

Foodservice Trends in the US Market (and what's happening back home?!)



Maureen Gahan, Foodservice Specialist

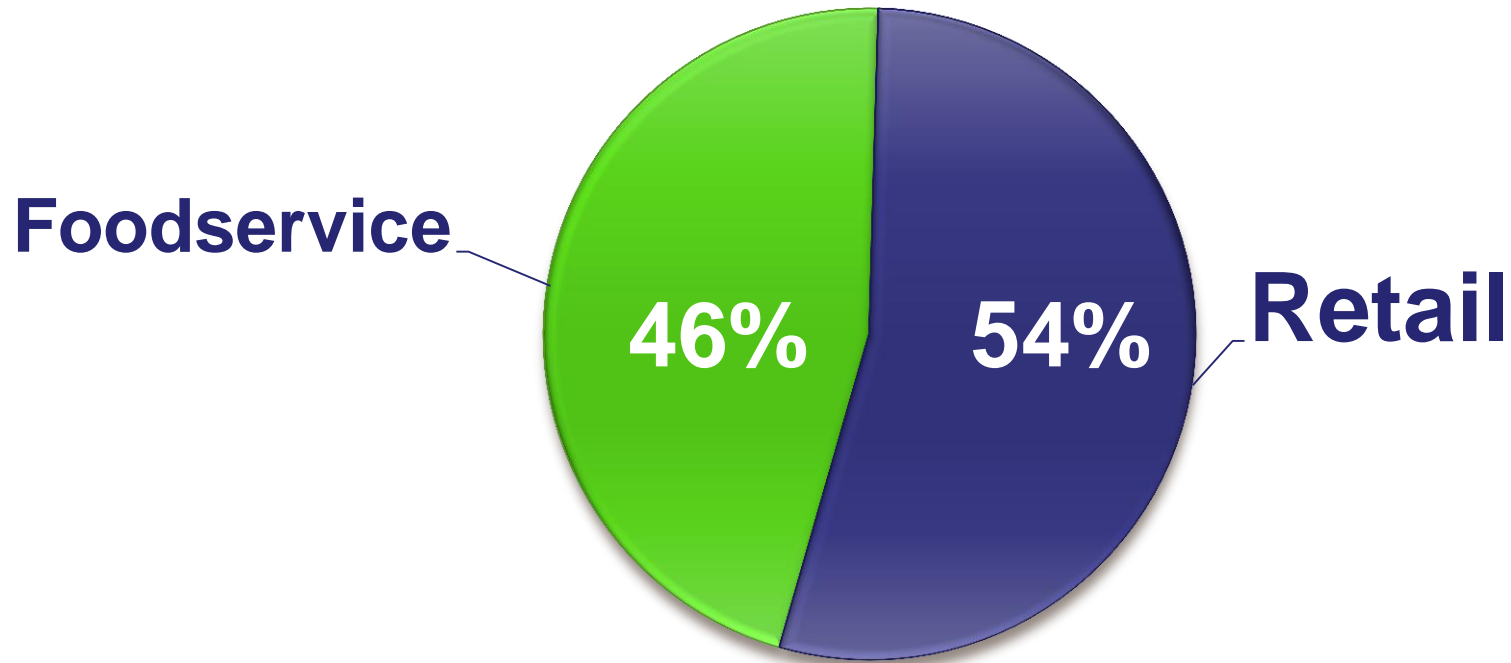
19th September 2013

Growing the success of Irish food & horticulture

Bord Bia
Irish Food Board

- 
- **What's happening in the US Foodservice market?**
 - **What are consumers looking for?**
 - **How are US foodservice operators responding?**
 - **What 'trend tracking' tools are currently available?**

The US food industry is \$1.2 trillion*



* Excludes alcohol

2013 will be positive

- **Slower growth than 2012**
- **Chain market soft – lots of dealing; major chains not opening many units**
- **Non-commercial segments stable**
- **Foodservice stronger than retail**
- **Retailer meal solutions growing**

*Our forecast: +3.5%**

** +0.5% in real terms*

Independents are rebounding

- Doing well, esp. in major metros
- Opening units again
- Better business managers
- Benefiting from positive consumer sentiment

We expect independents to do better than chains during the next five years

Key consumer drivers

- Value offerings
- Customized/made to order



Value/Quality Proposition



*Consumers
in control*

“I like to pursue better value, to help maintain my lifestyle and to get the most from the money I have”

Key consumer drivers

- **Affordable indulgence**
- **Snack items**
- **Non-traditional meal periods**



Mini Ranges



Fluid lives

“I want to manage my busy life and make sure that I am at my best for whatever the day presents”

Key consumer drivers

- **Fresh and natural**
- **Locally sourced**



Provenance



“I am looking for products and brands that are real, authentic and honest, because I know I can trust what's in them and where they come from”

Key consumer drivers

- **Healthy options**



*Quest for health
and wellness*

“I want a balanced approach to health and wellness, to have greater control through the choices I can make”

US Operator trends

- More emphasis on price management
- Food cost control/sourcing practices
- More focused menus



FIVE GUYS[®]
BURGERS and FRIES

SHAKE  SHACK[®]



A digital menu board for Five Guys, displaying the "BURRITOS, TACOS & SALADS" section. The board is divided into two columns. The left column lists "BURRITO", "BOWL", "TACOS", and "SALAD". The right column lists "CHICKEN", "STEAK", "CARNITAS", "BARBACOA", and "VEGETARIAN". A large right-facing curly bracket groups the items in the left column. Prices are listed to the right of each item in the right column.

BURRITOS, TACOS & SALADS		
BURRITO	CHICKEN	6.45
BOWL	STEAK	6.85
TACOS	CARNITAS	6.85
SALAD	BARBACOA	6.85
	VEGETARIAN	6.45



US Operator trends

- New fast casual models (food trucks too)
- Use of social media (esp. independents)
 - Groupon, Facebook, Twitter, Foursquare, Yelp, mobile apps, etc.



US Operator trends

- Artisan/craft products
- Made on premise/house made



URBAN FARM

US Operator trends

- Small plates/shareable foods
- “Twists” on favorites
- More vegetarian options



Some (FREE!) available resources: Bord Bia Monthly Foodservice Newsletter

The screenshot shows a web browser window displaying the Bord Bia Monthly Foodservice Newsletter. The browser's address bar shows the URL: <http://www.bordbia.ie/industry-services/monthlyfoodservicenewsletter/pages/default.aspx>. The website features a navigation menu with links for ABOUT FOOD, ABOUT GARDENING, ABOUT INDUSTRY, ABOUT US, NEWS & EVENTS, and INDUSTRY SERVICES. The main content area is titled "Monthly Foodservice Newsletter" and includes a "Newsletter Archive" with a list of months from August 2011 to March 2010. The current issue is "Ireland Market Foodservice Newsletter – August 2011". The page also contains a "General Industry News" section with articles such as "Travel tax here until Spring", "Queen didn't deliver numbers expected", "Airport in busiest year", and "Bye bye chicken nuggets and chips".

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Weekly Food Alert www.bordbia.ie

The screenshot shows the 'Food Alerts Home' page of the Bord Bia Irish Food Board website. The browser window title is 'Food Alerts Home - Microsoft Internet Explorer provided by Bord Bia'. The address bar shows the URL 'http://www.bordbia.ie/industry/services/information/alerts/pages/default.aspx'. The page features a navigation menu with links for 'ABOUT FOOD', 'ABOUT GARDENING', 'ABOUT INDUSTRY', 'ABOUT US', 'NEWS & EVENTS', and 'INDUSTRY SERVICES'. A search bar is located in the top right corner. The main content area is titled 'FoodAlert' with the tagline 'Capturing Key Trends in the Global Food and Drinks Market'. Below this, there are several sections: 'Market Watch' with articles on Spanish beef consumption and the FAO Food Price Index; 'Product Innovation' with articles on CLA benefits and international customer management; 'Consumer Insights' with articles on UK organic market challenges and European research; 'Retail and Foodservice Developments' with articles on Halal certification and the Spanish retail sector. A left-hand navigation menu lists various services like 'Information Services', 'Publications', and 'Buyers'. On the right, there are sections for 'Market Updates' with category icons (Cattle, Sheep, Pigs, Dairy, Cereals), 'FoodAlert Archives' (2011, 2010, 2009), and 'Subscriptions' for a weekly email alert. The Windows taskbar at the bottom shows the Start button, several application icons, and the system tray with the date '28/09/2011' and time '10:25'.

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Dawn Farm's Weekly Top 9

foodinnovation@dawnfarms.ie



www.hospitality-ireland.com **enewsletter**

The screenshot shows an email client window titled "Hospitality Ireland Report - Message (HTML)". The email header includes:

- From: Hospitality Ireland [editorial@hospitality-ireland.com]
- To: Maureen Gahan
- Subject: Hospitality Ireland Report
- Sent: Thu 05/09/2013 16:26

The main content of the email is the newsletter itself, which features the following sections:

- hospiality ireland REPORT enewsletter** (with the word "REPORT" in a large, stylized font)
- www.hospitalityireland.com
- 05 September, 2013
- Navigation links: [Send to a Friend](#), [Subscribe](#), [Archive](#), [Print All Articles](#), [Contact Us](#)
- In This Issue** sidebar with links to:
 - Entries About To Close For NHA 2013!
 - Hospitality Ireland Technology Survey
 - Clare and Galway In The Spotlight Down Under
 - All-Island Lighthouse Tourism Trail Launched
 - Lets Get Crafty
 - €30K Stolen In Pub Raid After Dublin-v-Kerry Game
 - Kinsale Gourmet Festival Sold Out Already
 - Cava Bodega Opening Soon
- Useful Links** sidebar with links to:
 - [Send to a Friend](#)
 - [Subscribe](#)
 - [Archive](#)
 - [Print All Articles](#)
- National Hospitality Awards** section:
 - Entries About To Close For NHA 2013!**
 - Entries are about to close for this year's National Hospitality Awards, in association with Hospitality Ireland magazine. Enter here. [Read more](#)
 - [Share](#) | [Comment](#)
- Industry News** section:
 - Hospitality Ireland Technology Survey**
 - Hospitality Ireland have partnered with online purchasing specialist, ITradeNetwork to create a survey which will help the industry to understand technology and purchasing habits within the Irish hospitality, foodservice and beverage sector. Enter here. [Read more](#)
 - [Share](#) | [Comment](#)
- Clare and Galway In The Spotlight Down Under**
- The spectacular scenery and rich heritage of counties Clare and Galway will feature in a new TV ad and video – encouraging thousands of Australian travellers to consider Ireland as their holiday destination for 2014. [Read more](#)
- [Share](#) | [Comment](#)

- All-Island Lighthouse Tourism Trail Launched**
- A niche new tourism push has been initiated, with the announcement of a new €2.5 million EU-funded 'All-Island Lighthouse Trail' project for Ireland. [Read more](#)
- [Share](#) | [Comment](#)

The Windows taskbar at the bottom shows the Start button, several application icons (Word, Explorer, Chrome, etc.), and system tray icons including the clock showing 16:23 on 16/09/2013.

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“..a global food trends and ideas agency, specialising in turning food expertise into market-winning products and profit-making strategies..”

- **Fast Casual and independents are driving recovery in the US foodservice market.**
- **Consumers are looking for value; simplicity; fun; authenticity and healthy options.**
- **Tap in to existing information sources that are available.**
- **Don't miss Bord Bia's 2013 Annual Foodservice Seminar!**



Bord Bia 2013 Annual Foodservice Seminar

Wednesday, 6th November 2013

Crowne Plaza Hotel, Northwood

(Santry)

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