



FOODSERVICE CONSULTANTS SOCIETY INTERNATIONAL
UK & Ireland



Allegra FOOD STRATEGY FORUM

TASTE OF THE FUTURE 2020
OCTOBER 2013

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Background and Methodology

	Details
Objective	<ul style="list-style-type: none"> • Understand industry views on the state of the foodservice sector in 2020 • Providing the FCSI and the Food Strategy Forum with Thought Leadership around the key trends over the next 7 years
Key focus areas	<ul style="list-style-type: none"> • Economic and foodservice market changes • Consumer trends in 2020 • Cuisine changes and attitudes towards healthier eating and sustainability • Corporate competencies for 2020
Number of interviews	<ul style="list-style-type: none"> • 110 interviews with senior executives and consultants across the UK foodservice market • Interviewees drawn from FCSI members and Food Strategy Forum members • Additional insight provided by students from University of West London
Industry segments	<ul style="list-style-type: none"> • Suppliers: 35% • Consultants: 21% • Contract catering and public sector provision: 16% • Branded retail and leisure: 14% • Other (incl. wholesalers and manufacturers): 15%
Methodology	<ul style="list-style-type: none"> • Online in-depth interviews • Round table discussion with students
Timing	<ul style="list-style-type: none"> • Survey completed September 2013
Publish details	<ul style="list-style-type: none"> • October 2013 • 40 pages

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Executive Summary

- The future of the burgeoning UK Foodservice market presents significant opportunity for operators and suppliers:
 - Frequency of eating out will be significantly higher in 2020, with everyday eating out activity by consumers
 - The UK's ageing population will change the profile of diners and these high spending consumers will be an important source of income for the food and beverage industry
 - Key areas of demand and growth will open up, as healthier eating and global cuisines, such as South East Asian, Global and Nordic become more popular
 - Branded concepts that clearly communicate compelling brand values will prosper, with growing consumer trust
 - Consumer quality expectations will rise, which will improve overall sector standards and ignite greater competition among operators
- However, operators and suppliers are predicted to have a harder time in 2020, with substantial challenges to face, including:
 - Greater market consolidation, which will cause weaker brands and players to fall out the market
 - Higher food input costs, which will put pressure on suppliers and operators to be even more cost conscious
 - Skill shortages in the foodservice sector, which will become a greater problem as the number of vacancies rises and if prolonged, will prevent further market growth
 - Pressure to deliver exceptional quality, service and value for money to customers, whose expectations are far greater than before
- To succeed in 2020, operators will have to deliver experiences that excite and consistently deliver first class product quality and service. Strengthening loyalty within an ever more demanding customer base and against intensifying competition will only become more critical

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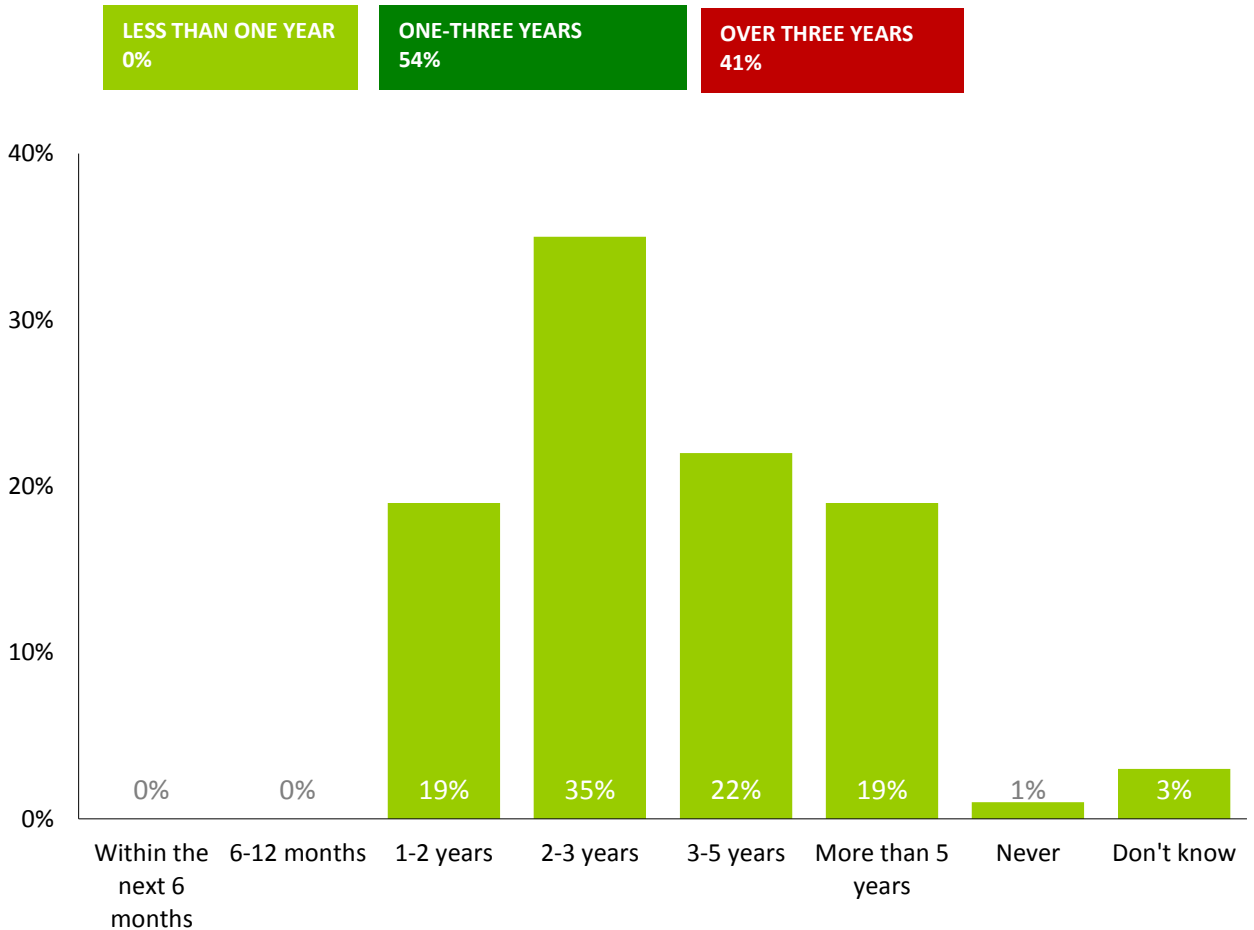
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Timing of full economic recovery

54% of executives expect full economic recovery to take one to three years, yet a considerable proportion, 45%, expect recovery to take over three years. The UK economy grew by 0.7% in the second quarter of 2013 and the economy is expected to strengthen further this year, driven by growing consumer confidence.

ECONOMIC RECOVERY, 2013.

When do you believe the UK economy will have fully recovered?
 Percentage of respondents



Source: Allegra Strategies industry research and analysis, ONS 2013

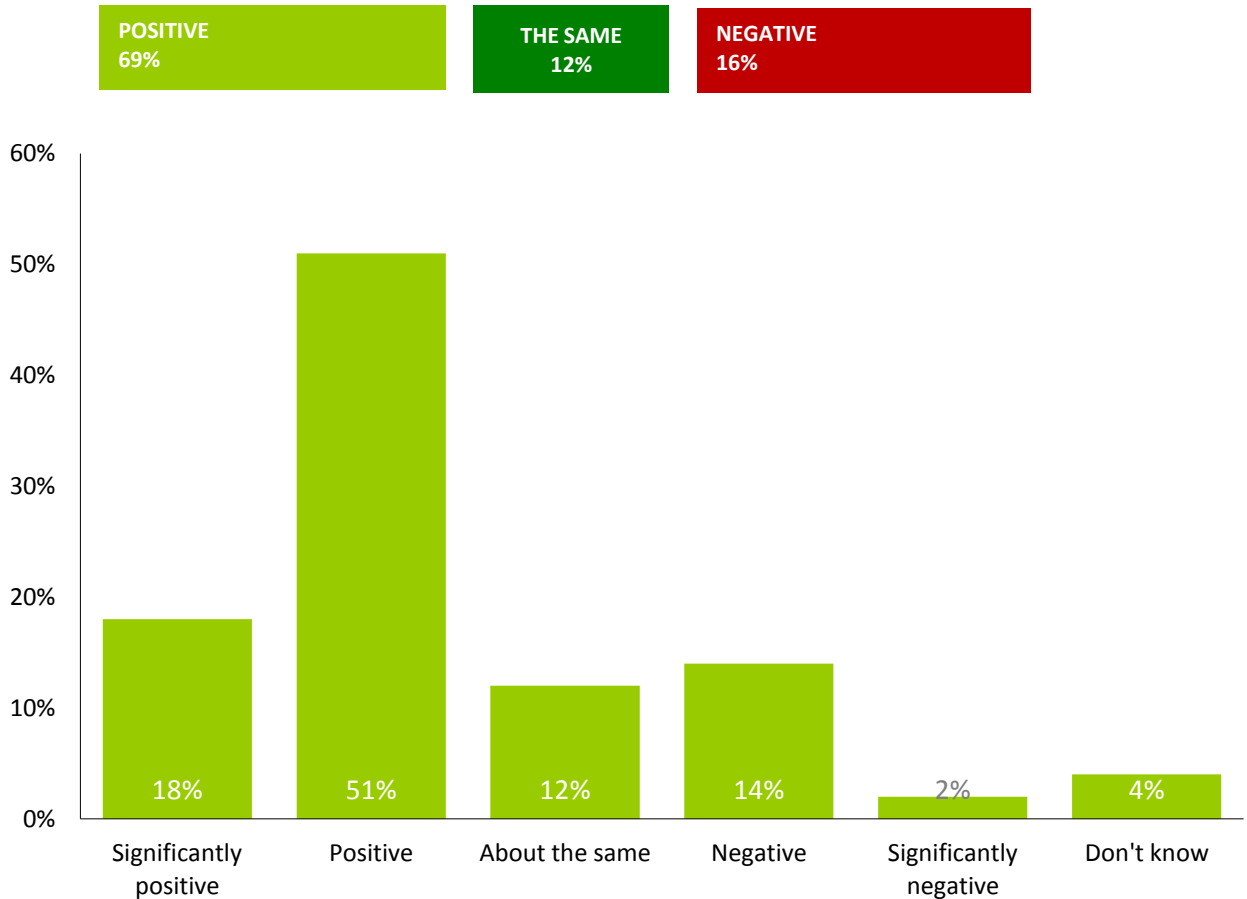
Ageing population and the Eating Out market

The ageing demographic is expected to have a positive impact on the eating out market, agreed by 69% of respondents. The over-65s are a key source of income for the food and beverage industry, contributing an estimated £25bn revenue to the industry*. As the UK’s population gets older, it will be critical to secure the income from this demographic which means engaging them and developing tailored offers to meet their needs.

IMPACT OF AGEING DEMOGRAPHIC.

To what extent do you believe the ageing demographic will have a negative/positive impact on the eating out market in 2020?

Percentage of respondents



Source: Allegra Strategies industry research and analysis, 2013, *Barclays corporate research, 2012

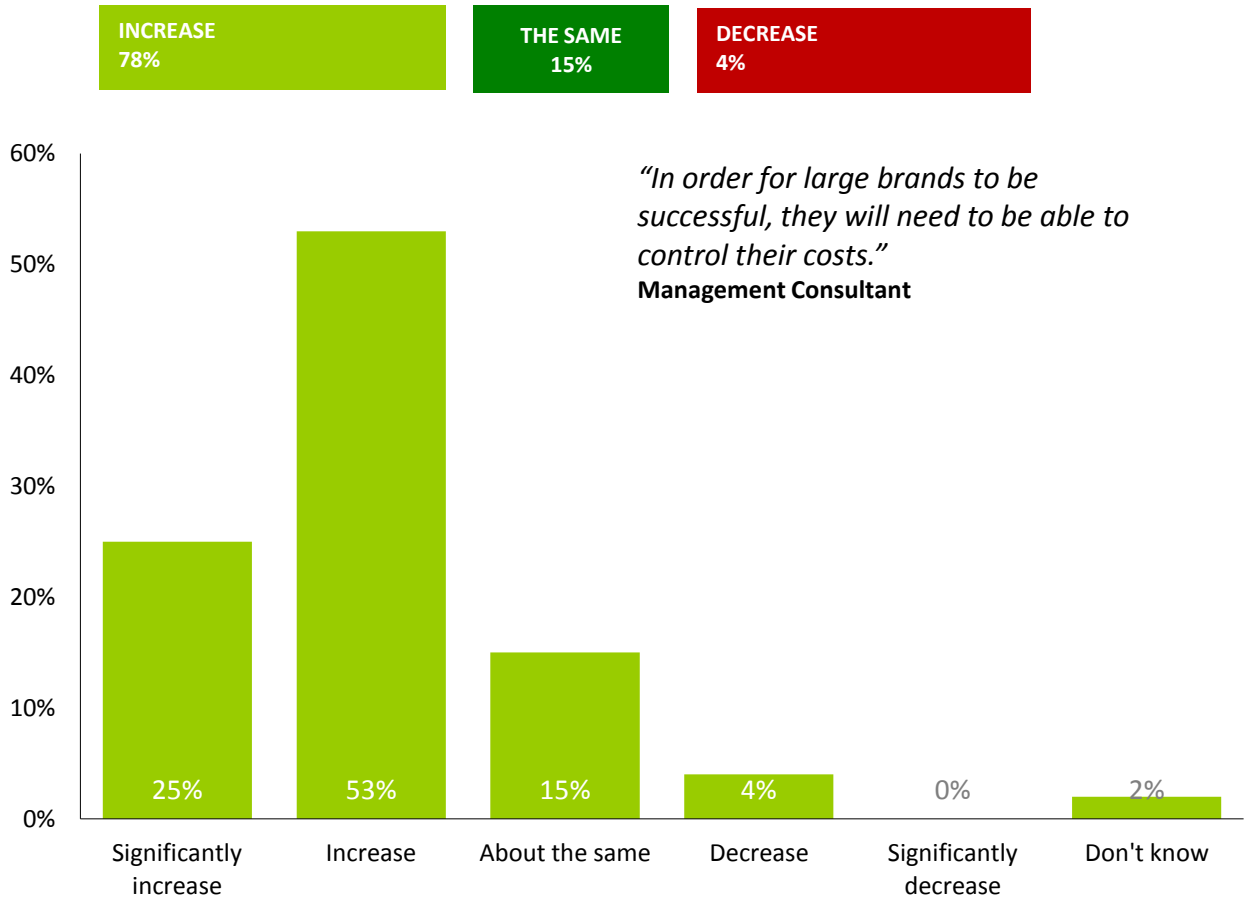
Food input costs

Food input costs are expected to be far higher in 2020 than they are today. This will have implications for suppliers and operators who will likely suffer from absorbing these increased costs.

FOOD INPUT COSTS

Will food input costs have increased or decreased by 2020 compared with today?

Percentage of respondents



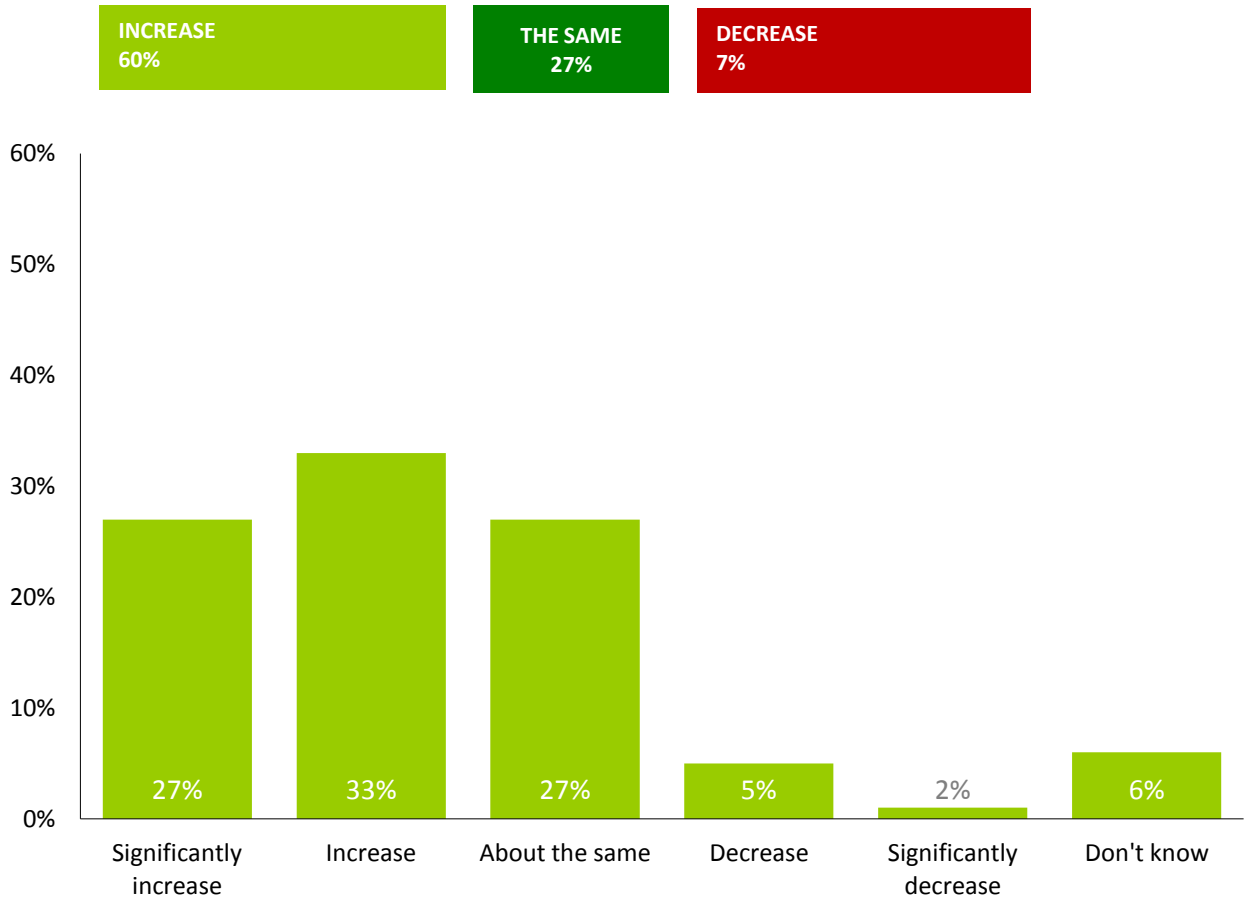
Source: Allegra Strategies industry research and analysis, 2013

Skills shortage

The skills shortage is expected to increase in the UK, according to 60% of respondents. The number of job vacancies in foodservice is set to rise over the next few years but the skills gap is also expected to increase, with kitchen and chef skills lacking. The return to stronger growth is likely to be held back by skills shortages in the foodservice sector.

SKILLS SHORTAGE IN 2020

Will the skills shortage have increased or decreased by 2020 compared with today?
 Percentage of respondents



Source: Allegra Strategies industry research and analysis, 2013

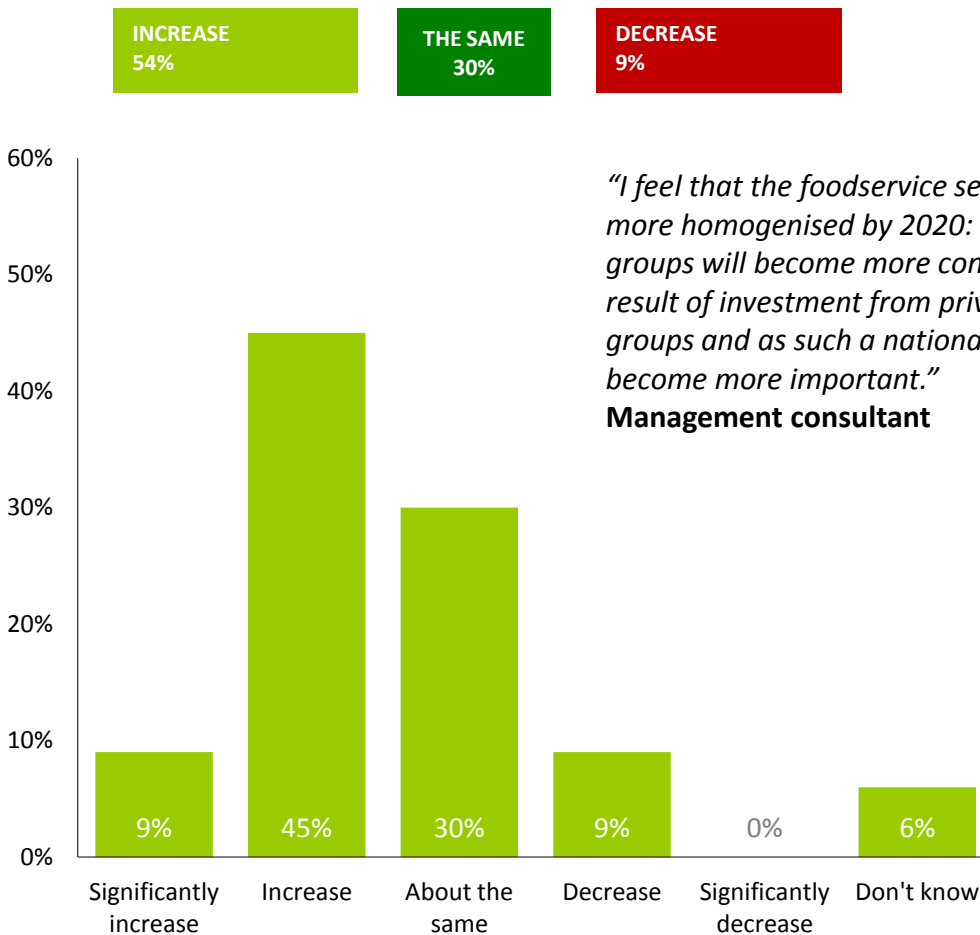
Eating out market consolidation

Consolidation in the UK eating out market is expected to be far greater by 2020 compared with today. Larger restaurant and pub groups will acquire smaller sized profitable propositions and weak small brands will fall out the market, replaced by on-trend quality establishments.

LEVEL OF CONSOLIDATION IN THE UK EATING OUT MARKET.

Will the level of consolidation in the UK eating out market increase or decrease by 2020 compared with today?

Percentage of respondents



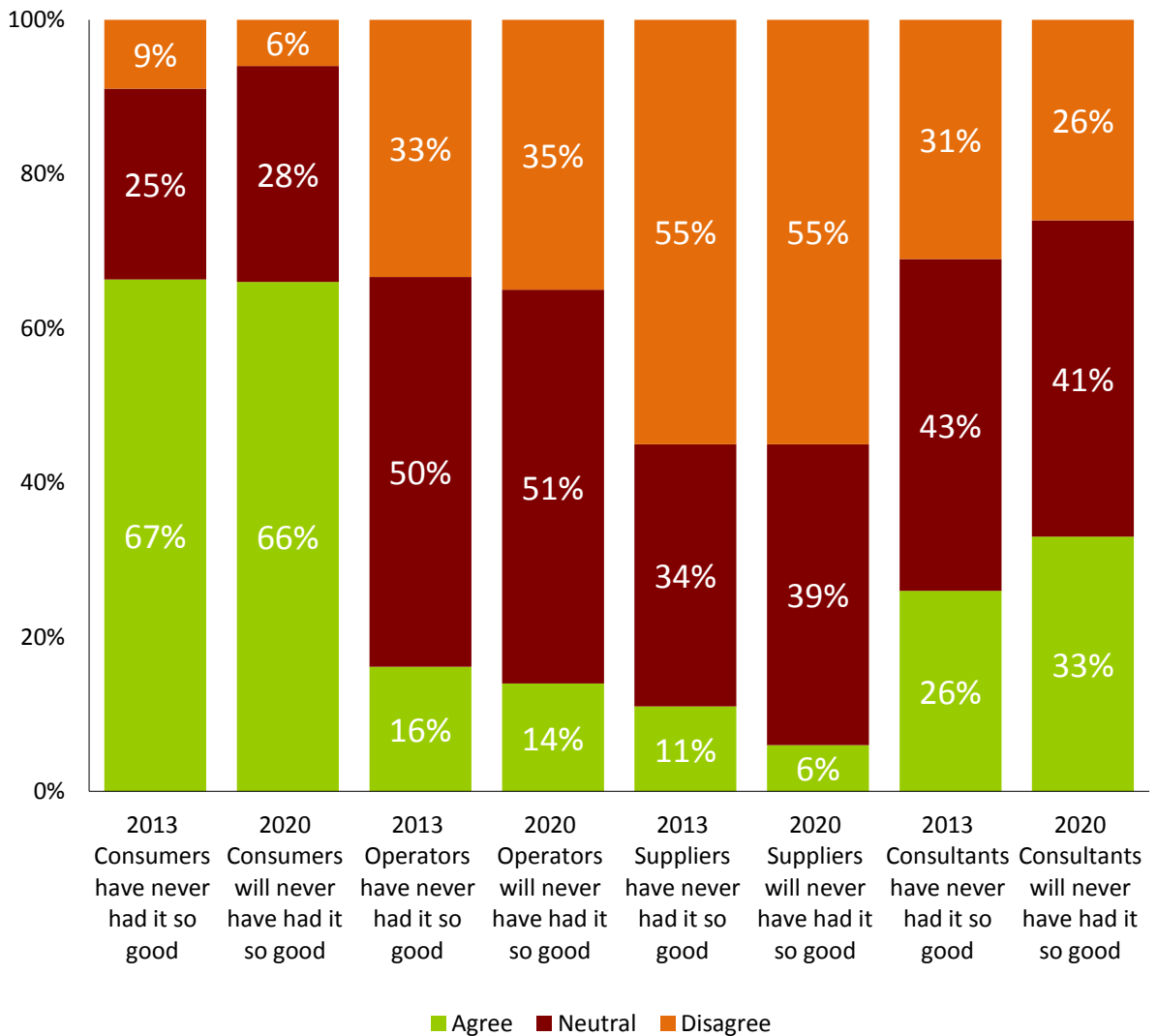
Source: Allegra Strategies industry research and analysis, 2013

F&B stakeholders – today and in 2020

Consumers are expected to be the winning stakeholders in this sector in 2020. The consumer is already king and by 2020, when market competition is rife, creating customer loyalty will be difficult. And in turn, this is why respondents indicate that operators will find it harder in 2020 than they do today. 55% of respondents believe suppliers currently have it difficult and by 2020 this is expected to worsen, as operators become more cost-conscious and drive supplier prices down. Rising input costs may also see suppliers absorbing greater costs. Consultants’ position is expected to improve, as the economy improves and demand and budget for their services rises.

POSITION OF FOOD AND BEVERAGE STAKEHOLDERS TODAY AND IN 2020.

Percentage of respondents



Source: Allegra Strategies industry research and analysis, 2013

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Eating out frequency compared with today

Frequency of eating out is expected to be greater in 2020 compared with today, agreed by three quarters of respondents. Eating out is more affordable than ever before and is now engrained in consumer lifestyle, with many people eating out on a weekly basis. As consumers become busier and more mobile, their eating out frequency will only increase. The profile of diners will change as the population ages and operators will need to think harder about how to attract this growing demographic.

FREQUENCY OF EATING OUT.

How will frequency of eating out in 2020 be different from today?

Percentage of respondents



Source: Allegra Strategies industry research and analysis, 2013

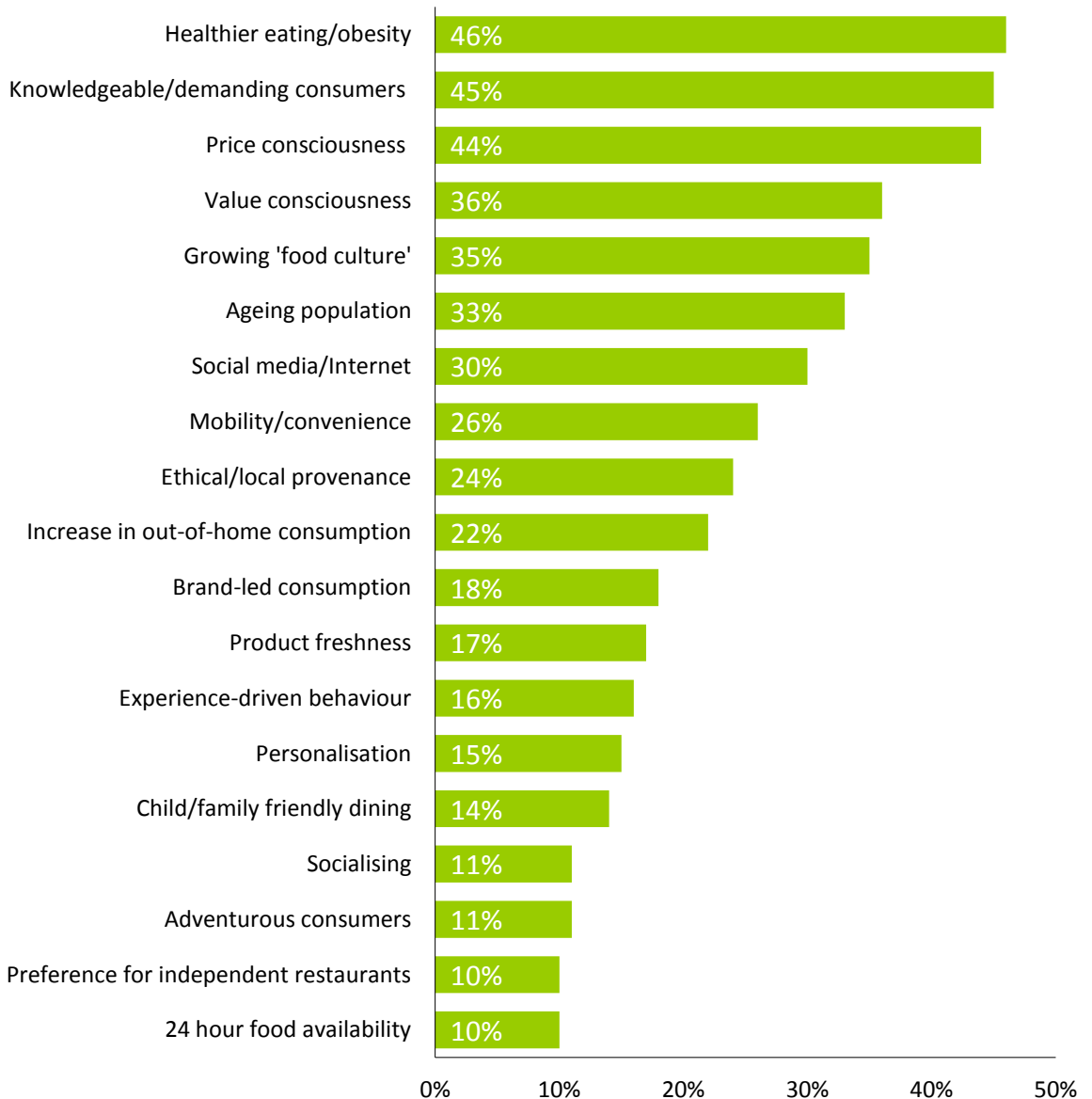
Long term consumer trends impacting F&B sector

Healthier eating already has and will continue to significantly impact the eating out market. It is considered the most important long term consumer trend, with consumers taking a far more holistic approach to their health and gaining a greater understanding of what it means to have a healthy lifestyle. Knowledgeable and demanding consumers is also a key trend, driven by greater accessible information on the Internet and also general interest in food from consumers. Price and value consciousness, which really took hold during the economic downturn, is now an established consumer trend.

LONG TERM CONSUMER TRENDS IMPACTING UK FOOD AND BEVERAGE SECTOR.

Which in your view are the most important long term consumer trends affecting the UK food & beverage sector?

Percentage of respondents



Source: Allegra Strategies industry research and analysis, 2013

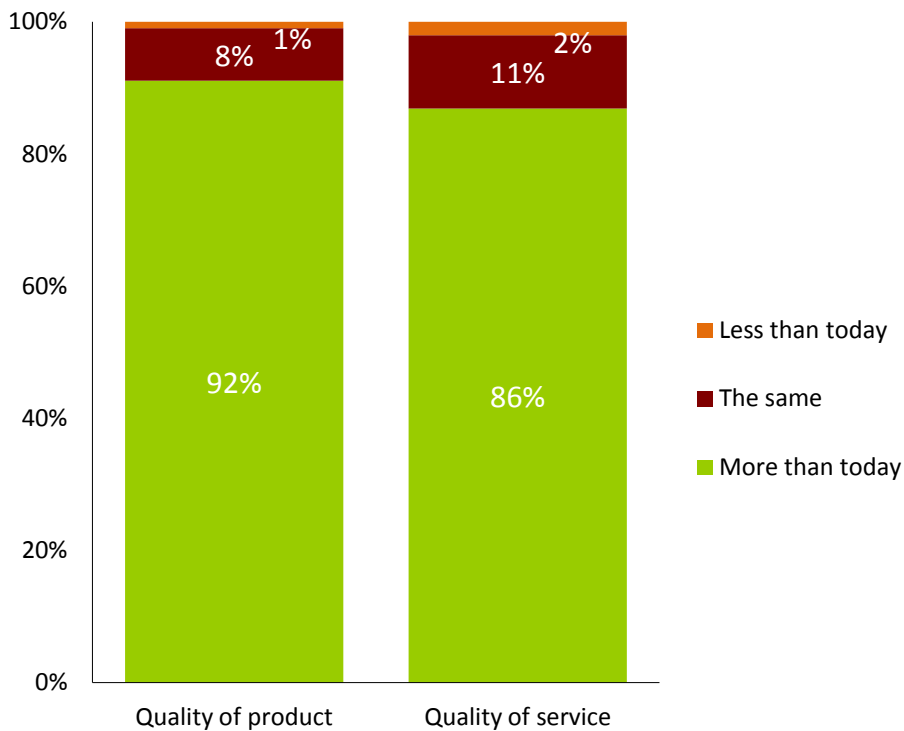
The importance of rising quality expectations

Consumer expectations when eating out are rising. They are looking for high quality in every aspect of their experience: food, service, atmosphere. With growing competition in the foodservice market and consumers placing far greater importance on eating out, operators will have to deliver on these quality expectations from consumers or risk losing them to competitors.

PRODUCE AND SERVICE QUALITY.

In each of the following aspects, rate whether they will increase/decrease/more or less important to consumers when eating out in 2020 compared with today.

Percentage of respondents



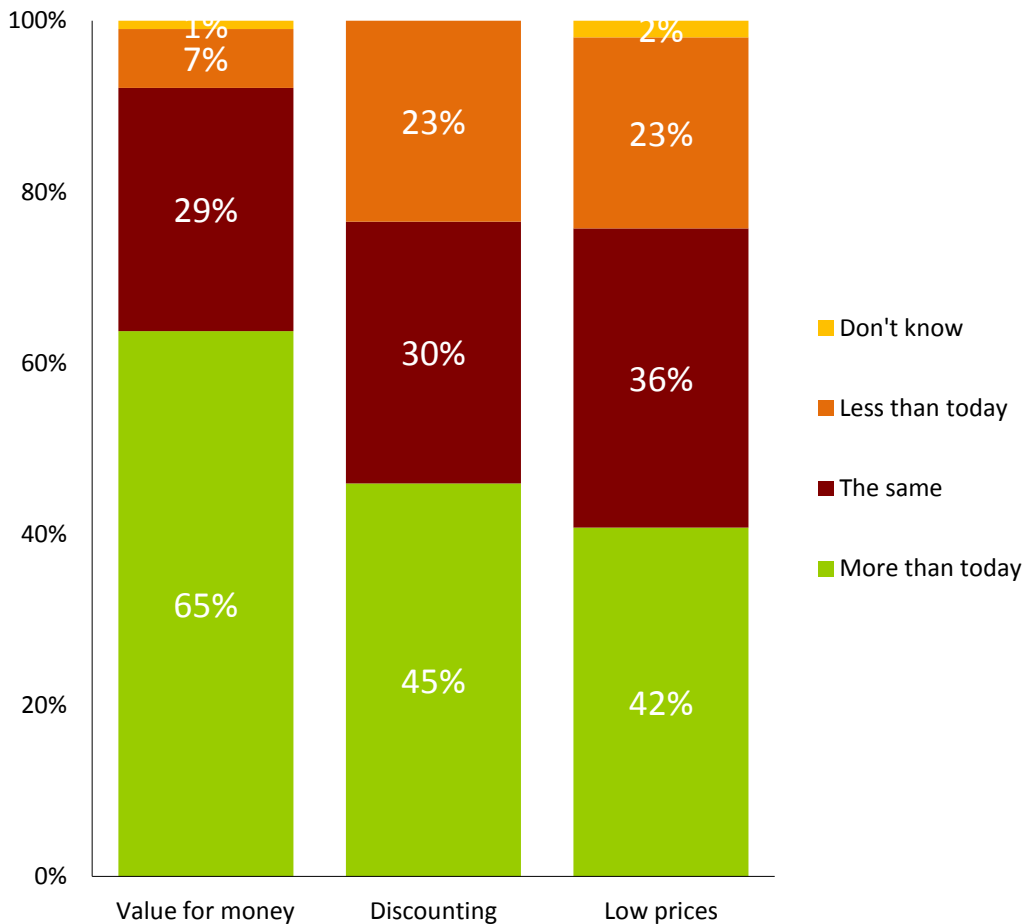
Value for money

A significant 65% of respondents think consumers will be more value conscious in 2020 than they are today. The economic downturn had a significant impact on consumer attitudes to spending and willingness to spend. An onslaught of discounting and vouchers in the foodservice sector led consumers to always expect money off their meal. A recessionary legacy is likely to exist with customers far more value conscious.

VALUE FOR MONEY AND DISCOUNTING.

For each of the following, rate whether they will increase/decrease/more or less important to consumers when eating out in 2020 compared with today.

Percentage of respondents



Source: Allegra Strategies industry research and analysis, 2013

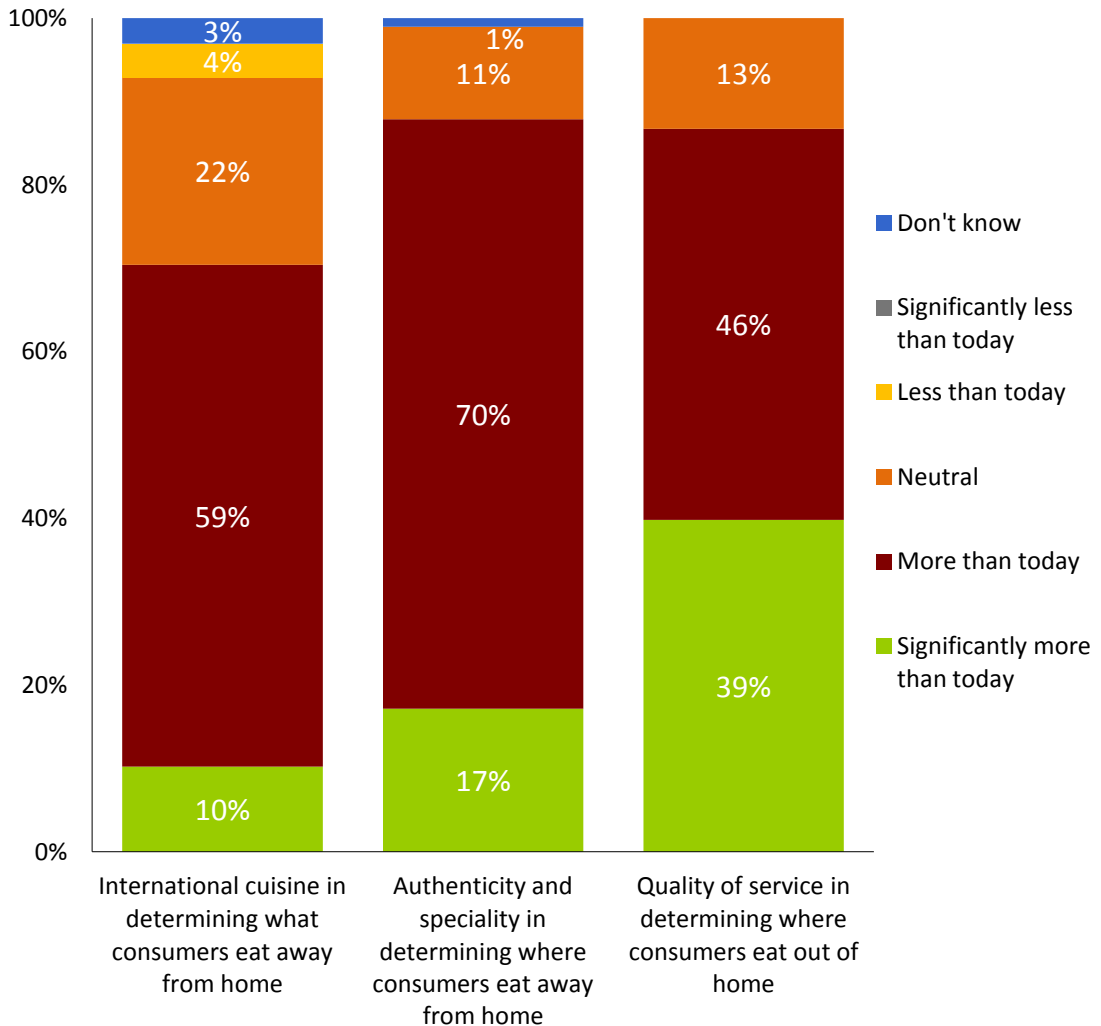
Determinants for eating out

Quality of service will be a key determinant for consumers in 2020 when determining where to eat out, with 39% of respondents saying that service quality will be significantly more important in 2020 than today. Authenticity will also be increasingly important to consumers as food quality and an authentic experience become a greater priority among the broad spectrum of cuisines on offer in the marketplace.

DETERMINANTS FOR EATING OUT.

For each of the following, rate whether they will increase/decrease/more or less important to consumers when eating out in 2020 compared with today.

Percentage of respondents



Source: Allegra Strategies industry research and analysis, 2013

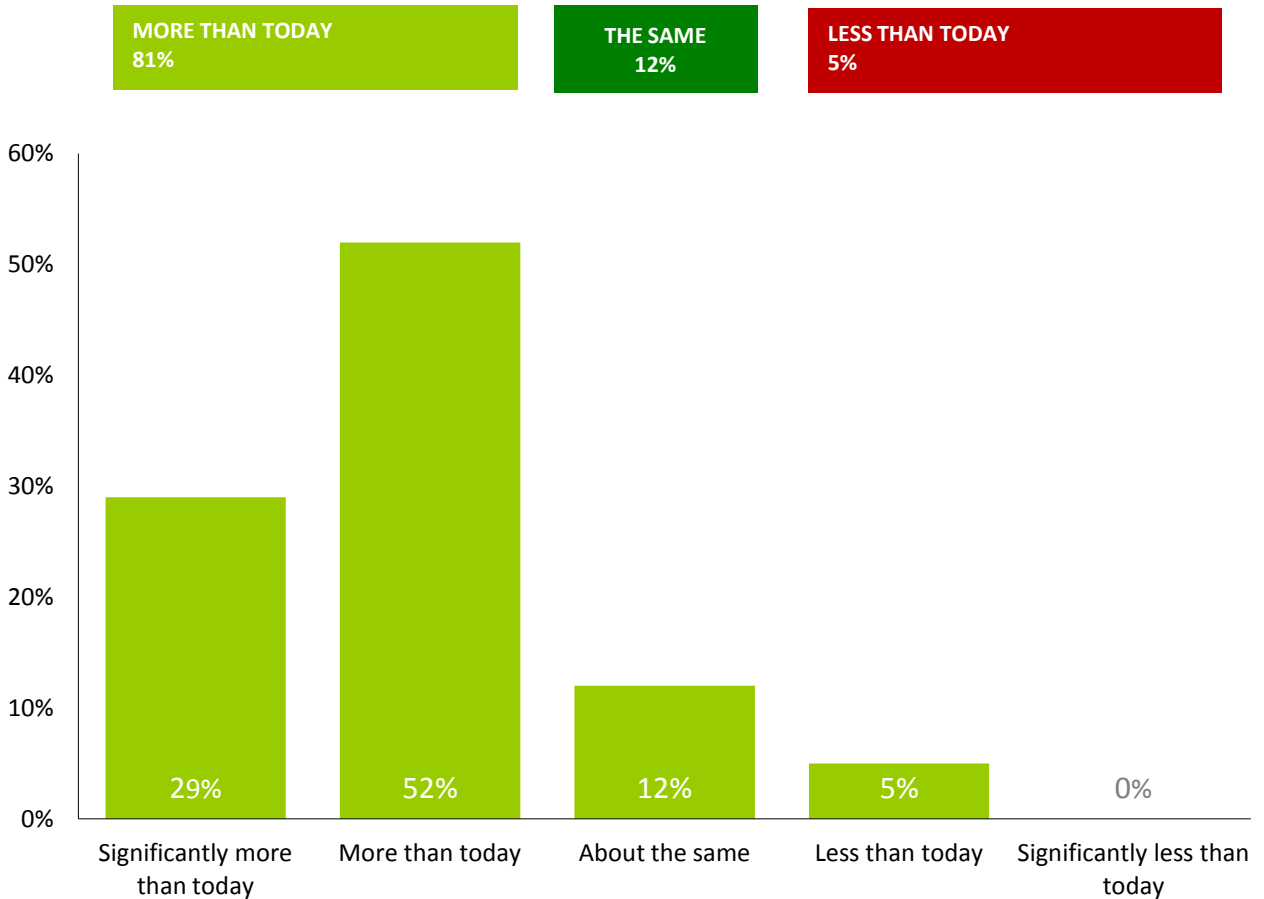
Social media

Social media is expected to become a more important influencer in determining where consumers eat out, with nearly 70% of respondents in agreement. Social media is exceptionally important for engaging customers and creating loyalty. It is a means by which operators can communicate directly with customers and create ‘personal’ relationships with them, which in turn makes customers feel more valued and increases their loyalty to the brand.

SOCIAL MEDIA IN DETERMINING WHERE CONSUMERS EAT OUT.

For each of the following, rate whether they will increase/decrease/more or less important to consumers when eating out in 2020 compared with today.

Percentage of respondents



Source: Allegra Strategies industry research and analysis, 2013

Factors impacting the F&B sector in 2020

Eating out frequency will increase by 2020, driven by busier lifestyles. Breakfast and lunch will be particularly important meal occasions for consumers looking for grab-and-go food solutions. Operators will need to respond to changing consumer eating out patterns, extending opening hours and creating more interesting and varied food options at these times. Customer service and atmosphere will also become more important factors for consumers when eating out.

*“The customer need for new and innovative concepts, which will keep them inspired, engaged and excited will grow. Generations of customers will become more aware of what’s out there, **more cosmopolitan and experimental** in their eating, encouraged and passively coached by media and the supermarkets.”*

Non-grocery retail

*“Convenience of location will always be key to ensure good footfall and I believe that growth in **OOH purchasing will be driven by breakfast and lunch** meal occasions, where location will be key. Habits learnt during the extended downturn are likely to be maintained, especially value for money and cost factors. I believe that consumers will control spend per occasion, whilst the number of purchase occasions will rise.”*

Delivered wholesaler

*“Strong and consistent management will drive a quality offer. **Social media** will be increasingly important in driving sales and loyalty.”*

Management consultant

*“Customers are likely to have **busier lives in 2020**, therefore **longer opening hours** will be important. Training will be needed to ensure effective management and innovative concepts, to provide **excellent customer service** and a reason for customers to return.”*

Business and industry foodservice

*“Good **location and atmosphere** coupled with **good quality** well priced food are the most important drivers to maintain customer loyalty and increased footfall.”*

Design consultant



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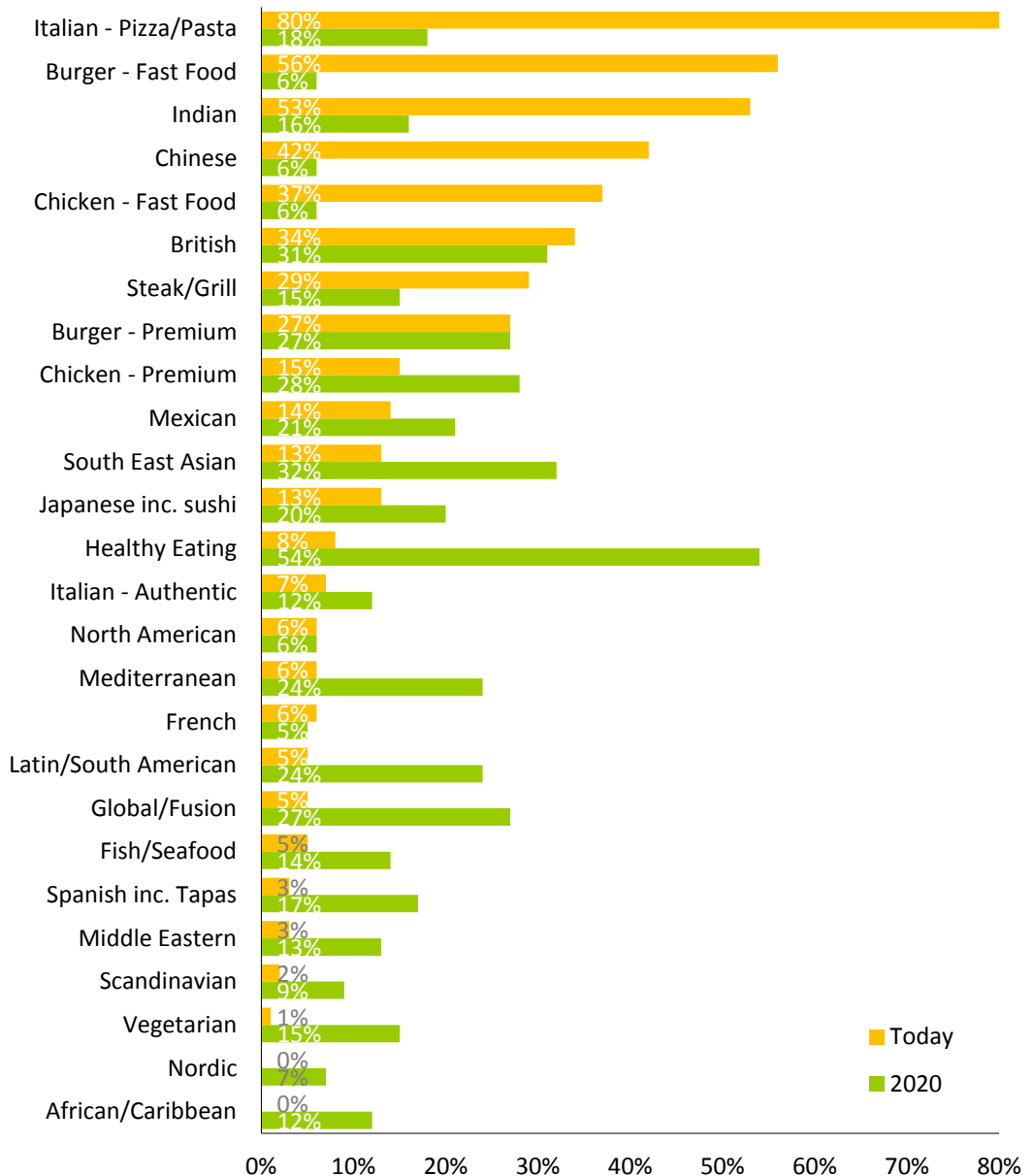
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Cuisine trends – today and in 2020

Respondents predict significant change in which cuisines will be popular in 2020 compared with today. Popular foods today such as pizza, pasta, burger, Indian and Chinese, will fall out of favour by 2020. Steak is anticipated to fall in popularity, while premium chicken will rise. Healthier eating is expected to rise most significantly and South East Asian is predicted to be the second most popular cuisine. Mediterranean, South American and Fusion food are also expected to be popular in 2020. As consumers become more experimental, they will always be on the look out to try something new.

Which types of cuisine within the eating out sector are most prevalent today and will be most prevalent in 2020?

Percentage of respondents



Source: Allegra Strategies industry research and analysis, 2013

What we'll be eating in 2020

Many food experts are looking at alternative sustainable sources of protein for the future, such as genetically modified food and insects. While this is a possibility in the future, it is unlikely that this is what mainstream diets will consist of by 2020. Certainly, there will be greater focus on healthier eating, plant-based diets and natural alternatives to sugar. Foodservice operators will also cater for more specialised and restrictive diets, such as Paleo or the 5:2 diet.

"New world cuisines and alternative proteins. Healthier foods with less fat and sugar."

Pub group/branded restaurant chain

"Genetic modified food chemical prepared food at good value (molecular mass production)."

FMCG

"More innovation from countries that they haven't necessarily visited. A focus on delicious but healthy foods."

Grocery retailer

"Alternative sources of protein to meat, seaweed etc."

Management consultant

"High protein food such as locusts, ants and other types of insects that are in abundance."

Equipment manufacturer/supplier

"Macrobiotic dishes, cholesterol reducing dishes, sustainable and line-caught fish dishes."

Equipment manufacturer/supplier

"Less meat, more fish and seafood."

Equipment manufacturer/supplier

"New types of protein including products currently thought to be unacceptable eg insects, GM meat. Also the whole issue of GM will have been resolved if it means lower prices."

Management consultant

"Nordic/Scandinavian focus on traditional British vegetarian will return as a trend; which will make restaurants more experimental with flavours and foods in the absence of meat."

Food manufacturer/supplier



"Alternative proteins, natural alternatives to sugar, more extreme restrictive eating trends eg paleo, 5:2 diet and foodservice outlets catering for these. Focus on 'good fats' in healthy eating circles rather than calorie counting."

Government services

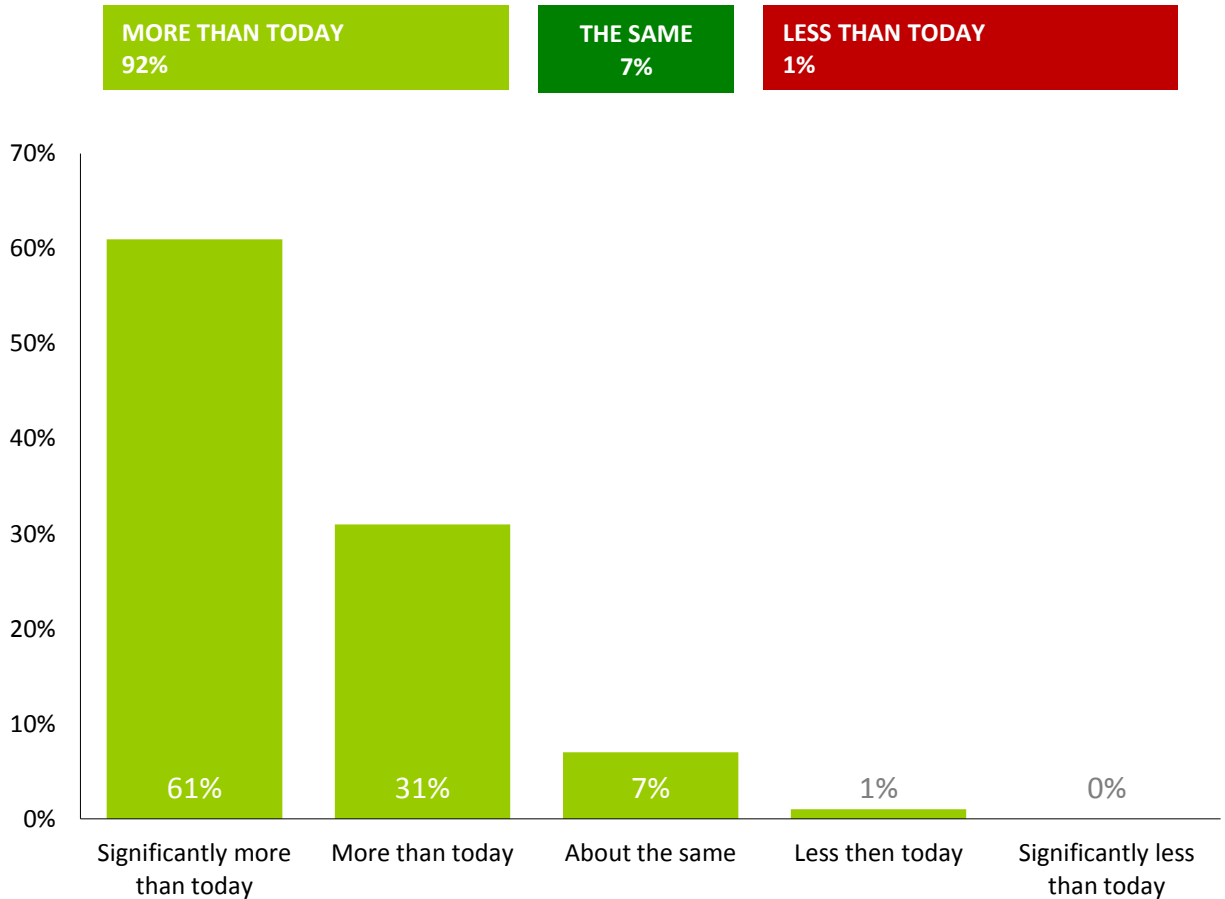
Increasing importance of healthier eating

92% of respondents claim that healthier eating will increase in importance to customers when eating out by 2020. The concept of diets will disappear, with consumers adopting healthier living as a lifestyle choice. Variety will be key, with operators offering an array of options for consumers to choose what best suits them.

HEALTHIER EATING.

Rate whether healthier eating will increase/decrease/more or less important to consumers when eating out in 2020 compared with today.

Percentage of respondents



Source: Allegra Strategies industry research and analysis, 2013

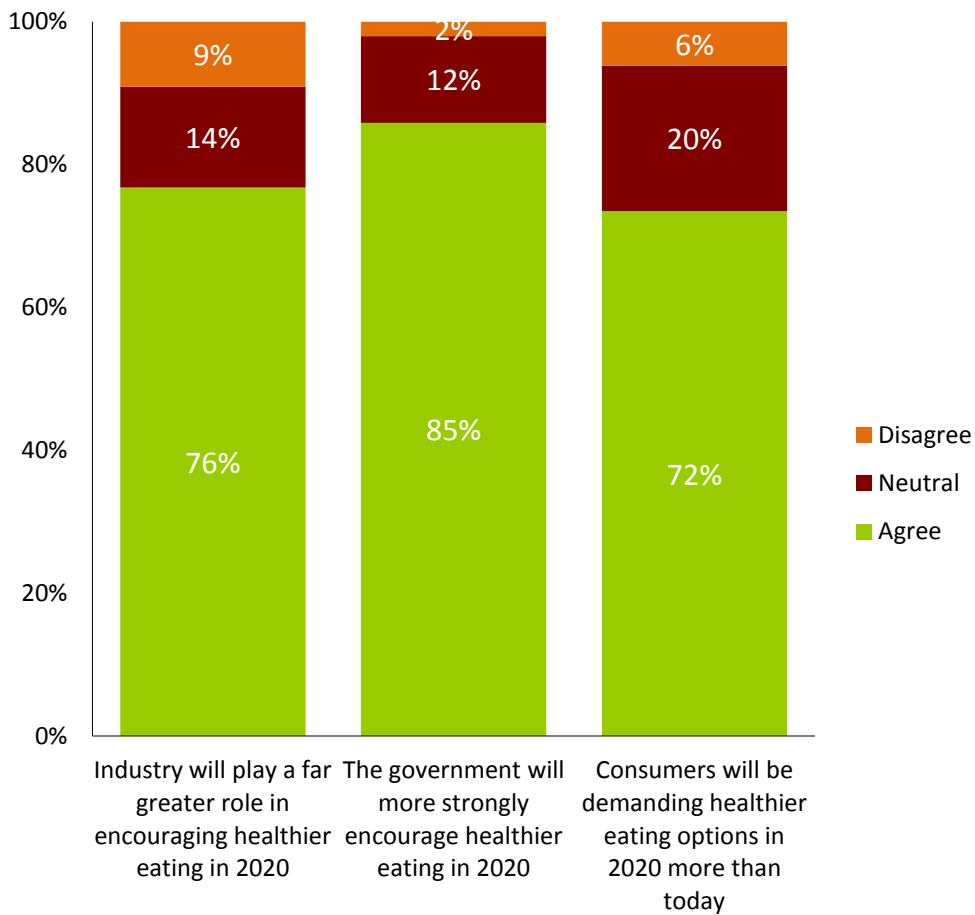
Key influences on healthier eating

The foodservice industry, the Government and consumers are all expected to play a far greater role in healthier eating by 2020. The Government is expected to have the most significant role to play, with 85% of respondents in agreement. With the UK population ageing, healthier eating will become a more important Government initiative to keep people fit and well, and reduce strain on the National Health Service.

HEALTHIER EATING DRIVERS.

How much do you agree or disagree with the following statements.

Percentage of respondents



Source: Allegra Strategies industry research and analysis, 2013

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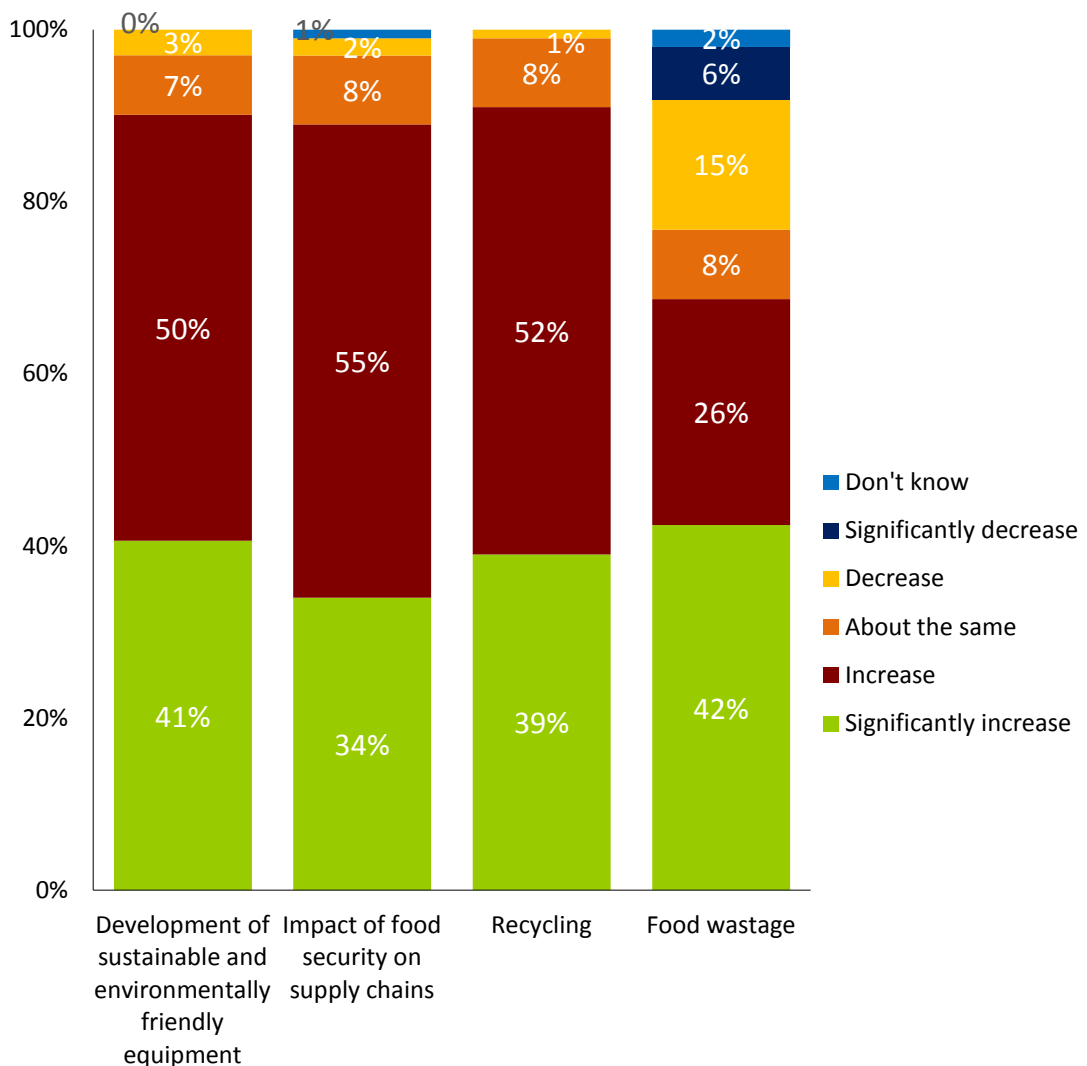
Ethical initiatives

Most respondents agree that ethical initiatives will become more important to consumers by 2020. Recycling, food security and sustainable equipment are all expected to be more important issues by 2020.

ETHICAL INITIATIVES.

For each of the following, rate whether they will increase/decrease/more or less important to consumers when eating out in 2020 compared with today.

Percentage of respondents



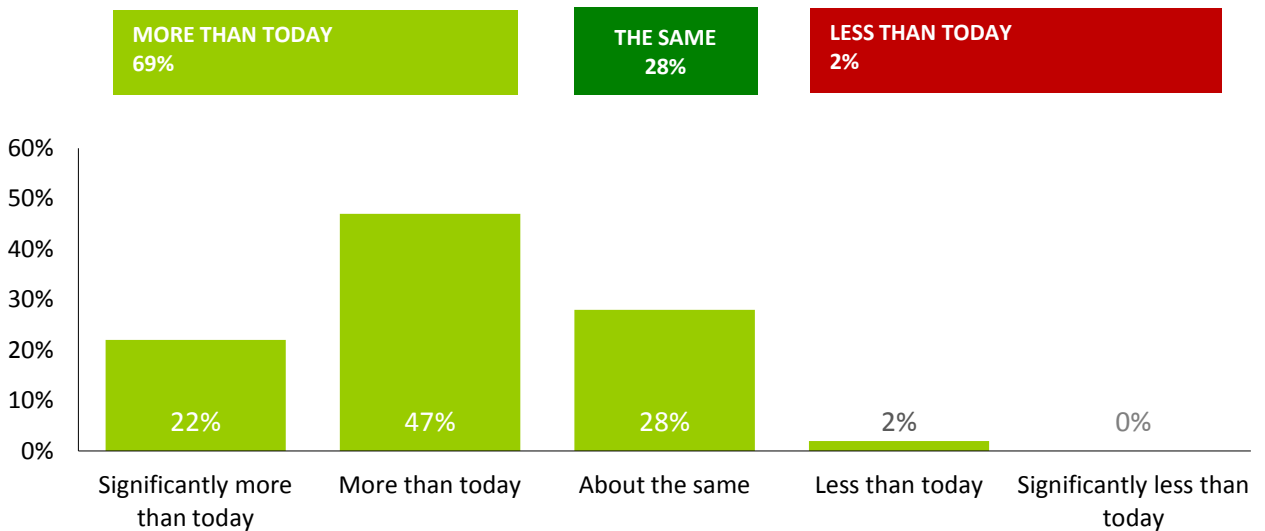
Source: Allegra Strategies industry research and analysis, 2013

British and local sourcing

69% of respondents agree that British sourcing will become more important in determining where consumers eat away from home. British and local sourcing are important to consumers for two main reasons: 1) Consumers can support their local businesses and communities and 2) there is greater security around authenticity and quality when the food is locally sourced. British sourcing is considered marginally more important than local sourcing which suggests British products will be sufficient in a market where wider global influences will emerge.

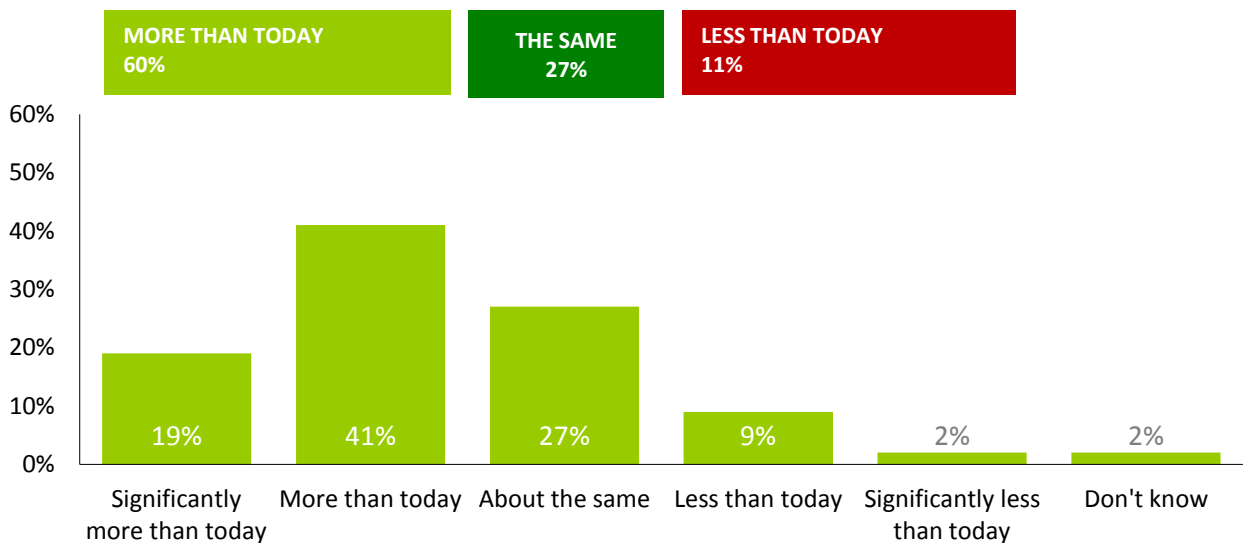
BRITISH SOURCING IN DETERMINING WHERE CONSUMERS EAT AWAY FROM HOME.

Percentage of respondents



CONSUMERS WILL BE DEMANDING LOCAL SOURCING IN 2020 MORE THAN TODAY.

Percentage of respondents



Source: Allegra Strategies industry research and analysis, 2013

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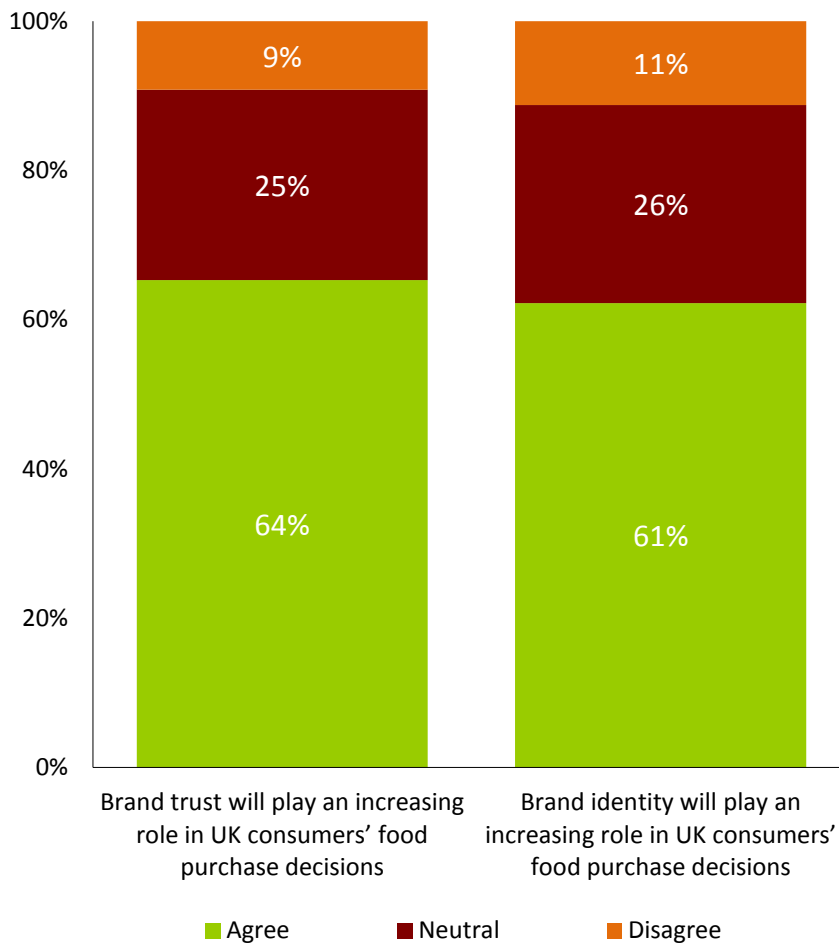
Millennials' perspective of the future

Importance of brand identity and trust

Almost two thirds of respondents agree that brands will play an important role in UK consumers’ food purchase decisions. Consumers rely on known brands when seeking value and quality assurance and consumers will continue to seek both these facets in 2020.

IMPORTANCE OF BRAND TRUST AND BRAND IDENTITY.

Percentage of respondents



Source: Allegra Strategies industry research and analysis, 2013

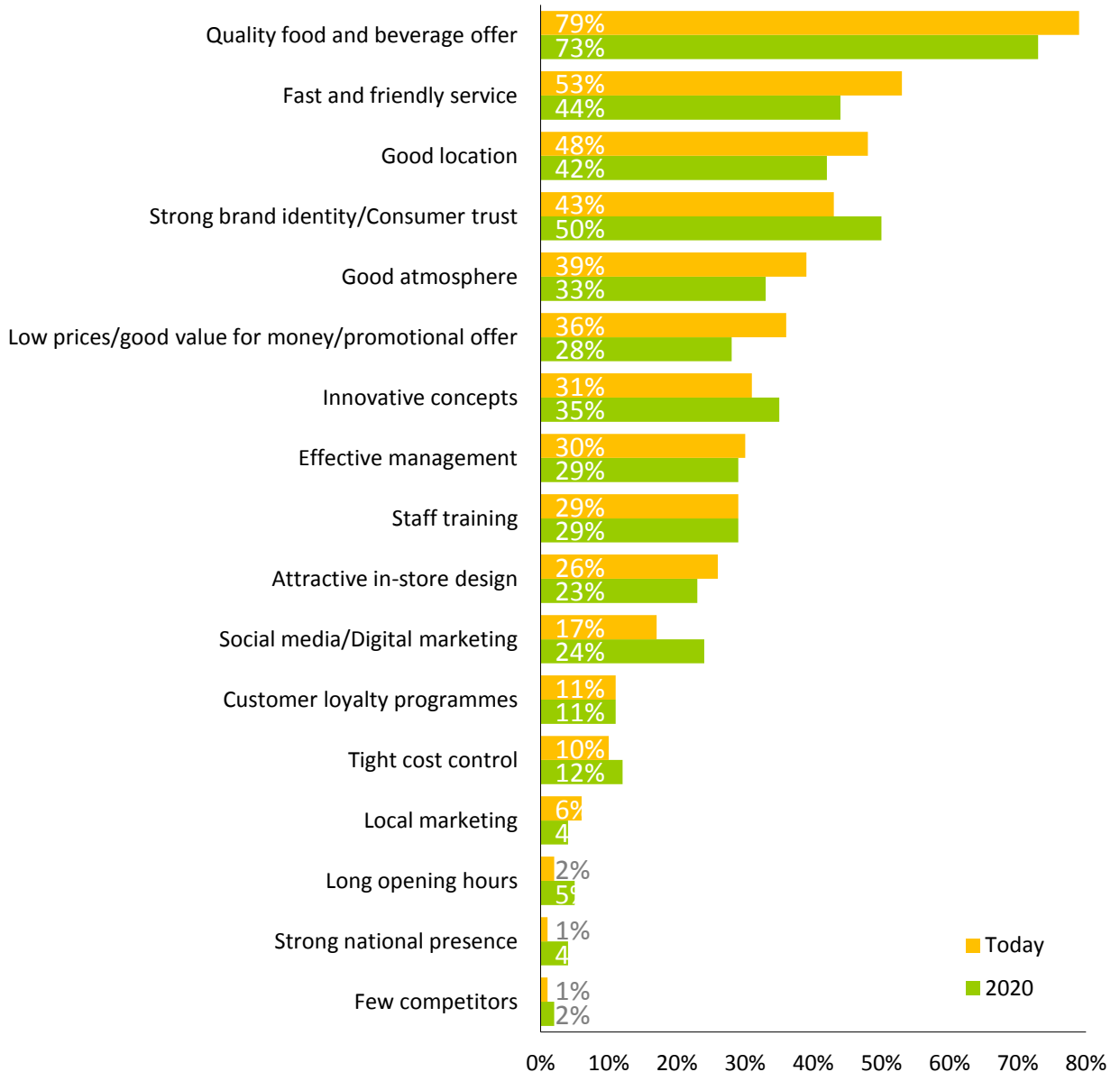
Success factors of a food and beverage operator

A high quality food and beverage offer will be key in 2020 as consumer expectations for quality rise. A strong brand identity will also be critical in 2020 as competition grows and winning over consumers becomes harder. At the same time, consumers will be after innovation and will be attracted by experimental and boundary-pushing concepts. These will offer a set of significant challenges for operators in 2020: being customer savvy and staying ahead of the competition will be critical for success.

KEY F&B OPERATOR SUCCESS FACTORS.

In your view, which factors have the greatest positive impact on the success of a food and beverage operator today and in 2020?

Percentage of Respondents



Source: Allegra Strategies industry research and analysis, 2013

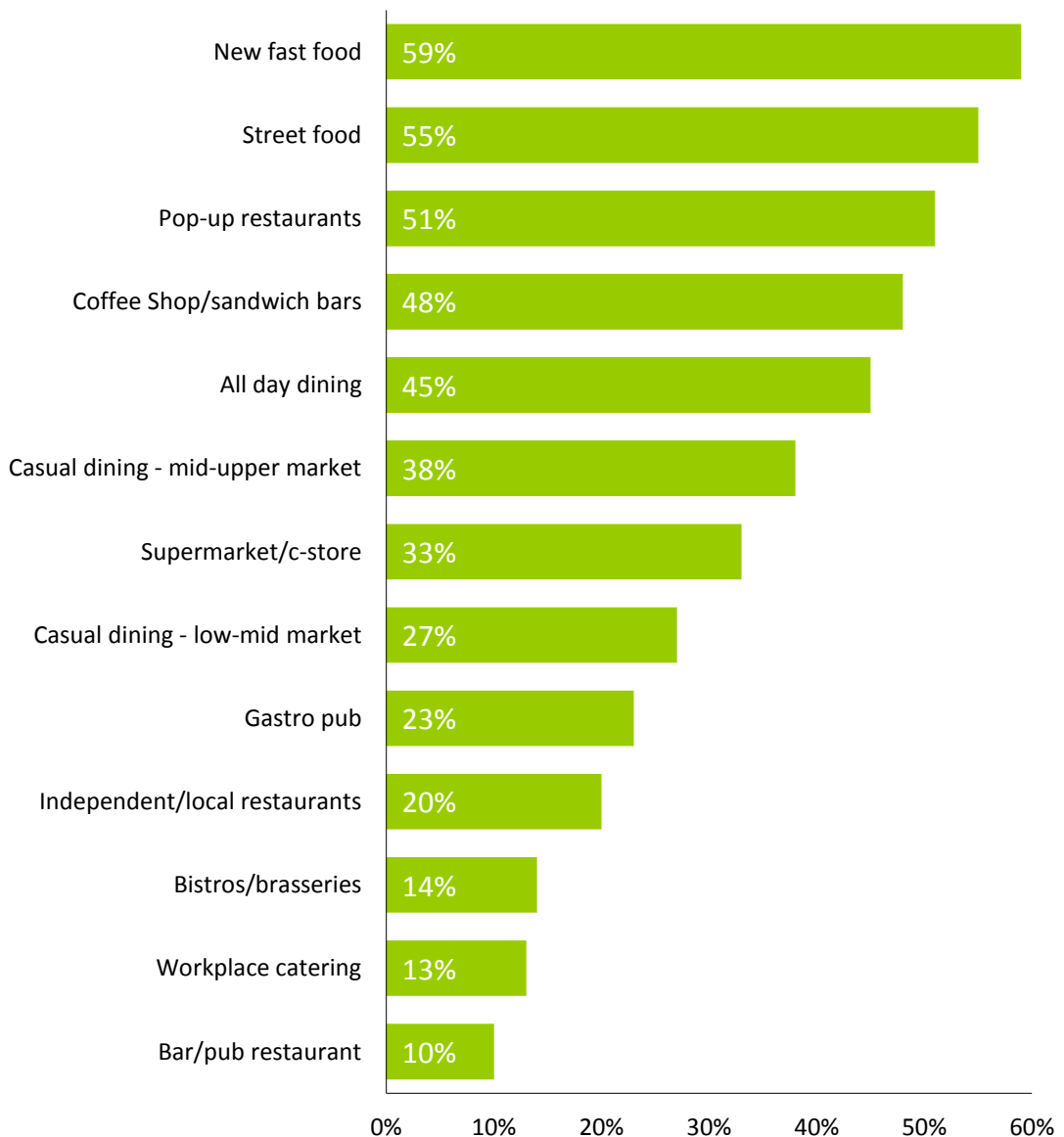
Fastest growing business types

The food and beverage business types set to grow fastest by 2020 are those that will deliver interesting concepts with exciting food: new fast food, street food and pop-up restaurants are expected to be the fastest growing business types. These business models share one other common attribute: speed. Consumers are able to eat quickly at these establishments. With a greater focus on breakfast and lunch time occasions and with eating out a more regular occurrence, a fast eating experience will be what consumers are seeking in 2020.

FASTEST GROWING BUSINESS TYPES.

Which food and beverage business types do you see growing the fastest by 2020?

Percentage of respondents



Source: Allegra Strategies industry research and analysis, 2013

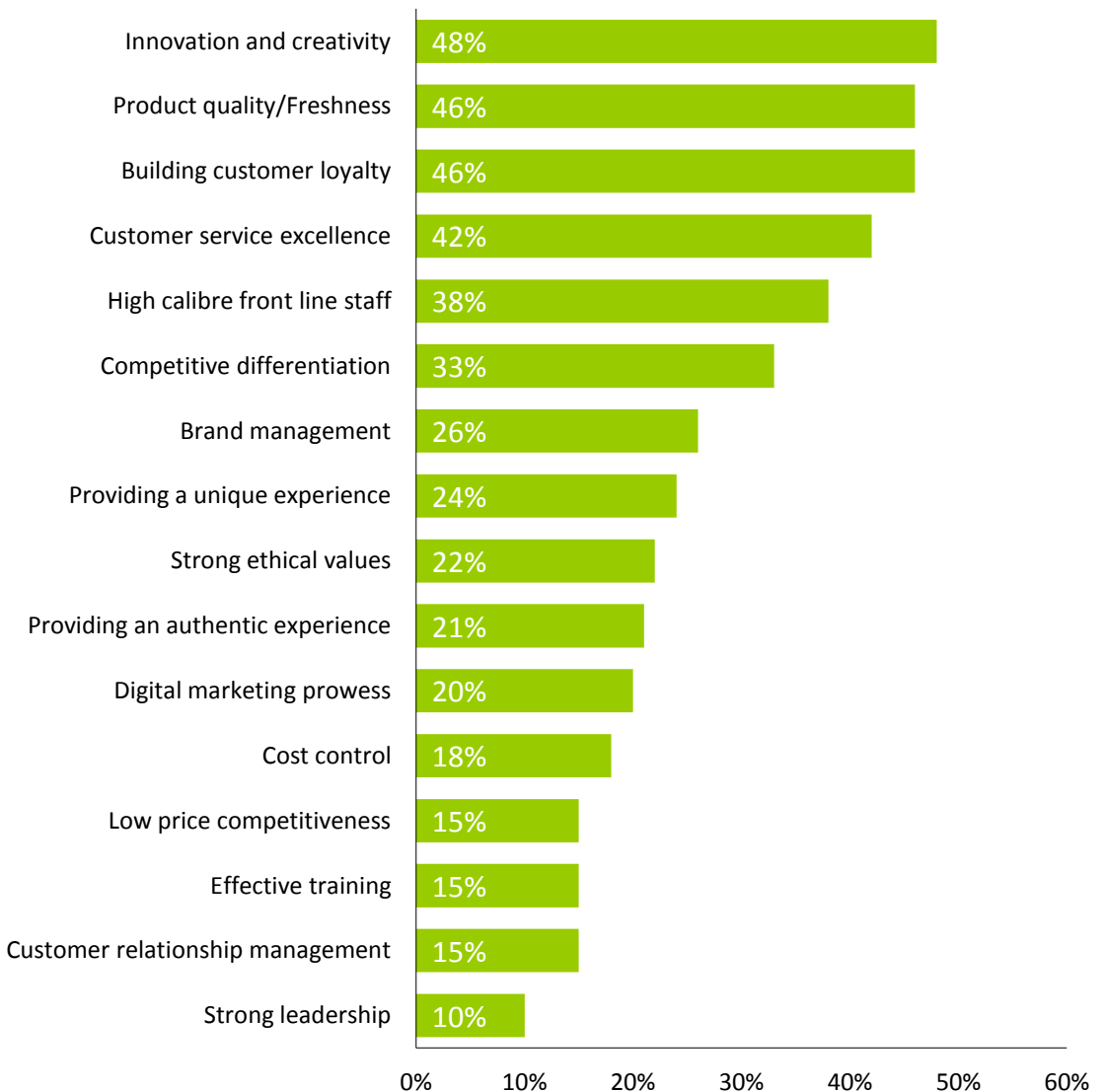
Corporate competencies in 2020

Innovation and creativity, product quality and customer loyalty are the most important corporate competencies for foodservice operators in 2020. With increased frequency of eating out, consumers will be more engaged and interested in food and they will expect the market to be filled with a plethora of interesting foodie concepts for them to try. Quality will be key for operators as consumers anticipate the best quality wherever they go, even at transaction spend establishments.

CORPORATE COMPETENCIES IN 2020.

The most successful foodservice operators in 2020 will have demonstrated outstanding capability in which of the following corporate competencies?

Percentage of respondents



Source: Allegra Strategies industry research and analysis, 2013

Industry perspectives – Corporate competencies in 2020

A tight brand proposition will be critical as brands grow and competition increases. Stronger competition will also mean innovation and creativity become extremely important to deliver a unique offer and excite customers. The entire dining experience will be elevated, with exceptional quality, authenticity and very high calibre frontline staff.

*“**Product freshness and provenance** linked with **innovation and creativity** will ensure we see these emerging concepts come to the fore. Economies of scale will always play a major lead in which companies develop their core competences and capabilities.”*

Equipment manufacturer/supplier

*“**Transparency and authenticity** will become increasingly important, and with that comes the need for greater simplicity as consumers expect to see the detail but still know exactly what the proposition is. So you need great leadership around a very **tight brand proposition with high calibre frontline staff** to convincingly deliver the brand in the way in which it was designed centrally.”*

Branded chain

*“Great brands sell and attract customers, this linked with **high quality front of house staff** that have been training well in customer service will thrive.”*

Equipment manufacturer/supplier

*“Consumer choice is high already, and the marketplace will become even more **competitive**, so having a **unique offer** that delivers consistent **value for money** experience and appeals to its target consumer will benefit from customer loyalty.”*

Delivered wholesaler

“Customers will look for places where they can have an intelligent conversation with staff, not just where they are being served by people repeating the same sentence to every single customer.”

Coffee shop/sandwich chain operator

*“Digital **social media** will be the leading way in which we access customers. Proving a point of difference will drive footfall.”*

Contract caterer

*“Restaurant groups will continue to grow – there are likely to be more that come over from the US and there will be **fads for exotic casual dining experiences**. **Brand management** will therefore continue to be very important. Customers will require strong **ethical and sustainability credentials** from these operators more and more. As a result of their economies of scale, in order to be successful, they will need to be able to control their costs.”*

Management consultant



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Millennials' perspective of the future

In order to provide a different perspective on what the future might look like in 2020, the FCSI invited students from University of West London, along with a young consultant from Panache Consultancy, to provide their ideas, concerns and questions about what the future holds.

The following contributed their thoughts:

Ben Galvin – student at the UWL

Maxine Bianco – student at the UWL

Charlotte French – Project Consultant at Panache Consultancy



Maxine Bianco, student at University of West London comments:

“Sustainability is a growing concern for the future of foodservice. While I feel that hospitality businesses are heading in the right direction and are becoming more sustainable, we still face a major challenge of worldwide food shortages.

There is also a bigger battle to consider: educating the future. Schools should be focusing on wider education; helping pupils to understand what will happen if changes are not made. For example, if we don't cut down on waste we will have a problem as UK landfills are at capacity!

In my opinion, if the Government doesn't seriously address these issues, by 2020 we'll probably be back where we started, still having the same discussions rather than looking at new solutions. Earlier generations have created the problems that will be catastrophic in my grandchildren's time unless my generation finds sustainable solutions. The responsibility on our shoulders is heavy and we are beyond the point of just talking about it. We need solutions now.”



Millennials' perspective of the future

Fellow University of West London student Ben Galvin comments:

"The ways in which foodservice is being affected has changed dramatically over the last 10 years and is continuing to do so due to social changes, sustainability issues and political factors. By 2020 there will need to be huge changes by the hospitality industry in order to address these issues.

In recent years, a lot of businesses have been striving to become more sustainable – motivated by saving the environment, but also by saving money. As Taste of the Future 2012 mentioned: "Consumers are looking for the 'feel good' factor that comes from buying sustainable products", so being environmentally friendly has become a marketing tool to gain competitive edge. There's nothing wrong with this. However, as oil, water and food shortages increasingly start to bite, running a sustainable business will determine whether a business survives.

There are many organisations that "stamp" businesses with an environmentally friendly certification like the Green Seal

46 (US) and Fair Trade. Could it be that certifications like these could become a necessity for businesses to operate legally, on the same level as Health and Safety Executive (HSE) certification, for example?

Another factor contributing towards change in the food industry is the ageing population. In just over 10 years, a third of the population will be over 50. The hospitality industry has a reputation of neglecting the older segment of the population, so in 2020, when the majority of the population will be between 50-64, this could prove to be a threat to a lot of hospitality business. Foodservice may need to look towards providing tailored products or services for this ageing population and overcome a potential skills shortage, with less people available to work in the industry."



Millennials' perspective on the future



Charlotte French, project consultant at Panache Consultancy comments:

“The foodservice industry is by its very nature dynamic; overcoming challenges and battling new ones. Taking a global view and taking responsibility at this level is becoming more of a heated topic across the industry as the pressure to help sustain the health of the environment and the population worldwide grows.

By 2020, I expect the hospitality industry to be following strict sustainability practices and having even tighter controls in place to ensure organisations deliver against these. For example, adding Marine Stewardship Council (MSC) sustainable fish to more University menus.

What surprises me, is that despite sustainability being on the agenda as an issue for decades, it is evident that many caterers are still not grasping “the sustainability nettle”. Generally the younger generation is the most passionate and proactive about environmental issues; after all, recycling, waste management, local sourcing and energy

reduction are just a few areas that we know we need to change to help our children and grandchildren to survive.

It is just as important to educate the general public on issues that will also have a significant impact on their lives, for example – healthy eating and the ageing population. The fact that more than “50% of adults in the UK could be obese by 2050” is alarming, and we should help future generations to stop this from becoming a reality.

Clearly, there is a lot to do now and what will happen in the future when it comes to foodservice is difficult to predict. I think many people would agree that now is the time to make the changes and be brave enough to invest in solutions that we know will make a difference to the future of the foodservice industry and to the world's population both now and in years to come.”



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