

Report Price: £1750.00 | \$2834.04 | €2223.04

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.



"Market conditions remain tough with consumers' ongoing price sensitivity in this sector continuing to exert pressure on operators' margins. Operators therefore should remain focused on menu innovation trends in order to trigger consumers' 'want to buy' mentality."

— Helena Childe, Senior Foodservice Analyst

This report looks at the following areas:

- Proactively demonstrating value-for-money cues could help caterers win market share
- · Caterers that communicate their product range more regularly could reap rewards
- · Tapping into consumers' 'want to buy' mentality through menu innovation

The contract catering industry is expecting some improved market conditions in 2014 due to factors such as the economic recovery in the UK and improvement in employment figures. Sectors such as state education should also benefit from the advent of Universal Infant Free School Meals in September 2014. However, public cuts and budget freezes in other areas continue to intensify market conditions.

BUY THIS REPORT NOW

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533

> Brazil 0800 095 9094

+1 (312) 943 5250

+61 (0) 2 8284 8100

EMAIL: reports@mintel.com

DID YOU KNOW?

This report is part of a series of reports, produced to provide you with a more holistic view of this market



Report Price: £1750.00 | \$2834.04 | €2223.04

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Table of Contents

Introduction

Definition

Abbreviations

Executive Summary

The market

Figure 1: UK contract catering market size, 2009-19

Market factors

Market environment by segment

Market drivers

Companies, brands and innovation

Who's innovating?

The consumer

Who eats school meals?

Figure 2: Child's lunch during the week in term time, July 2014

Parents' attitudes towards school meals

Figure 3: Parents' attitudes towards school meals, July 2014

Interest in products/services at school canteens

Figure 4: Interest in products/services at school canteens, July 2014

School meal enticements

Figure 5: School meal enticements, July 2014

What we think

Issues and Insights

Proactively demonstrating value-for-money cues could help caterers win market share

The facts

The implications

Caterers that communicate their product range more regularly could reap rewards

The facts

The implications

Tapping into consumers' 'want to buy' mentality through menu innovation

The facts

The implications

Trend Application

Lunch monitors

Fun food

Global appeal

Market Drivers



VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094 Americas +1 (312) 943 5250 | APAC +61 (0) 2 8284 8100



Report Price: £1750.00 | \$2834.04 | €2223.04

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Key points

The UK economic recovery

Population trends

Figure 6: Trends in the age structure of the UK population, 2009-19

Governmental budget concerns

New contracting model

New allergen labelling rules

Sustainability initiatives

Central government commits to buying local produce

The Food for Life Catering Mark

Who's Innovating?

Key points

Healthy eating

Street food

Technological advancements

Pre-ordering and online payments for school meals

Flexible catering for flexible working

Loyalty scheme apps

Market Size and Forecast

Key points

Market performance

Figure 7: UK contract catering market size, 2009-19

Figure 8: UK contract catering market size, 2009-19

Forecast methodology

Market Environment by Segment

Key points

Business & Industry (B&I)

Figure 9: Employment and unemployment, by gender, 2009-19

Figure 10: Seasonally adjusted unemployment rate, Q1 2009-Q2 2014

Schools

Figure 11: Trends in school numbers and numbers of pupils in England, 2003-14

Healthcare

NHS spending fails to keep pace with inflation

BMA predicts NHS costs to rise ahead of inflation

Number of beds falling, food spend per patient rises

Figure 12: Average daily available beds open overnight, by sector, England, Q1 2010/11-Q1 2014/15

Figure 13: Selected NHS associated costs, 2009/10-2012/13

New recommendations for hospital food announced in 2014



VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094



Report Price: £1750.00 | \$2834.04 | €2223.04

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Meals in the wider healthcare context

Prisons

Figure 14: Population in prison establishments in England and Wales, June 2010-June 2014

Figure 15: Projected prison population (end of June figures), June 2014-June 2019

Defence

Figure 16: Trends in the strength of regular UK Armed Forces personnel, 2006-14

The Daily Food Charge

Companies and Products

Key points

Aramark

Financial information

Figure 17: Financial performance of Aramark UK Ltd, 2011-13

Recent developments

Bartlett Mitchell

Financial information

Recent developments

BaxterStorey

Financial information

Figure 18: Financial performance of BaxterStorey, 2011-13

Recent developments

Compass Group

Financial information

Figure 19: Financial performance of Compass Group Plc, 2011-13

Recent developments

Elior

Financial information

Figure 20: Financial performance of Elior UK plc, 2011-13

Recent developments

Harrison Catering

Financial information

Recent developments

ocs

Financial information

Figure 21: Financial performance of OCS Group UK Limited, 2011-13

Recent developments

Sodexo

Financial information

Figure 22: Financial performance of Sodexo Limited, 2011-13

Recent developments



VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094 Americas +1 (312) 943 5250 | APAC +61 (0) 2 8284 8100



Report Price: £1750.00 | \$2834.04 | €2223.04

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Other company developments

School Meals

Key points

Trends in take-up of school meals

Figure 23: Take-up of school lunches in England, 2010/11 and 2011/12

Figure 24: Take-up of school meals in primary* and secondary schools in England, by region, for LAs reporting take-up in 2010/11 and 2011/12

New school food standards

The School Food Plan

London schools and healthy eating initiatives

Drawing on expertise from the foodservice arena

Universal Infant Free School Meals (UIFSM)

The Consumer - Who Eats School Meals?

Key points

Who eats school meals?

Figure 25: Child's lunch during the week in term time, July 2014

Who eats packed lunches?

Figure 26: Child's lunch during the week in term tine, by age of youngest school-aged child, July 2014

The Consumer - Parents' Attitudes Towards School Meals

Key points

More than a third of parents say school lunches are an important part of their child's overall diet

Figure 27: Parents' attitudes towards school meals, July 2014

Criticisms of school meals

The demanding end consumer

The Consumer – Interest in Products/Services at School Canteens

Key points

Parents are seeking tools to help their children make better food choices

Figure 28: Interest in products/services at school canteens, July 2014

Interaction to drive interest

A role for edutainment

V is for variety

Greater range of hot meals

Grab and go options

The Consumer – School Meal Enticements

Key points

Nearly a third of parents would like greater participation in school meal menu development

Figure 29: School meal enticements, July 2014

Monitoring

Transparency

BUY THIS REPORT NOW VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094



Report Price: £1750.00 | \$2834.04 | €2223.04

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Parental control

Appendix - Market Size and Forecast

Figure 30: Best- and worst-case forecasts for the contract catering market, 20014-19

Appendix - The Consumer - Age of Youngest School-aged Child

- Figure 31: Age of youngest school-aged child, July 2014
- Figure 32: Age of youngest school-aged child, by demographics, July 2014
- Figure 33: Parents' attitudes towards school meals, by age of youngest school-aged child, July 2014
- Figure 34: School meal enticements, by age of youngest school-aged child, July 2014

Appendix - The Consumer - Who Eats School Meals?

- Figure 35: Child's lunch during the week in term time, July 2014
- Figure 36: Child's lunch during the week in term time, by demographics, July 2014
- Figure 37: Child's lunch during the week in term time, by age of youngest school-aged child, July 2014
- Figure 38: Parents' attitudes towards school meals, by child's lunch during the week in term time, July 2014
- Figure 39: Interest in products/services at school canteens, by child's lunch during the week in term time, July 2014
- Figure 40: School meal enticements, by child's lunch during the week in term time, July 2014

Appendix - The Consumer - Parents' Attitudes Towards School Meals

- Figure 41: Parents attitudes towards school meals, July 2014
- Figure 42: Most popular attitudes towards school meals among parents, by demographics, July 2014
- Figure 43: Next most popular attitudes towards school meals among parents, by demographics, July 2014
- Figure 44: Parents' attitudes towards school meals, by parents' attitudes towards school meals, July 2014
- Figure 45: Interest in products/services at school canteens, by parents' attitudes towards school meals, July 2014
- Figure 46: School meal enticements, by parents' attitudes towards school meals, July 2014

Appendix – The Consumer – Interest in Products/Services at School Canteens

- Figure 47: Products/services parents are interested in at school canteens, July 2014
- Figure 48: Most popular products/services parents are interested in at school canteens, by demographics, July 2014
- Figure 49: Next most popular products/services parents are interested in at school canteens, by demographics, July 2014
- Figure 50: Interest in products/services at school canteens, by most popular products/services parents are interested in at school canteens, July 2014
 Figure 51: Interest in products/services at school canteens, by next most popular products/services parents are interested in at school
- Figure 52: School meal enticements, by most popular products/services parents are interested in at school canteens, July 2014
- Figure 53: School meal enticements, by next most popular products/services parents are interested in at school canteens, July 2014

Appendix – The Consumer – School Meal Enticements

- Figure 54: School meal enticements, July 2014
- Figure 55: Most popular school meal enticements, by demographics, July 2014
- Figure 56: Next most popular school meal enticements, by demographics, July 2014
- Figure 57: School meal enticements, by most popular school meal enticements, July 2014
- Figure 58: School meal enticements, by next most popular school meal enticements, July 2014
- Figure 59: Interest in products/services at school canteens, by most popular school meal enticements, July 2014

BUY THIS REPORT NOW



Report Price: £1750.00 | \$2834.04 | €2223.04

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Figure 60: Interest in products/services at school canteens, by next most popular school meal enticements, July 2014

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094 Americas +1 (312) 943 5250 | APAC +61 (0) 2 8284 8100