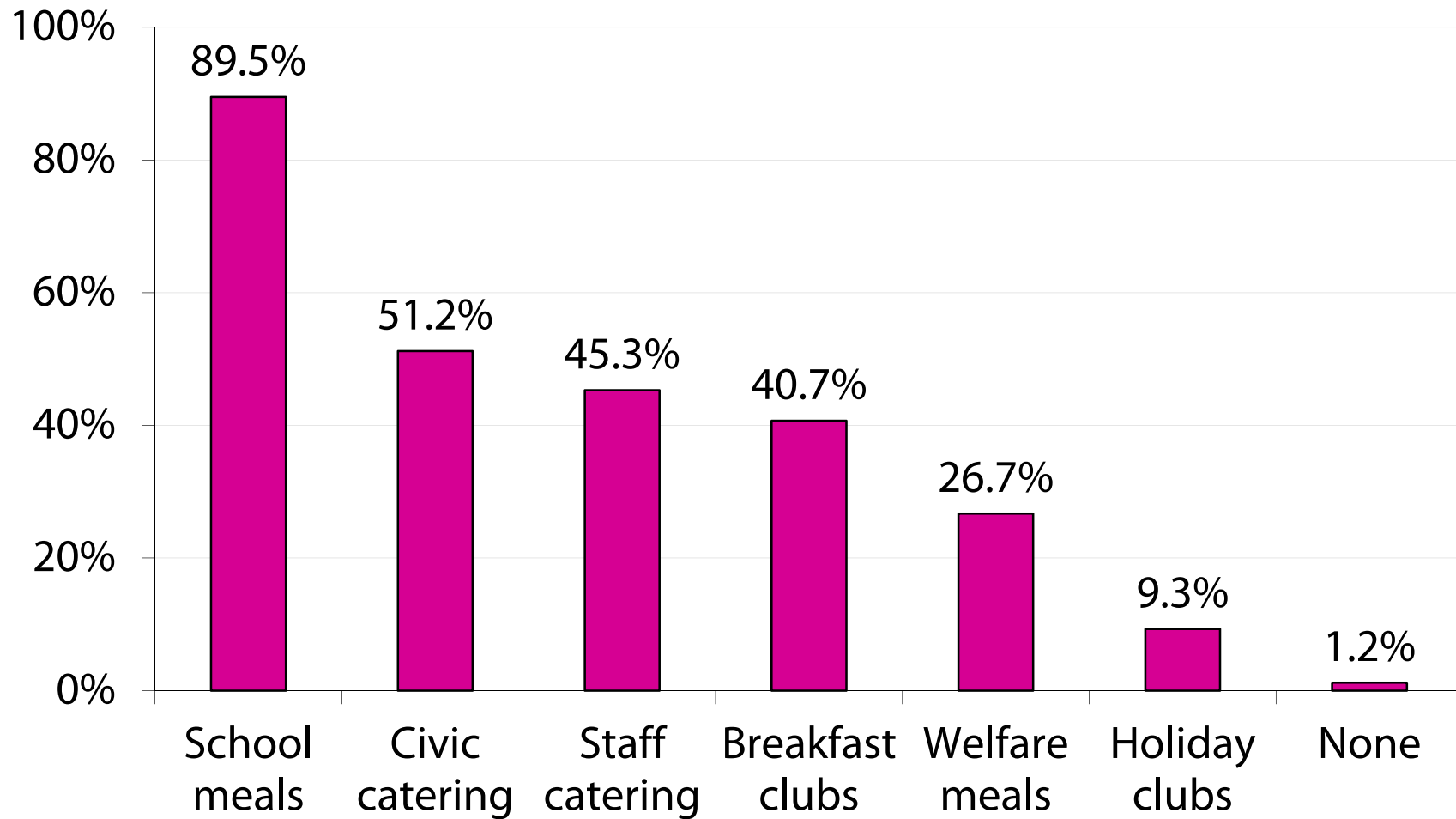




State of the Market in Catering 2016

Rob Bailey
Principal Advisor, APSE

What catering services do you supply? (Tick all that apply)



Rating the introduction of services



Answer options	1 (Low)	2	3	4	5 (High)	Rating average
Universal Infant Free School Meals	0.0%	0.0%	4.8%	13.3%	57.8%	4.70
Revised School Food Standards	1.2%	1.2%	14.5%	20.5%	36.1%	4.21
Food Allergen Labelling	2.4%	1.2%	18.1%	31.3%	44.6%	4.17

Overall, how do you expect the following to change over the next year?



Answer options	Increase A Lot	Increase Slightly	Stay The Same	Decrease Slightly	Decrease A Lot
School Meal Numbers	10.4%	54.5%	32.5%	2.6%	0.0%
Catering Income	10.8%	45.8%	30.1%	13.3%	0.0%

Healthy eating agenda



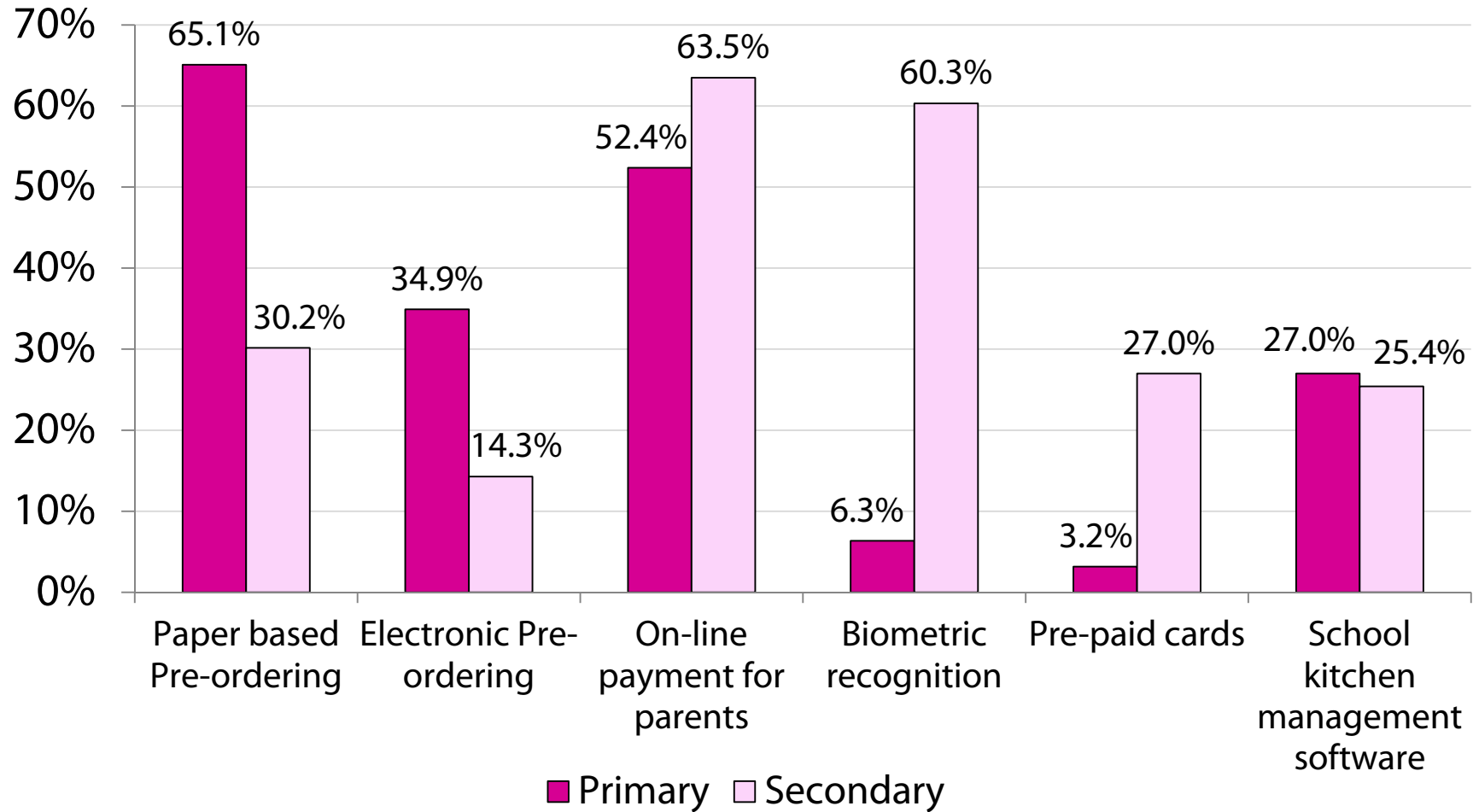
Answer options	Agree Strongly	Agree	Disagree	Disagree Strongly	No opinion
We receive too many catering/food surveys	1.3%	11.3%	47.5%	1.3%	38.8%
The Healthy Eating agenda has gone too far	8.8%	22.5%	57.5%	6.3%	5.0%
School meals should be free for all pupils	27.5%	28.8%	31.3%	8.8%	3.8%
All Academies should be subject to food standards	68.8%	20.0%	1.3%	1.3%	8.8%
School meals are an important facet in tackling obesity	47.5%	40.0%	7.5%	3.8%	1.3%
The Sugar Tax should be extended to all sugary items	11.3%	35.0%	31.3%	10.0%	12.5%

Efficiencies

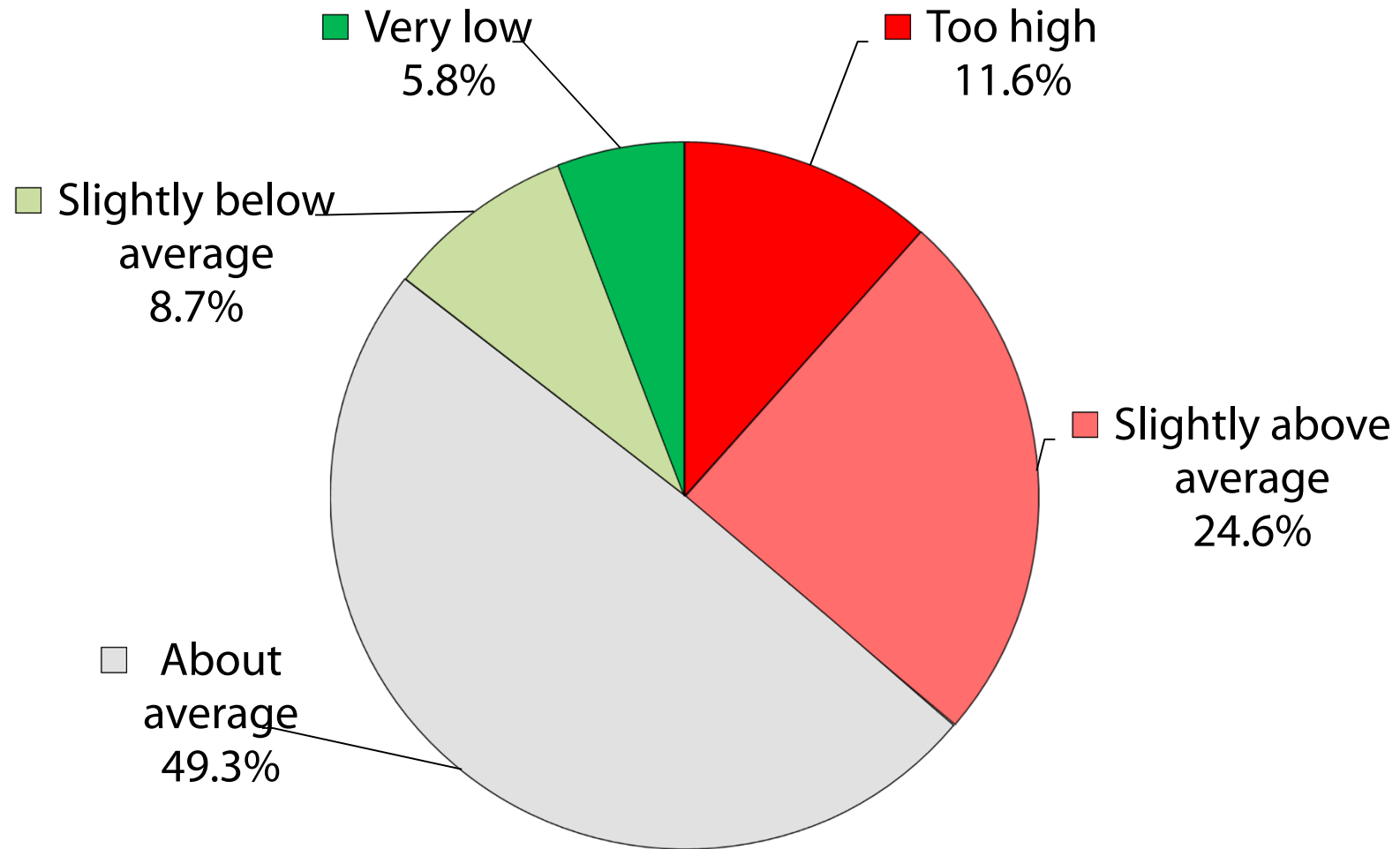


Answer options	Response percent
Reductions in management	37.5%
Renegotiation of meal charging methodology	45.6%
Reduction in Council subsidy	57.5%
Reduced hours	34.8%
Reductions in catering staff	28.1%
Reduction of food on plate cost	13.6%
Reduced use of agency labour	44.4%
Taking over central support functions (e.g. payroll)	19.1%
Increased use of agency labour	2.8%

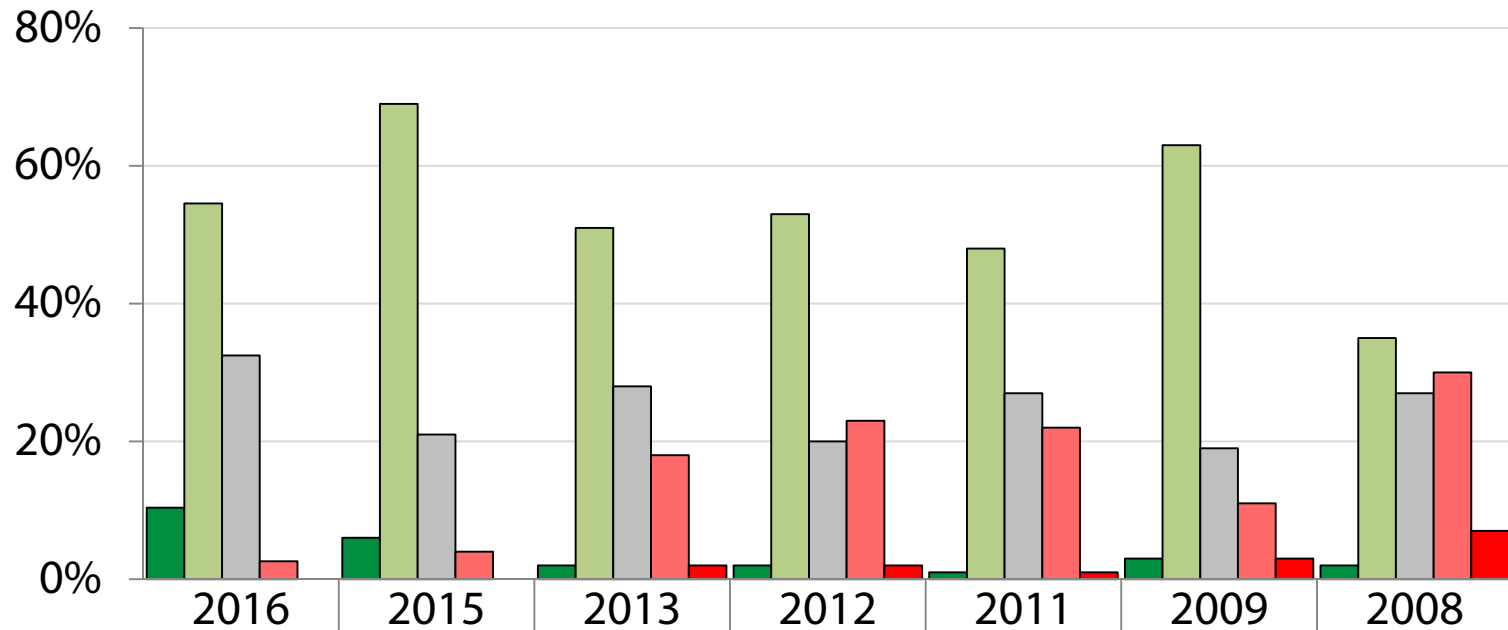
Technology: Which of the following do you use?



Attitude to absence: Are staff absence levels at an acceptable level?

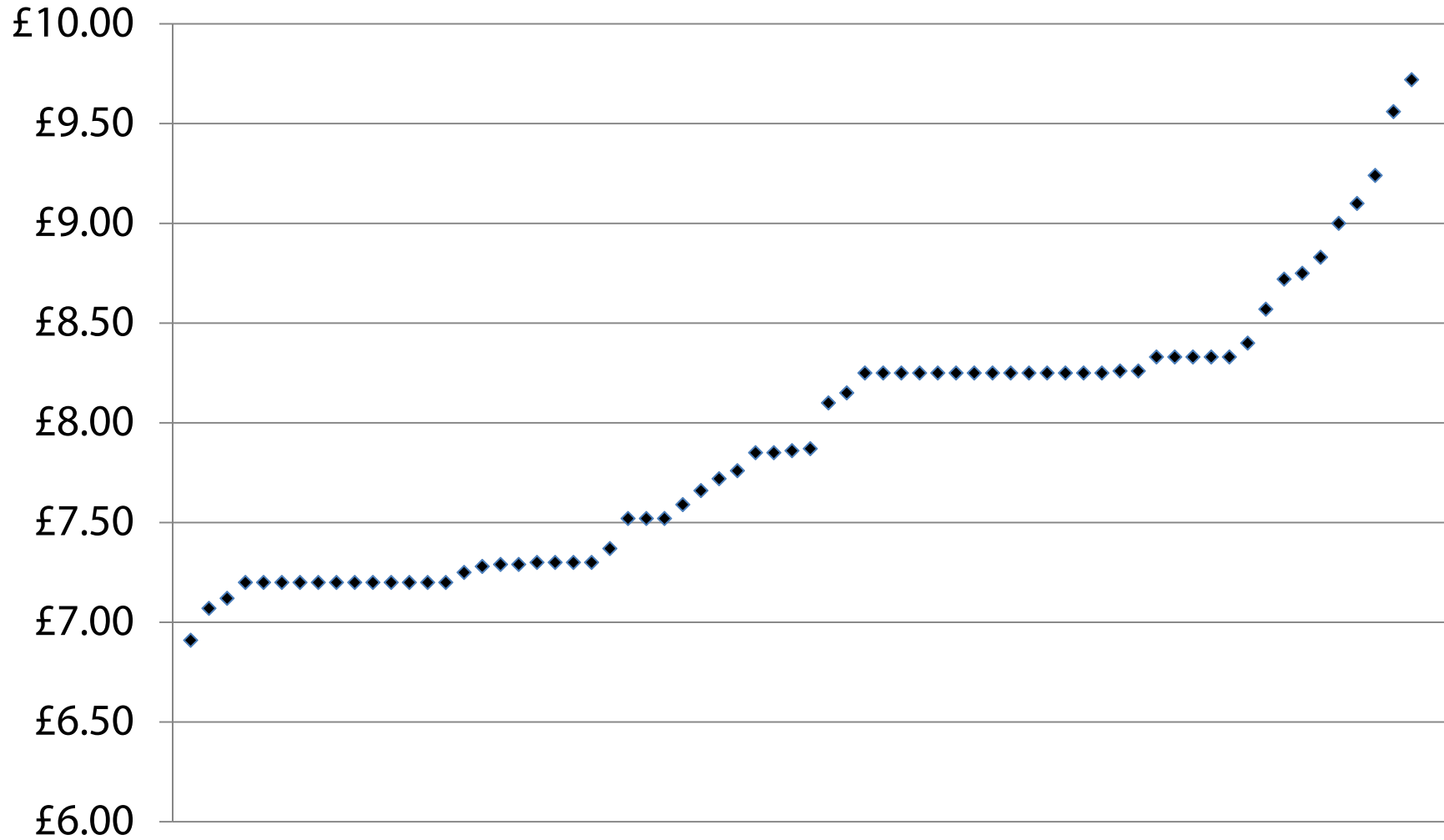


Expectations for school meal uptake (2008 to 2016)



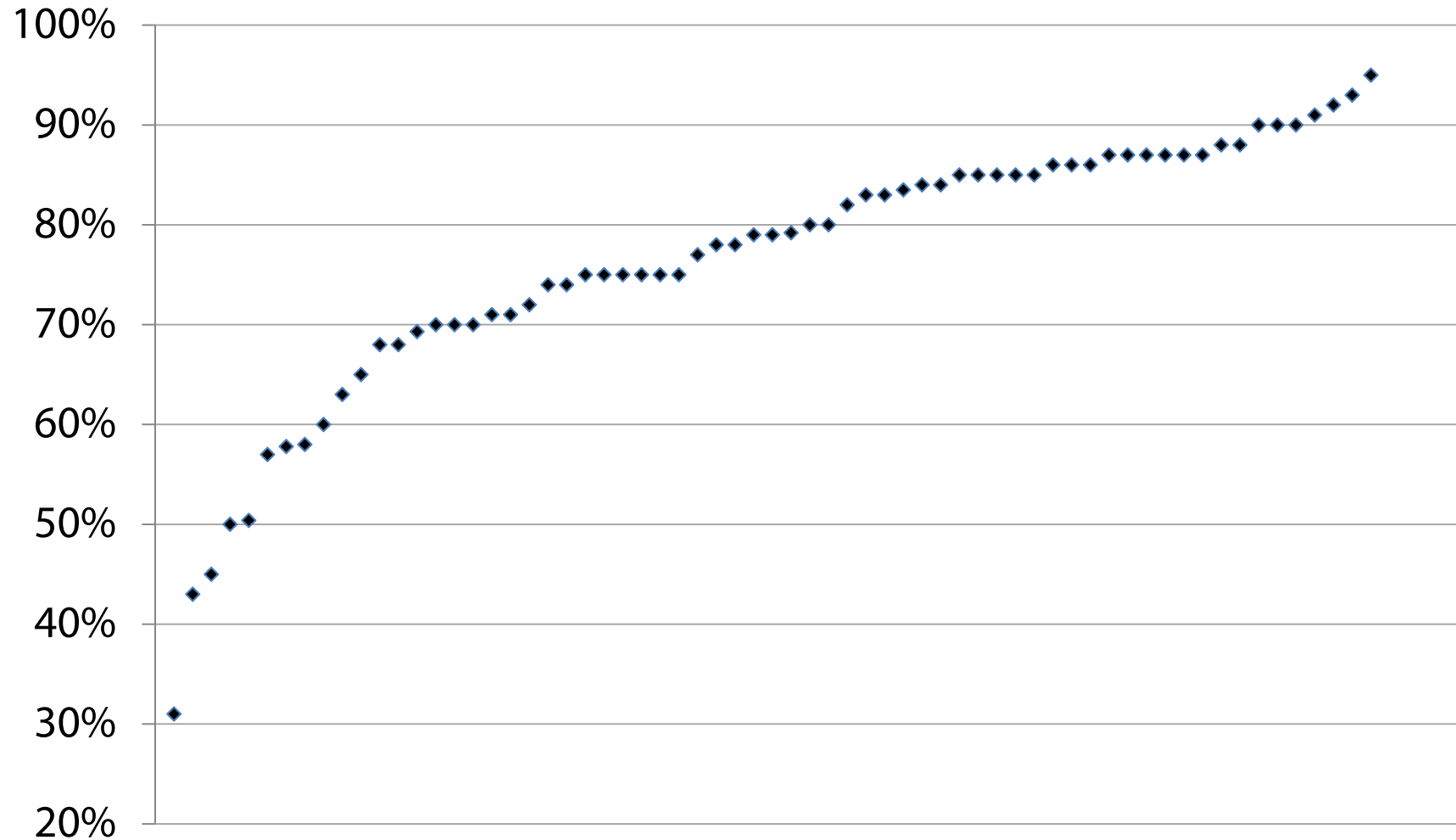
	2016	2015	2013	2012	2011	2009	2008
■ increase alot	10.4%	6.0%	2.0%	2.0%	1.0%	3.0%	2.0%
■ increase slightly	54.5%	69.0%	51.0%	53.0%	48.0%	63.0%	35.0%
■ stay the same	32.5%	21.0%	28.0%	20.0%	27.0%	19.0%	27.0%
■ decrease slightly	2.6%	4.0%	18.0%	23.0%	22.0%	11.0%	30.0%
■ decrease alot	0.0%	0.0%	2.0%	2.0%	1.0%	3.0%	7.0%

Average hourly wage for a catering assistant - **£7.91** (min **£6.91**, max **£9.72**)



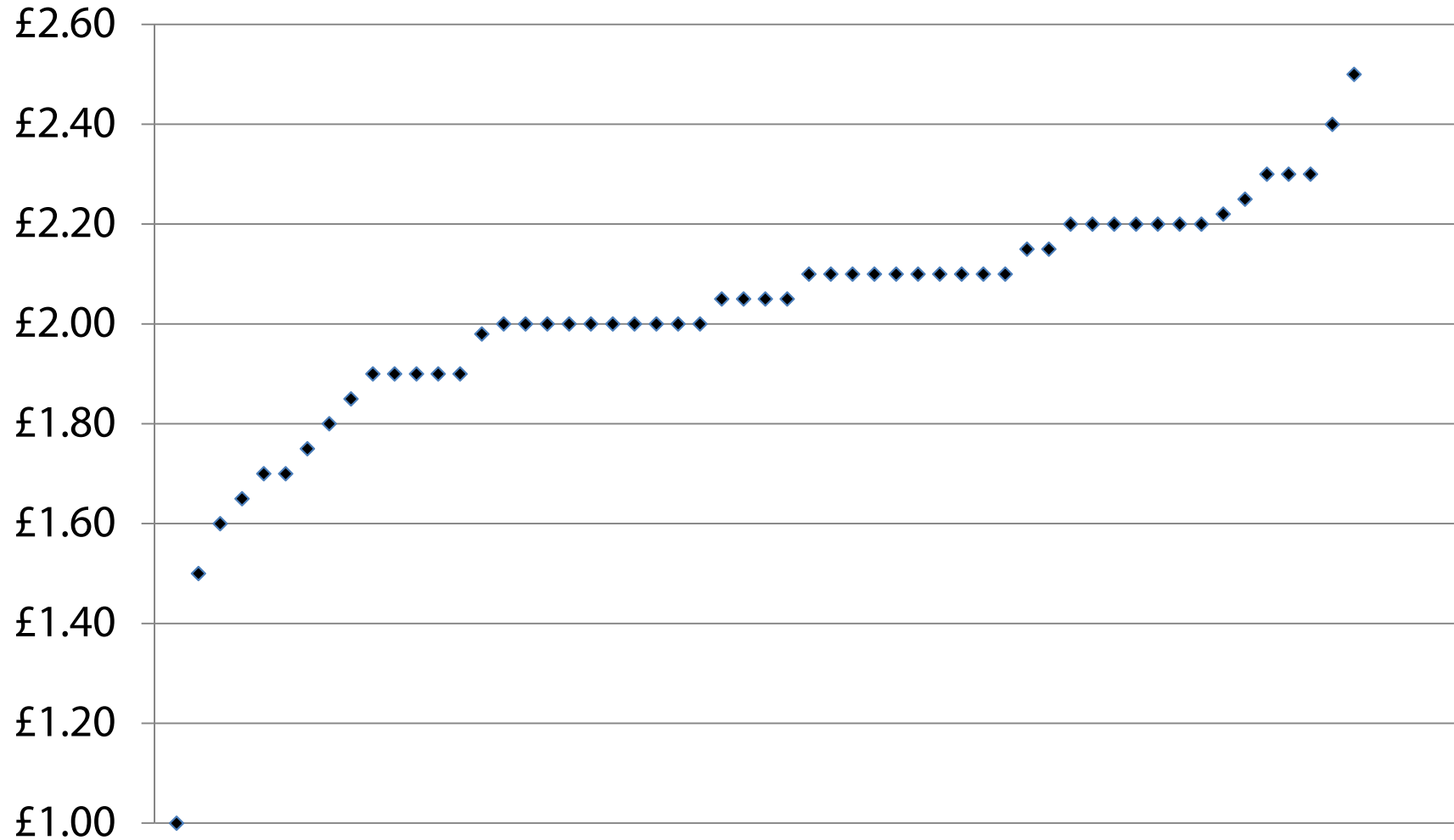
Meal uptake (%) reported among infants

Average – 76.3% (min 31.0%, max 95.0%)

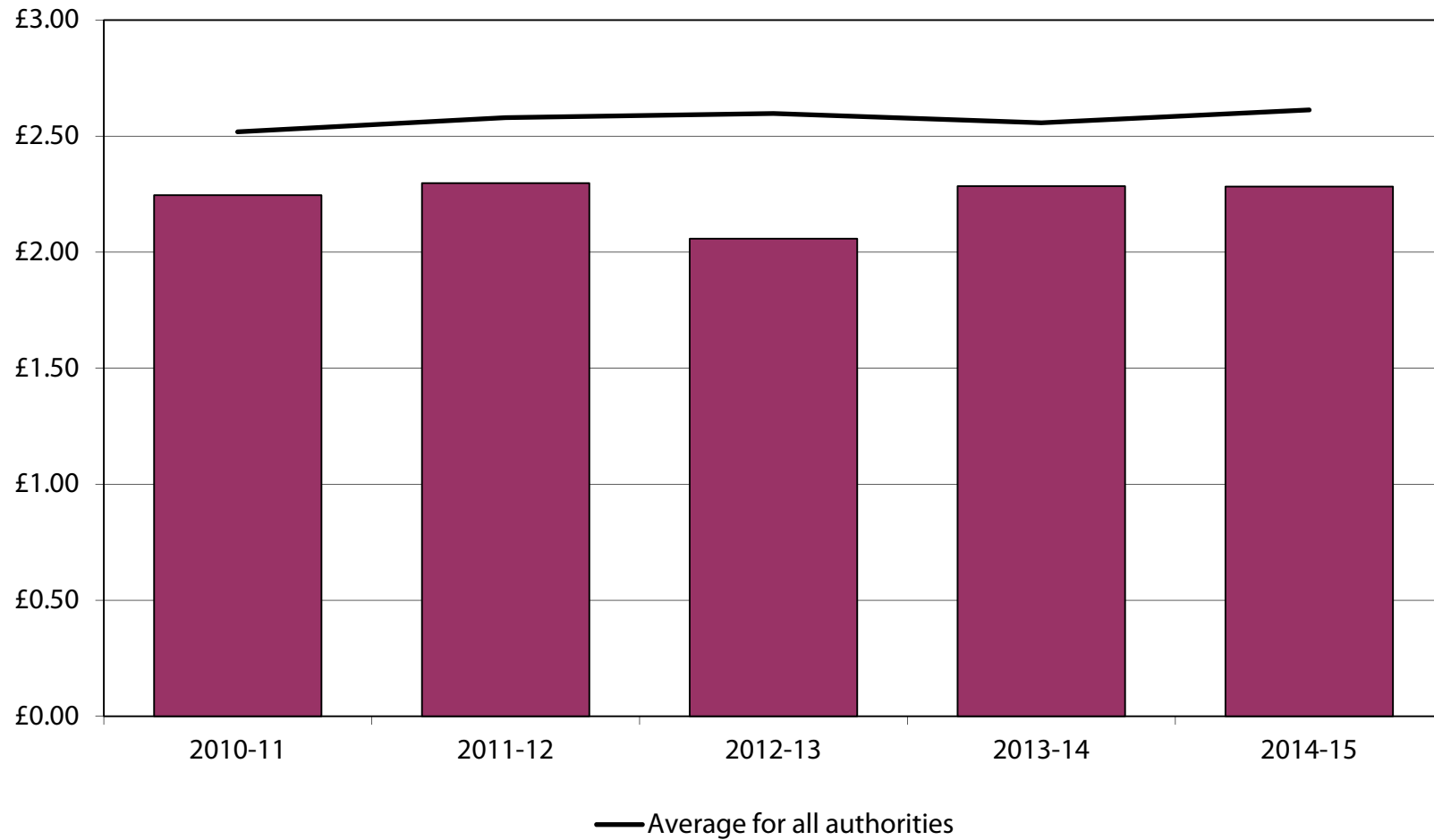


Primary school meal pricing

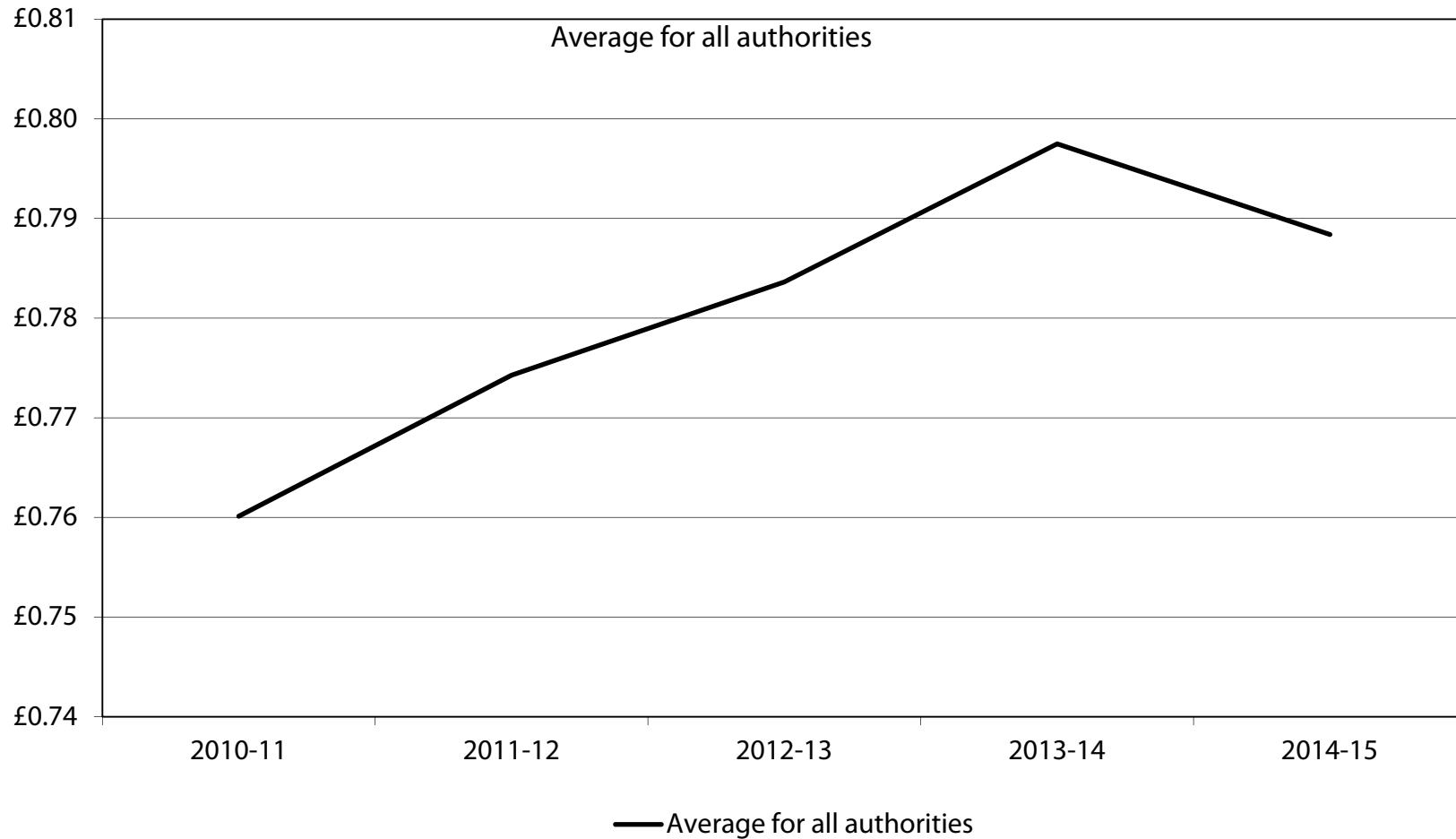
Average - £2.02 (min £1.00, max £2.50)



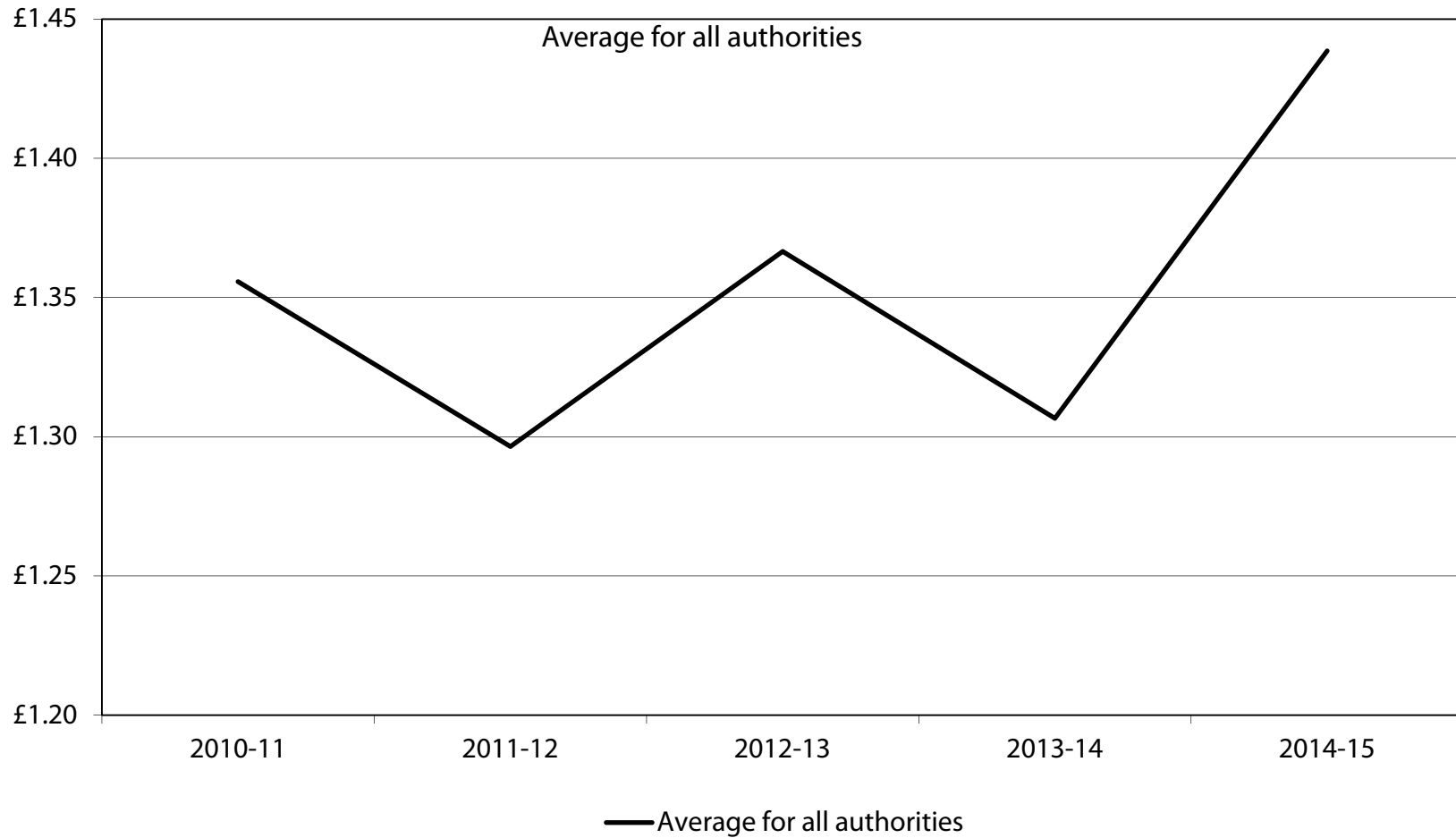
PI 11a Total cost per lunchtime meal (excluding CEC)



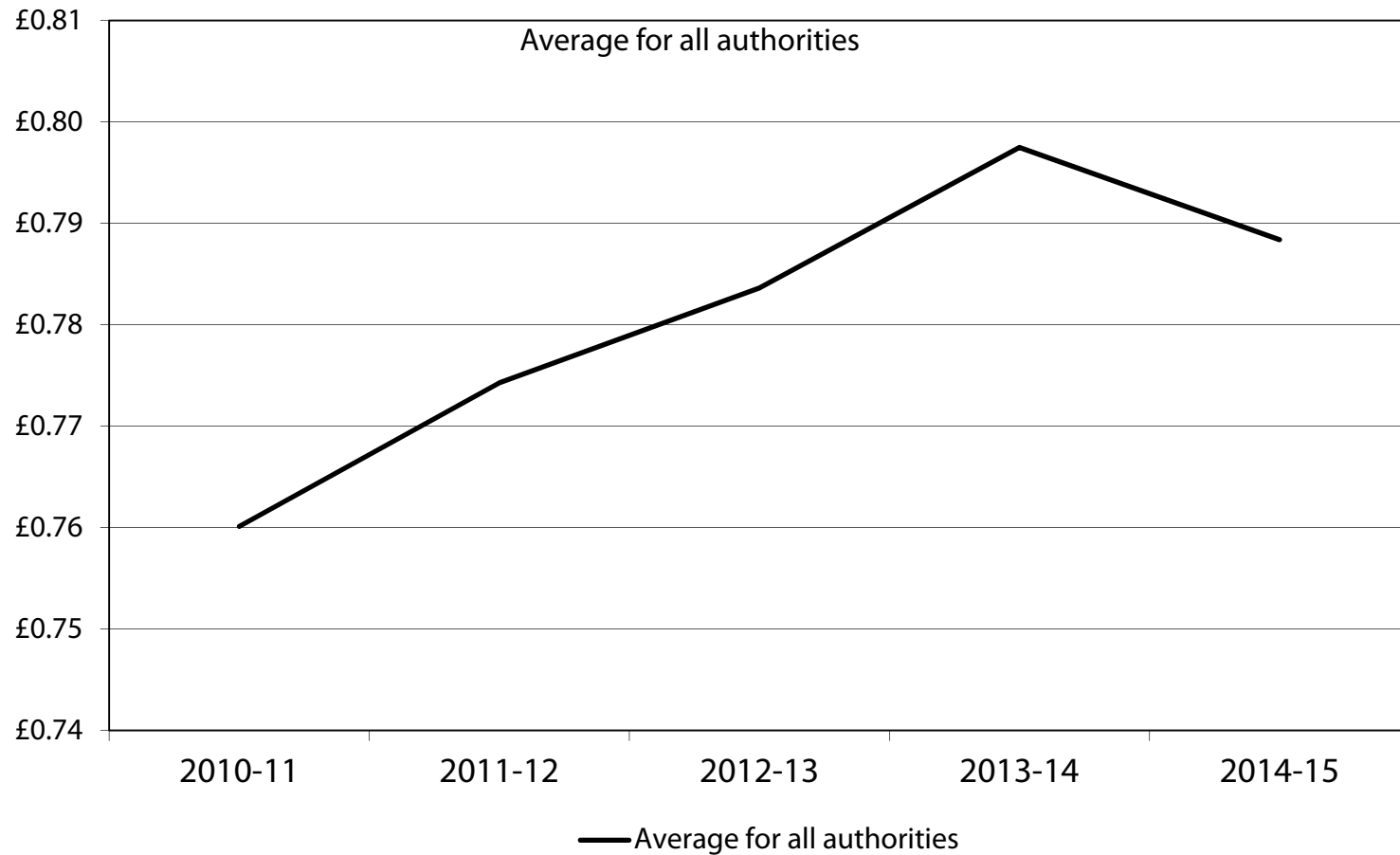
PI 17a Food only cost per lunchtime meal (primary and special schools)



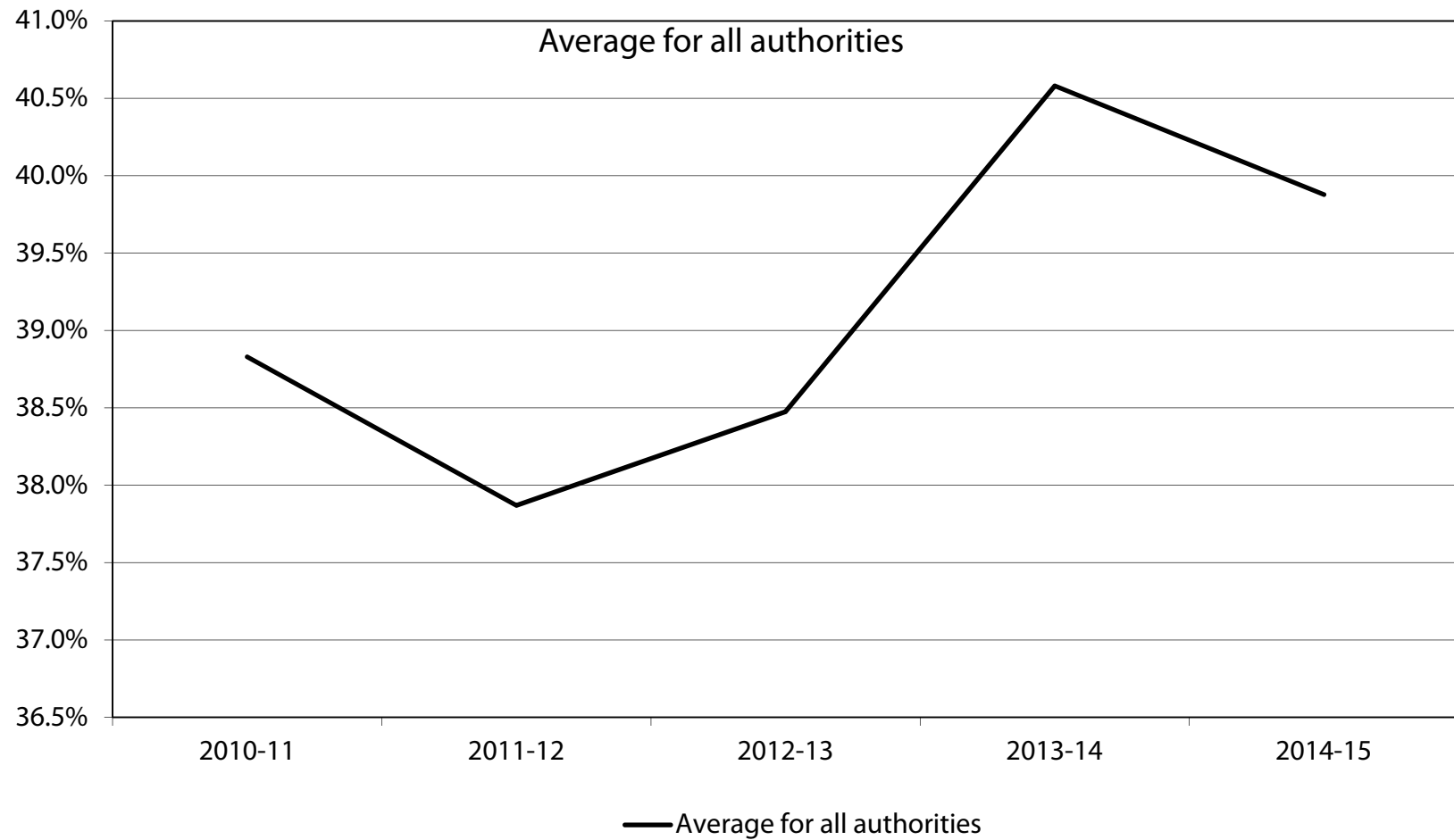
PI 31a Subsidy per lunchtime meal (all meals)



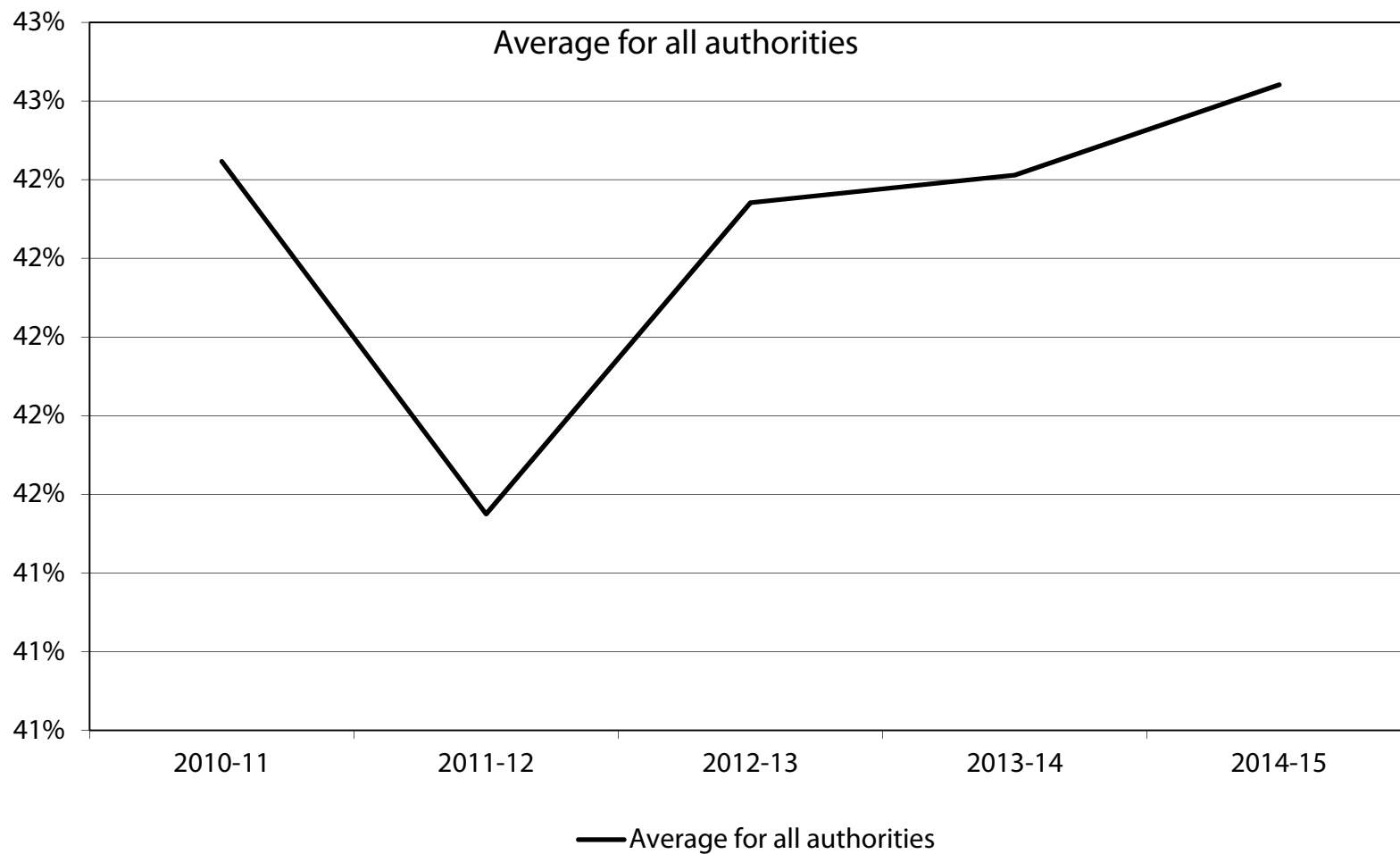
PI 17a Food only cost per lunchtime meal (primary and special schools)



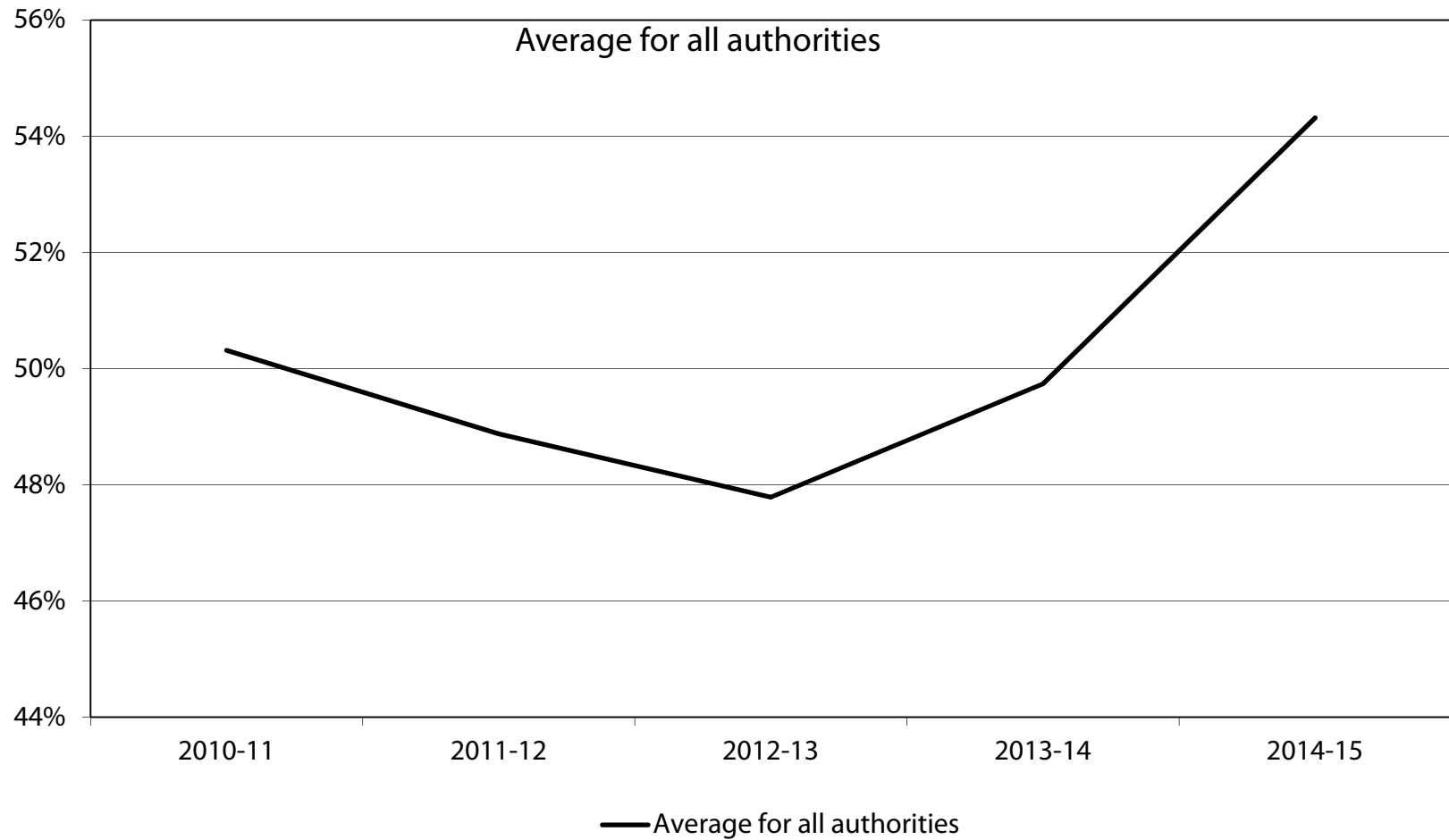
PI 10c Secondary school paid meal uptake (all authorities)



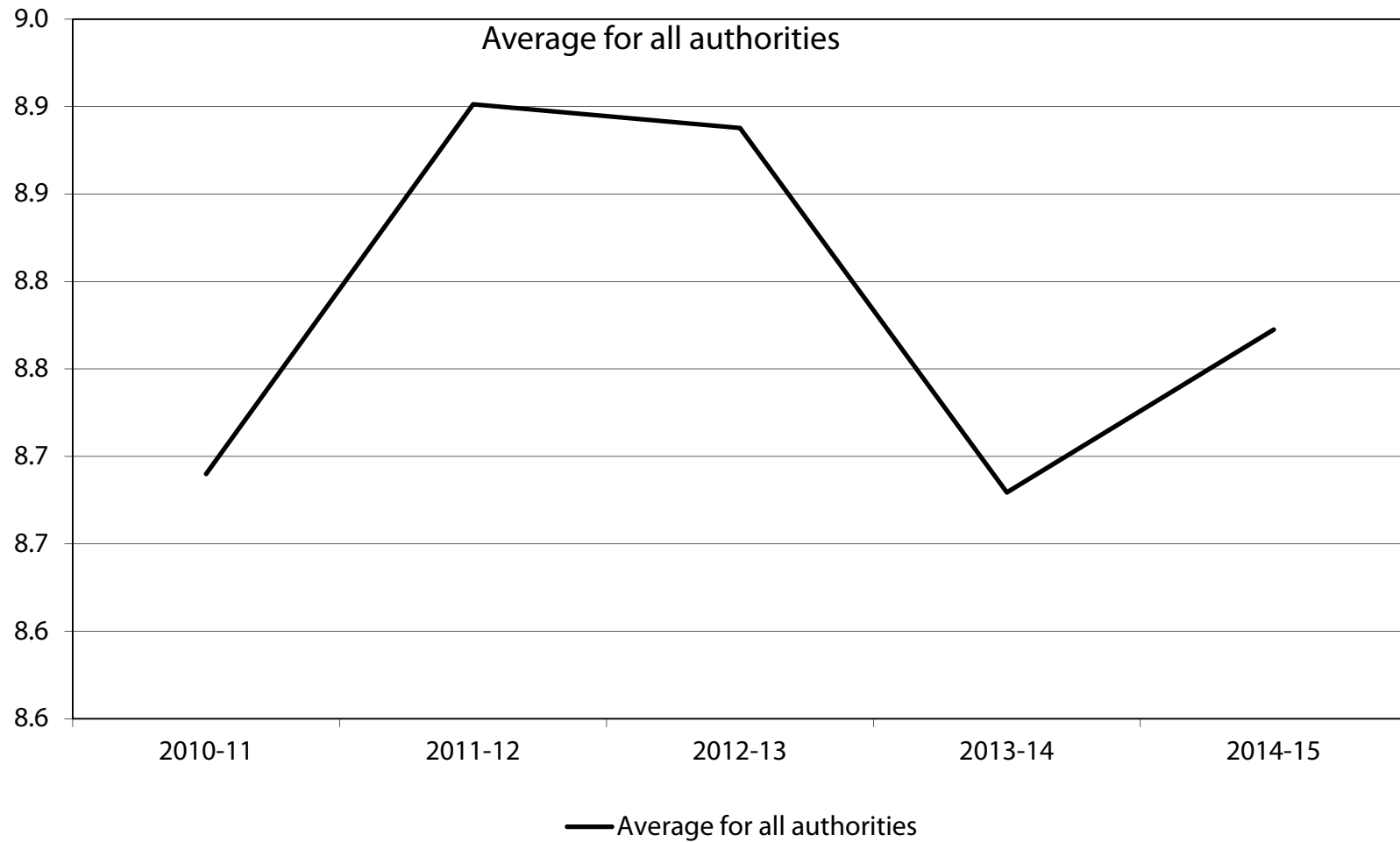
PI 08c Primary school paid meal uptake (all authorities)



PI 36b All meal uptake (primary schools)



PI 13 Primary school lunchtime meals served per staff hour



Growth Areas

- Primary and secondary school meals (with increased KS2 pupils coming from the universal infant free school meals service)
- Increasing nursery meals provision
- Schools in other authorities (contracts outside local authority area)
- Private sector managed or self-managed schools, especially those falling foul of food safety legislation
- Increased sales from being awarded Food for Life status
- Education service - Providing food safety and nutrition knowledge and training to groups of children and specific groups / selling training to schools
- Commercial private sector selling (hospitality catering and local businesses)
- Internal and external partnership working with other departments and local Authorities

Areas of Decrease

- Catering service delivery to other departments Civic catering
- Academies in general
- Academy trusts already having a procured catering provider / academies taking on contracts themselves / schools taking catering in-house
- Competitors offering lower priced services
- Removal of advisory role to social care services
- Loss of secondary contracts
- Possibilities of external contractors being awarded internal services
- Staff welfare

LOCAL SERVICES

LOCAL SOLUTIONS

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