of Premiumised Informality, driven by Food Pleasure Seekers

A highly competitive landscape

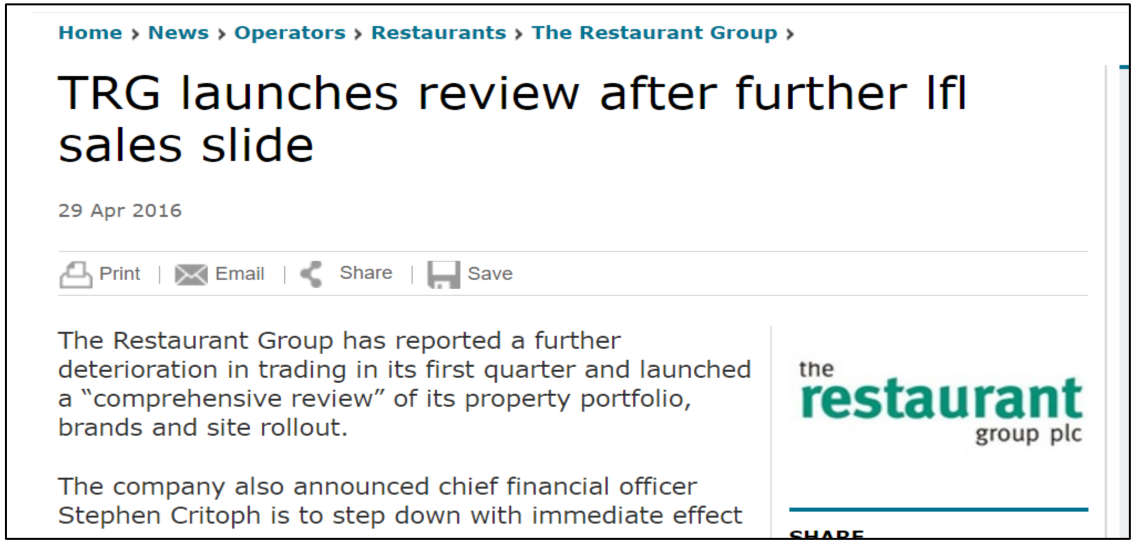


With competition growing all round – especially at the value end of the spectrum

McDonald's reports first quarter results for 2016 and confirms ten years of growth for the UK business

LONDON, UK – 22 April 2016

Getting squeezed in the middle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TRG launches review after further lfl sales slide

29 Apr 2016

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The Restaurant Group has reported a further deterioration in trading in its first quarter and launched a "comprehensive review" of its property portfolio, brands and site rollout.

The company also announced chief financial officer Stephen Critoph is to step down with immediate effect

the restaurant group plc


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H1 lfls down 1.6% at M&B

19 May 2016

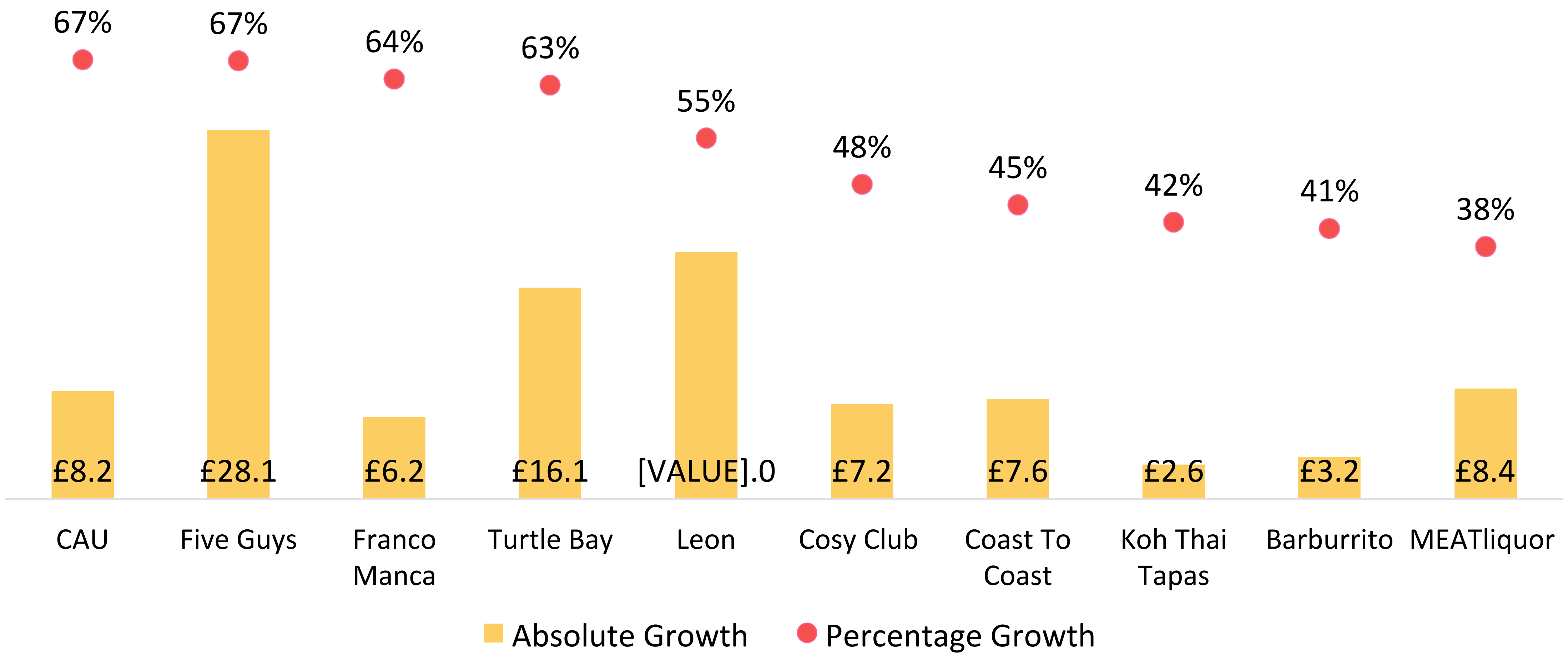
Harvester → MILLER & CARTER - STEAKHOUSE -

THERE CAN BE
NO CASUAL APPROACH TO CASUAL DINING

Contemporary chains – those that have developed in the past 10 years

BENITO'S HAT
CABANA
WILDWOOD
MISSION BURRITO
Burger & Lobster
COAST TO COAST
American Restaurant & Bar
CAU
wahaca
THE STABLE
PIZZA · PIES · CIDER
FRANCO MANCA
BYRON
Gigalina Squid
TURTLE BAY
ROSSOPOMODORO
cucina e pizzeria napoletana
GUSTO
CÔTE BRASSERIE
Jamie's ITALIAN
HONEST
COSY CLUB
COMPTOIR LIBANAIS
handmade burger Cº

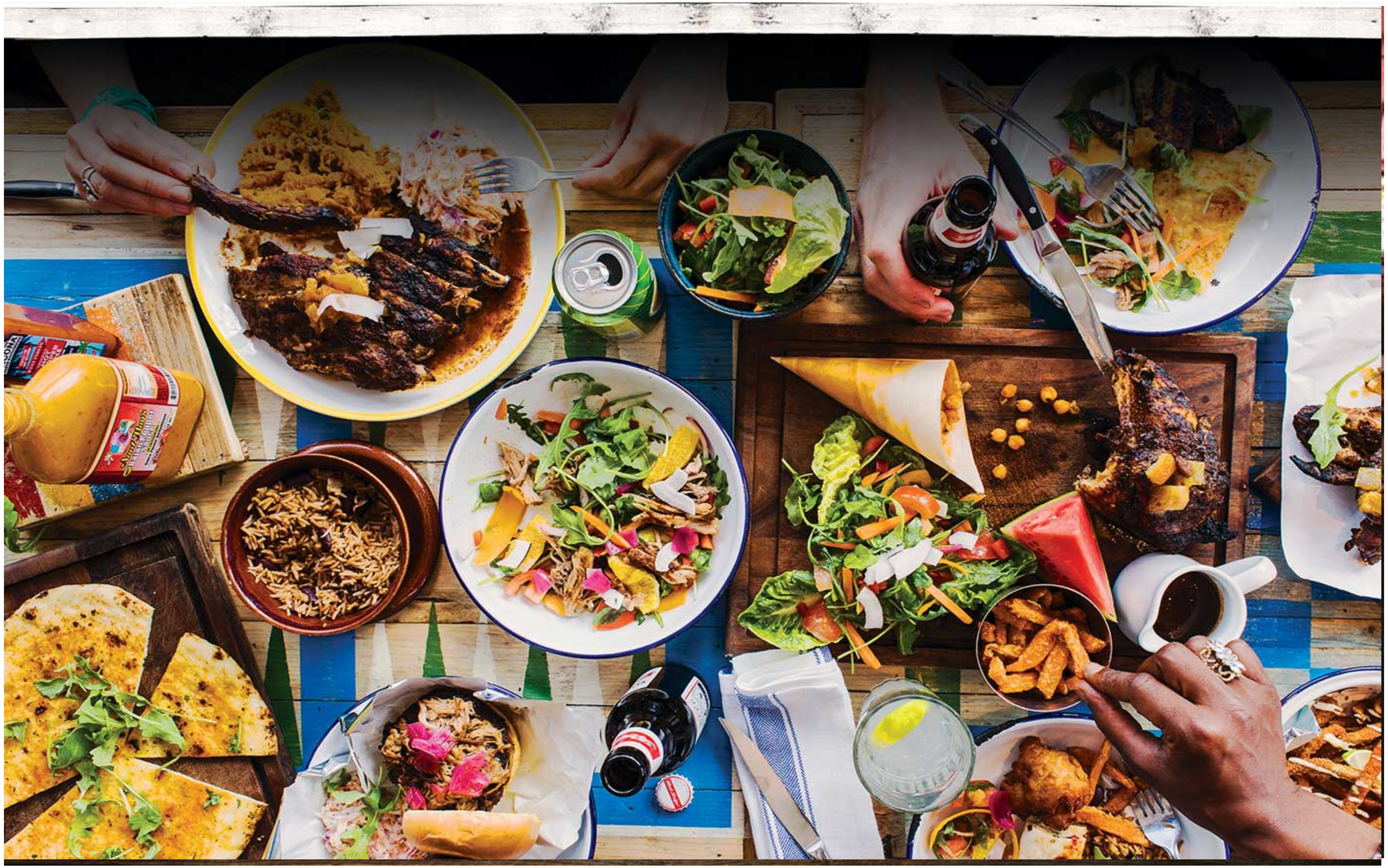
Top 10 brands - Percentage sales growth – 2015-2016E



Disruptors and Influencers

Challenges to brands from quality independents

Contemporary consumers seeking faster fashion food will fuel restaurant growth



The Eating Out Seesaw

The Eating Out seesaw is tipping

towards WOW foods,

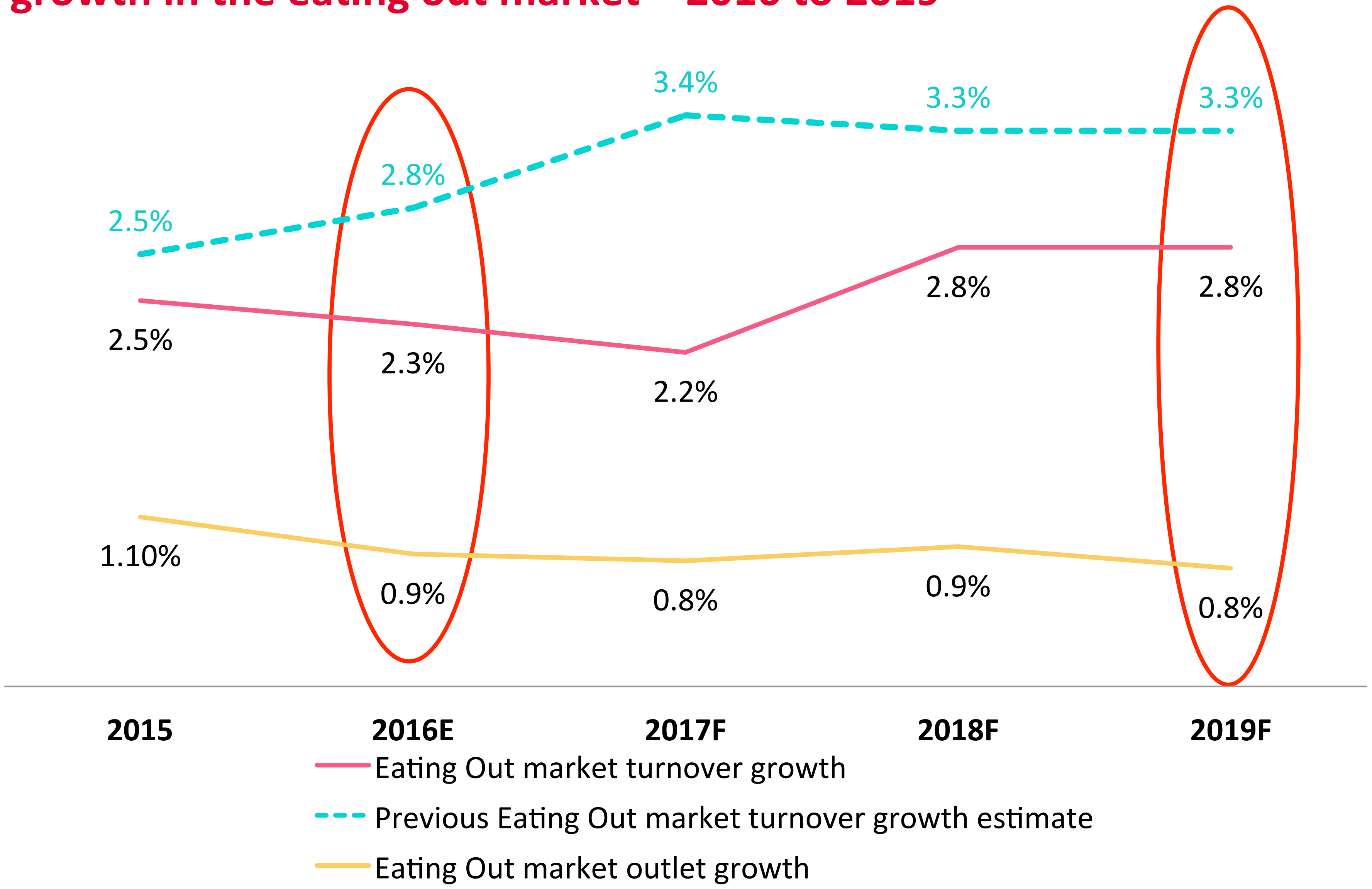
and away from Worthy foods.

Tipping towards WOW

But is it tipping back……..?


The future?

Forecast growth in the eating out market – 2016 to 2019



What does it mean for Farmers?

+2.8%
2019

A growth market – one to get involved with

Provenance is a mega trend that Farmers can deliver against

Healthier Eating is a mega trend that can be an opportunity for farmers

Consumers are habitually eating out of home but are seeking great value

More adventurous tastes and demand for experiences give scope for different products

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Thank you!

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