



**FOCUS ON FOODSERVICE 2007 AND 2010 COMPARISON  
COST SECTOR**

**FOOD PURCHASES**

Food Categories	STAFF CATERING	HEALTHCARE	EDUCATION	OTHER	TOTAL
	2010 £ millions	2010 £ millions	2010 £ millions	2010 £ millions	2010 £ millions
Frozen	20	109	94	8	231
Chilled - Long Life	18	93	115	25	251
Chilled - Short Life	45	194	138	32	409
Ambient	48	111	166	44	369
<b>Total</b>	<b>130</b>	<b>507</b>	<b>513</b>	<b>109</b>	<b>1,259</b>

**FOCUS ON FOODSERVICE 2007 AND 2010 COMPARISON - COST SECTOR**

**GENERAL INFORMATION**

Information Categories	STAFF CATERING			HEALTHCARE			EDUCATION			OTHER			TOTAL		
	2007	2010	% Gain/Loss	2007	2010	% Gain/Loss	2007	2010	% Gain/Loss	2007	2010	% Gain/Loss	2007	2010	% Gain/Loss
No. of Outlets	10,885	10,239	-5.9	30,846	31,196	1.1	29,431	28,754	-2.3	2,401	2,409	0.3	73,563	72,598	-1.3
No. of Meals Served - Millions	303	149	-50.8	741	786	6.1	717	803	12.0	116	116	0.0	1,877	1,854	-1.2
Food and Drink Sales £ millions	717	378	-47.3	650	689	6.0	842	967	14.8	148	134	-9.5	2,357	2,168	-8.0

Source: Horizons FS Ltd. For further information, contact Peter Backman, Horizons FS Ltd. Tel: 020 8349 0162  
Website: [www.hrzn.com](http://www.hrzn.com)



Foodservice Sector 2007 to 2010  
Staff catering, Health care, Education, Services  
Excluding Contract Catering

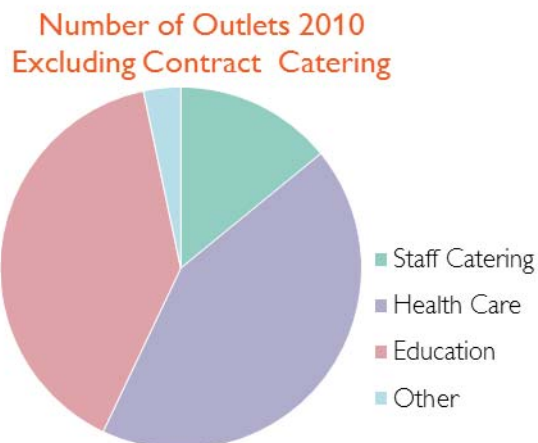
Outlets

	2007	2010
Staff Catering	10,885	10,239
Health Care	30,846	31,196
Education	29,431	28,754
Other	2,401	2,409
TOTAL	73,563	72,598

Source: Horizons

Note: Although excluded from these figures, Contract caterers operate in all these sectors

- These sectors are united in that subsidies are a significant operational element for most outlets although this is decreasing, especially in the staff catering (B&I) sector
- The 72,000 or so outlets in the institutional/non-commercial sector account for about 28% of all foodservice outlets
- Numbers are declining partly because the former increases in the care homes sector are slowing down as a result of cutbacks in local authority spending.



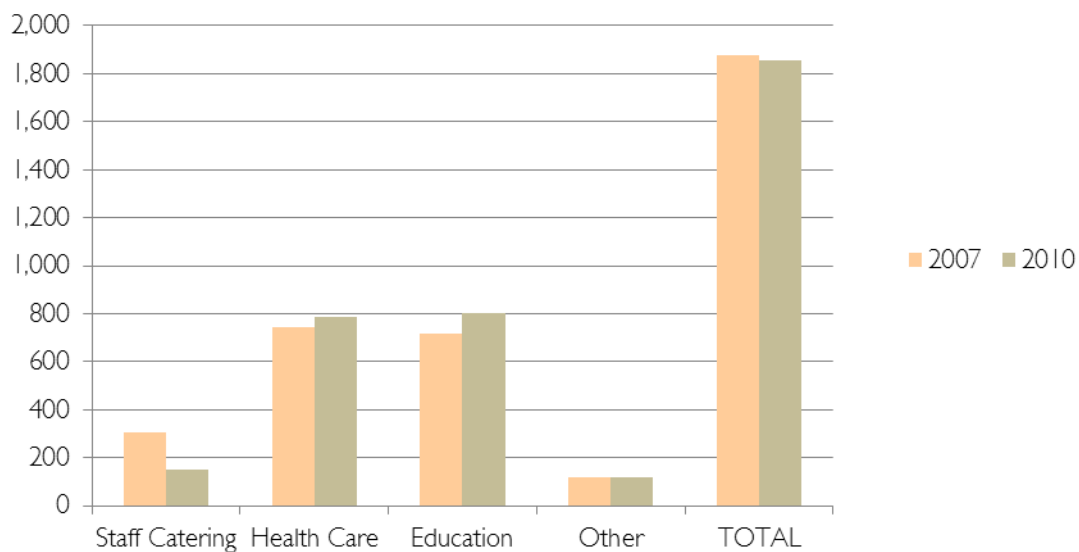
Foodservice Sector 2007 to 2010  
 Staff catering, Health care, Education, Services  
 Excluding Contract Catering

Meals	Millions	Millions
	2007	2010
Staff Catering	303	149
Health Care	741	786
Education	717	803
Other	116	116
<b>TOTAL</b>	<b>1,877</b>	<b>1,854</b>

Source: Horizons

- The numbers of meals (excluding those served by contract caterers) fell by -1.2% between 2007 and 2010
- This decline was due primarily to the halving of meals in self-run staff catering
- Between 2007 and 2010, meals served in the health care and education sectors grew by 6.1% and 12.0% respectively

Meals (Millions): 2007-2010  
 Excluding Contract Catering



Foodservice Sector 2007 to 2010  
 Staff Catering, Health Care, Education, Services  
 Excluding contract catering

Food Purchases	2007		2010			
	£ Millions					
	Total	Total	Ambient	Chilled - long life	Chilled - short life	Frozen
Staff Catering	323	130	48	18	45	20
Health Care	520	507	111	93	194	109
Education	494	513	166	115	138	94
Other	116	109	44	25	32	8
<b>TOTAL</b>	<b>1,453</b>	<b>1,259</b>	<b>369</b>	<b>251</b>	<b>409</b>	<b>231</b>

Source:  
Horizons

- Total demand for food declined by -13.4% in nominal terms between 2007 and 2010
- Frozen food accounts for 18% of all food in these sectors – up from 16% in 2009
- At £409million in 2010, demand for Chilled short-life food is almost twice as large as demand for Frozen food

Foodservice Sector 2007 to 2010  
 Staff Catering, Health Care, Education, Services  
 Excluding contract catering

Food & Drink Sales	£ Millions	
	2007	2010
Staff Catering	717	378
Health Care	650	689
Education	842	967
Other	148	134
<b>TOTAL</b>	<b>2,357</b>	<b>2,168</b>

Source: Horizons

- From 2007 to 2010, food and drink sales fell by -8% which was less than the fall in purchases reflecting reflects the on-going reduction in subsidies with the result that operators are generating more income direct from their customers.
- Sales in the Education sector grew fastest of all these sectors over the period 2007 to 2010
- The Health care sector also grew – at 6% over the same period

For full definitions of these sectors go to Horizons website [www.hrzn.com](http://www.hrzn.com) and click on “Detailed definitions”