

PRESS RELEASE

16 April 2009

THE CHANGING FACE OF BRITISH MENUS: HAS SIRLOIN STEAK LOST ITS APPEAL FOR GOOD?

Chicken breast has overtaken sirloin steak as the most frequently listed main course item on pub, restaurant and hotel menus, according to new research from market analyst Horizons.

Horizons' biannual Menurama research looks at the dishes listed on Britain's restaurant, hotel and pub menus*. Its latest results clearly reveal the impact of higher costs and price-conscious consumers with last year's most frequently listed main course menu items of sirloin steak, veggie burger, sausage and mash, fish and chips and rump steak being replaced by chicken breast, fish & chips, Sunday lunch and risotto (excluding pizza and burgers).

"Our findings demonstrate that establishments have altered their menus to include cheaper items in response to financial pressures. Premium ingredients have been dropped in favour of more economical dishes and we are seeing the emergence of more traditional British recipes such as meatballs and stews. Fish is also making a stronger appearance on British menus along with vegetable-based starters," commented Horizons' managing director Peter Backman.

"Dishes such as fajitas, mixed grills and some pasta dishes have declined in popularity due to the rising cost of raw ingredients and because operators are continuing to evolve their menus in an effort to give consumers something different, something that they wouldn't cook at home. Spiralling meat costs have prompted operators to reduce the weights of their core meat dishes such as beef burgers and steaks."

While vegetable starters are showing more prominence on menus, Menurama also notes the return of traditional and game meats such as mutton, rabbit and guinea fowl, although fish and seafood main course dishes are being featured more strongly with haddock, calamari and sea bass appearing in the top 10 fish-based ingredients used. Salmon, meatballs and chicken salad have appeared on the list for the first time this year (*see Appendix I for table*).

But despite a rising popularity for British-based main courses, desserts seem to be moving away from the traditional. British puddings such as sticky toffee pudding, fruit crumble and sponge pudding, all of which made the top 10 most frequently listed dessert in January 2008, are now less popular on menus than cheesecake, brownie, and profiteroles. Topping the most frequently listed dessert, however, are still ice cream and sundaes, although ice cream now takes the number one slot.

When it comes to price trends, Menurama reveals it is now costing consumers around 3% more to eat out than it was a year ago, with average spend across all types of outlets at just over £6, up from £5.91 in January 2008.

A two-course meal in a pub restaurant costs an average of £10.99, compared with £10.95 in January 2008. Hotels have got slightly cheaper with an average two-course meal costing £18.48, compared with £19.67 a year ago. A two-course meal in a restaurant now costs just over £14.88, up from £14.30 in January 2008.

** The Menurama analysis was based on menus collected from the top 100 multiple and branded chain foodservice operators and leading independents in January 2009 (see below for full tables).*

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EDITOR'S NOTE:

Peter Backman is the managing director of Horizons, the analyst and specialist information consultant for the foodservice and hospitality sector. Peter is an expert on the structure and dynamics of the foodservice sector, and its supply chain, in the UK and across Europe. He has been involved in foodservice, as an analyst, researcher and consultant, for almost 30 years.

Horizons helps its clients make better business decisions by providing accurate and detailed information about the foodservice market, its trends, and opportunities. The company provides consultancy services, workshops and statistical information based on its model of the sector and

database of key accounts across Europe. The company recently acquired the QuickBite (consumer research) and Menurama (menu tracking) services, adding further depth to its statistical knowledge of the sector.

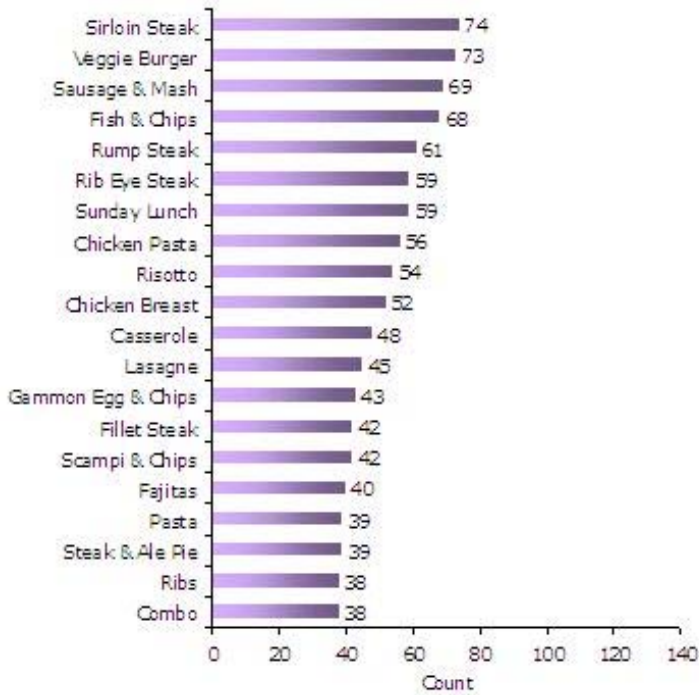
The company's clients includes Compass and Whitbread, suppliers such as 3663, Brakes, Cadbury, Coca-Cola, Procter & Gamble and Electrolux, investors JP Morgan and Goldman Sachs and trade associations such as the British Hospitality Association and the Food and Drink Federation. Horizons' views have been sought by organisations such as the Bank of England, the Department for Culture Media and Sport and the Department for Environment, Food and Rural Affairs.

Peter Backman is a regular contributor to industry conferences and his views are often sought by the business and trade press, TV and radio.

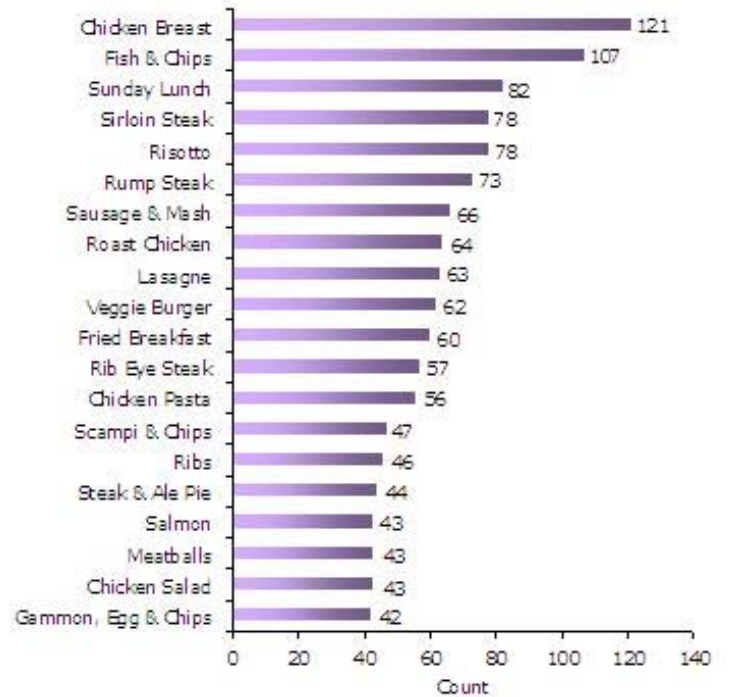
(ends. Tables to follow)

Total Survey: 20 Most Frequently Listed Main Course Dishes*

January '08



January '09



* Excludes Burger and Pizza

January 2009

Horizons

APPENDIX II: Total Survey Average Price Trends

	Jul '05	Jan '06	Jul '06	Jan '07	Jul '07	Jan '08	Jul '08	Jan '09	% Yr	New Dishes
Starter	4.03	4.08	4.27	4.72	4.82	4.74	4.70	4.88	2.95	4.51
Main Course	7.70	7.86	7.93	8.28	8.49	8.59	8.73	8.86	3.14	7.98
Dessert	3.43	3.45	3.55	3.75	3.81	3.89	3.97	4.05	4.11	3.65
Snack	3.91	3.90	4.16	4.17	4.29	4.33	4.32	4.52	4.39	4.41
Average - Total Menu	5.41	5.45	5.72	5.79	5.93	5.91	5.92	6.08	2.88	5.85

Note: Total menu data includes all food category types (snacks, side orders, specials, children's menu, meal deals etc) but not drinks

APPENDIX III: Three Course Menu Price Trends

Jan '08	South	Midlands	North	Scotland	Average
Starter	5.23	4.61	4.64	4.48	4.74
Main	9.28	8.46	8.34	8.28	8.59
Sub total	14.51	13.07	12.98	12.72	13.33
Dessert	4.15	3.79	3.80	3.80	3.89
Total	18.66	16.86	16.78	16.52	17.22
% Jan vs Jul	2.98	2.86	-0.48	-0.19	0.58

Jul '08	South	Midlands	North	Scotland	Average
Starter	5.04	4.46	4.68	4.63	4.70
Main	9.19	8.45	8.55	8.72	8.73
Sub total	14.23	12.91	13.23	13.35	13.43
Dessert	4.18	3.80	3.92	3.97	3.97
Total	18.41	16.71	17.15	17.32	17.40
% Jul vs Jan	-1.34	-0.89	2.20	4.84	1.04
% Year	1.60	1.95	1.72	4.65	1.63

Jan '09	South	Midlands	North	Scotland	Average
Starter	5.39	4.52	4.93	4.68	4.88
Main	9.29	8.43	8.87	8.85	8.86
Sub total	14.68	12.95	13.80	13.53	13.74
Dessert	4.36	3.87	3.99	3.98	4.05
Total	19.04	16.82	17.79	17.51	17.79
% Jan vs Jul	3.42	0.66	3.73	1.10	2.23
% Year	2.04	-0.24	6.02	5.99	3.45