

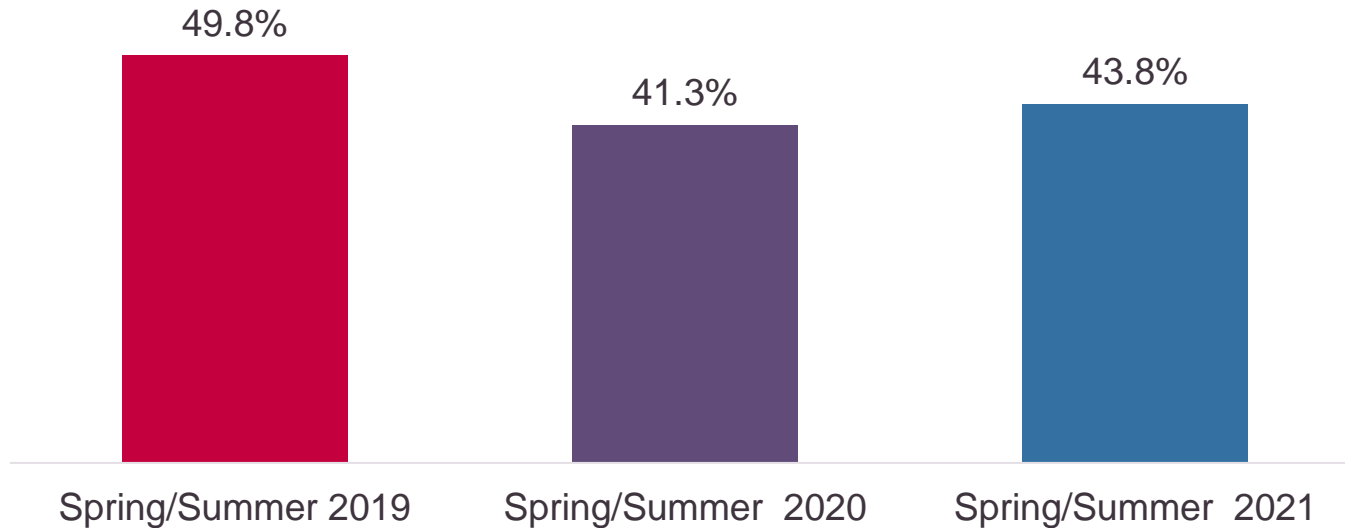
# Lumina Intelligence Menu & Food Trends Report 2021

Sample Report

# 44% OF NEW MAIN DISHES FEATURE A DIETARY REQUIREMENT

Two in five new main dishes across chain and managed pub/bar restaurants were tagged with at least one dietary requirement, up +6% year-on-year. Operators are putting a greater focus on new products that cater for dietary requirements despite reducing new products across menus. New product development should align with consumer trends for plant-based eating and inclusivity with gluten and dairy-free propositions.

Proportion of “new” main dishes tagged on menus with a dietary requirement, Spring/Summer 2019 - 2021



Note: Analysis includes chain restaurants and managed pub/bar restaurants, main dishes only

Source: Lumina Intelligence, Menu Tracker Tool, Spring Summer 2021

## Dietary Requirement NPD

**BUCKET OF CAULIFLOWER WINGS** PB  
Coated in a lightly spiced quinoa breadcrumb with your choice of flavour.

### Belushi's

**NEW ALL PLANT NO GOAT CURRY** V PB  
ask for VG ask for GF

For those who like it hot. A spicy Dominican-style jerk jackfruit & Scotch bonnet chilli curry with spring onion rice, fried plantain & pink pickled onions.

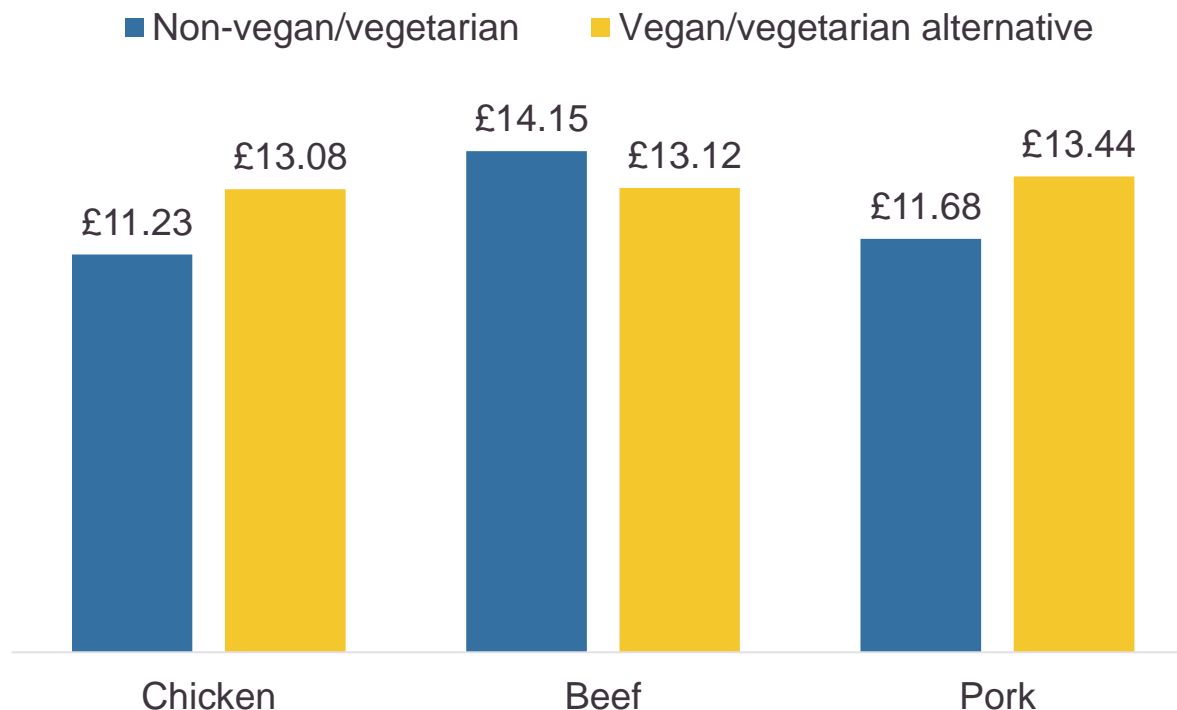
**NEW MEXICAN POPPADOMS** V PB ask for VG ask for GF  
Crispy blue corn tortillas with roasted tomato salsa, green jalapeño & coriander salsa & guacamole.

### Las Iguanas

# PRICE PREMIUM FOR VEGAN / VEGETARIAN ALTERNATIVES

Dishes with a vegan or vegetarian alternative offer a price premium overall. Excluding beef dishes, chicken and pork dishes are 14% and 13% more expensive, respectively.

## Average dish price by named protein, Spring/Summer 2021



- For two out of the three proteins analysed, dishes with vegan/vegetarian alternatives cost significantly more than their non-vegan/vegetarian counterparts. Chicken dishes offering a plant-based alternative, comprised the largest difference in price of +£1.85 per serving.
- Alternatively, beef dishes that do not offer a vegan or vegetarian alternative are cheaper. This is primarily driven by a significant number of high priced steak dishes offered at Premium cluster venues.
- Sustainability presents a key opportunity for operators to increase average spend and improve brand perception for an increasingly sustainability-focussed customer base.

Source: Lumina Intelligence Menu Tracker Tool, Spring/Summer 2021; Lumina Intelligence Eating and Drinking Out Panel 2021

Note: To create a like-for-like analysis, this section is comparing on the course and protein level



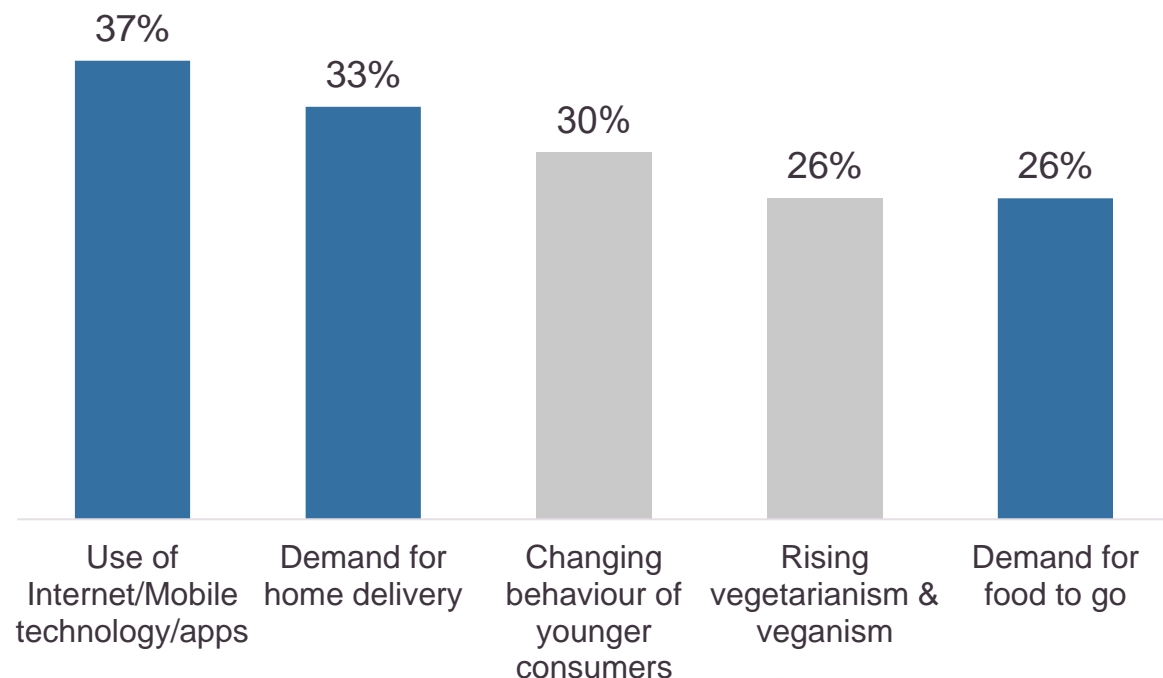
# TECH INNOVATION CONTINUES TO DRIVE CONVENIENCE TREND



## CONVENIENCE

Convenience-related trends feature heavily in the most important long term consumer trends impacting the industry. Technological developments in ordering and payment technology are driving the trend for fast and convenient service across grocery and hospitality.

What are the most important long term consumer trends impacting the industry? (multiple choice) (top 5)



Source: Lumina Intelligence Top Of Mind Report, July 2021

Amazon, Tesco and Sainsbury's are enhancing convenience for tech-savvy shoppers through their till-less stores.

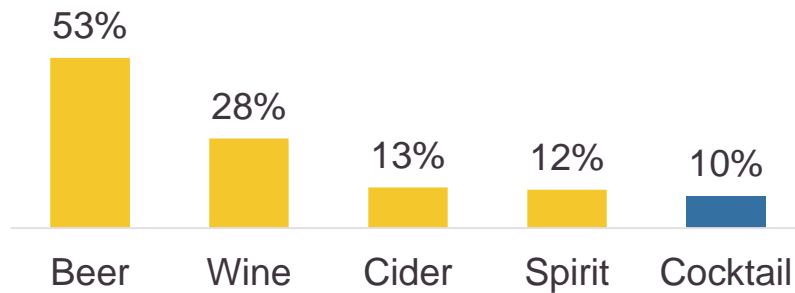


Partnerships have been a growing area of convenience. In November 2021, **M&S Food** announced it was partnering with **Costa Coffee** to sell its food in the coffee chain's franchise stores from early 2022.

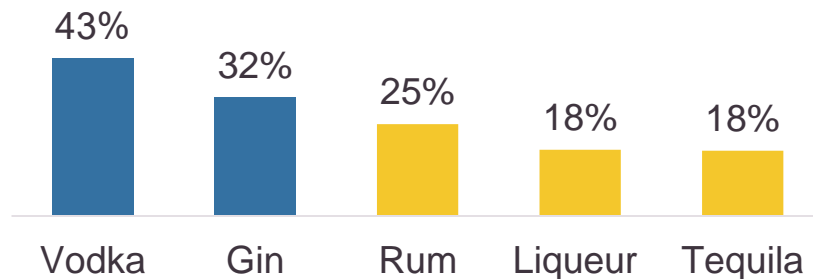
# FOODSERVICE TO GROCERY TRICKLE – PREMIUM COCKTAILS

Cocktails have been expanding throughout foodservice with cocktails now accounting for one in ten alcoholic drinks consumed in foodservice. Premium craft pre-mix batch cocktails have expanded into the off-trade with retailers using cocktails to drive spend.

Alcoholic drinks consumed in foodservice by type,  
Nov 2020-2021



Vodka and Gin are most popular spirits in cocktails in foodservice



Source: Lumina Intelligence Eating & Drinking Out Panel, November 2021



WKD pre-mix Tropical Sunrise and Blue Lagoon, launched into grocery in May 2021.



**Pre-mix cocktails** have been commonplace in grocery for several years, however retailers are escalating the quality of these offers, to replicate the out of home experience at home.

**Waitrose** launched the Heston Lazy Espresso Martini. Designed by **Heston Blumenthal** and using the same coffee served at his restaurant The Fat Duck, the drink is designed for consumers to shake with ice and strain, and enjoy a **premium cocktail** from home.

# VERTICAL FARMING EXPLORED BY UK FOODSERVICE OPERATORS

**Vertical farming allows to grow food with fewer resources, making it more sustainable.** Vertical farms have the potential to grow an array of fresh foods, with the ability to control the exact conditions including temperature and water quality. More foodservice businesses in the UK are expected to invest in vertical farming as the UK's supply chains are tested amidst Brexit as well as consumer demand for more sustainable food.

**Jones Food Company** builds and operates vertical farms in the UK.

## Benefits of vertical farms:

- Growing on stacked layers increase the amount of food that can be grown per square metre
- Water usage can be reduced by up to -90% compared to traditional farming
- LED lighting can give plants the precise light spectra they require for growth, improving yield, taste and quality
- Indoor growth removes the need for using chemical pesticides and herbicides



**Harvest London**, established in 2017, is said to be 'shaping the future of food'. Vertical farming reduces waste at every step and allows users to grow food locally.



**Pizza Pilgrims** partnered with **Harvest London** in 2020. Harvest London is now the chain's basil supplier, using its vertically-grown product. The move is said to have saved the company over 250,000 food miles per year switching to a local supplier from overseas.

Source: Lumina Intelligence, December 2021

# Get in touch

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