

WEEKLY BRIEFING REPORT

Week ending 1 October 2023

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**Peter
Backman.**





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My insight

Summer is over and it is the season for trade shows – ahead of the Christmas season which I see from displays in some of my local shops is almost upon us.

But back to trade shows. I was at Excel last week to give my keynote presentation at the Lunch! Show on the topic of Delivering Lunch (and if you would like to have a copy of my presentation, please [email me](#)) and I was also delighted to have been asked by Uber Eats to chair a lively panel of successful operators from the restaurant sector – we had a great discussion on the subject of Delivery in Casual Dining.

Our discussion reminded how far we have come from the days when our world was limited by covid. The energy is back – even though current conditions are fairly depressing, and the outlook is fairly grim. But enough of that for now because I want to comment on two separate things at the show.

There were the people, doing what people in the world of foodservice and hospitality do best – being open, gregarious, and generous. Those characteristics are always alive in the foodservice sector and help it get through the toughest of times and arrive, on the other side, ready for further challenges.

The other thing I noticed at the shows was, in fact, something that wasn't there – or was only a shadow of its former self. Last year the shows were all about 'plant based' – saving the planet one bean at a time. This year, the messages were far more confused – I saw lots of packaged products, and lots of well branded products from small, niche suppliers. Out of them will spring the challenger brands of tomorrow, and the successes of the day after that (if you'll allow me to compress time significantly).

But plant-based? Apart from a handful of major suppliers there was hardly a sign. Does this mean plant-based as a category is no more? I don't think so. The demand, from restaurant customers, for vegetarian (or vegan) food still exists and will, in my opinion, undoubtedly continue to do so. But the large numbers of suppliers last year were a sign that too many companies had piled in. There was too much competition and insufficient demand.

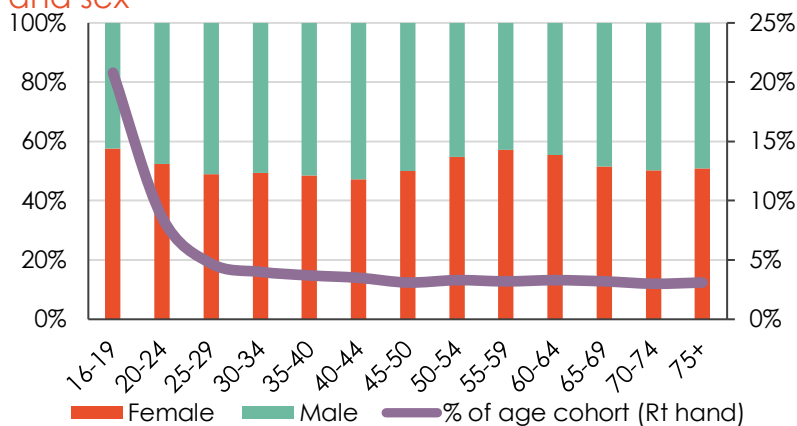
Consequently, companies have fallen by the wayside and those that remain are husbanding their resources – including expenditure on marketing. And that, I believe explains why they were noticeable by their absence at last week's shows.

The numbers

People are what make the foodservice sector work. Without people there can be no service, and without service, there can be no foodservice. People are not replaceable with machines. Of course, that's not quite true – machines do some, or even a lot, of the work that people used to do - chopping, mixing and so on - and vending machines replace people in some front of house food to go locations; and maybe robots will replace even more people in time to come. But ultimately people are essential for the world of foodservice to work.

Foodservice is not unique in this of course, people are integral to other sectors of the economy too – just think of education or the arts. But given the centrality of people in the operations of foodservice, it's necessary to understand what we're working with. The ONS has just published data, as of early 2021, about the people who work in 'food and beverage service activities' - I'll call this 'foodservice' from here on.

Foodservice working population by age and sex



Sources: ONS; Peter Backman

About 1.2 million people work in foodservice, half of them are under the age of 35, and they represent about 4.5% of the total working population. Just over half (52%) are female.

They start working at the age of 16. Indeed, foodservice is an important entry point into the world of work – amongst the 16-19 year-old cohort, 21% work in foodservice, and 58% of them are female. As these early entrants age, they are joined by older cohorts – so that by the age of 25-29, almost 5% of the working population work in

foodservice (but note that this is a dramatic fall from the 21% of 16-19 year olds who work in foodservice). Another feature is that the percentage of females falls from 58% to close to 50%. These proportions then stay fairly stable over the years. But as they age, a declining share of the population works in foodservice, falling from 8% in the 20-24 cohort to 3% amongst the over 60s.

So, what does this tell us? Well, an exceptionally large share of the under 20s join the foodservice world, and females are measurably over 50% of this young cohort. By the age of 30, the balance between the sexes is almost equal, and it stays there until they retire. And here are some other facts: about 120,000 people with a disability work in foodservice – that is just over 5% of all working people with a disability. And 5% (of those answering the question) are bisexual, gay, lesbian or LGB+ (as defined by ONS). And other data, also from the ONS, on ethnicity and disability underlines the wide cultural mix amongst workers in foodservice.

It is clear that foodservice has a diverse and inclusive workforce; and we have now some detailed numbers to back this up and provide insights for employers.

Let me know if you want further analysis of the numbers.

The rest of this Weekly Briefing Report provides a summary of the short-term news in the past week:

News in the past week

Financial & Legal

- The ban on single use plastic products came into force in England
- The Insolvency Service records 2,432 insolvencies in the UK

Retail

- Aldi to provide free pizza delivery 3 October for students in Manchester, Edinburgh, Cardiff

Restaurants

- City of London Corporation extends pavement licences to September 2024
- Comptoir Group sales rose 2.1% in the first half of the year
- Tasty sales rose 0.9% in the first six months of 2023
- Hostmore LfL sales rose 2% increase in the three months to end September

QSR

- Patty & Bun CVA approved

Pubs

- Adnams sales fell 0.3% in first six months of 2023
- City Pub Group LfL sales rose 12.4% in from end December to end August; organic sales rose 21%
- Shepherd Neame LfL tenanted pub income rose 5.6% in the two months to end August
- Mitchells & Butlers LfL sales rose 9.7% in the quarter to mid-September; food sales rose 11.6%

Leisure

- SSP sales in UK & Ireland rose 100% in the four months to end September versus 2019
- Everyman sales rose 13.3% in the eight months to end August
- Brighton Pier Group sales fell -3.9% in the quarter to mid-September

Delivery

- Deliveroo Hop launches grocery delivery service from Waitrose Kentish Town

Suppliers

- Chapel Down on-trade sales rose 20% in the first six months of 2023

Around the World

- McWin acquires majority stake in Big Mamma Group
- DP Eurasia revenue rose 24.7% in the first half of 2023
- DP Poland system sales rose 26.5% in the first six months of 2023



Tune in to the latest episode of **The Delivery Prophets** podcast, with Andrew Maxwell, Director of Boojum. Prepare for a captivating conversation on the challenges and innovations in the food delivery industry. Uncover the transformative power of technology in the sector. Andrew takes us on a journey through technology systems designed specifically for off-premise operations. Learn how these systems optimise kitchen processes and enhance overall efficiency. Discover the potential of technology to revolutionise the world of delivery and elevate your game!

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