

# PUBLICSECTOR CATERING

THE FUTURE OF PUBLIC SECTOR CATERING 2023 to 2028  
Sample pages and outline of report



# Report Methodology

## Methodology:

- Identification of the relevant sectors within the market
- Specification of which sub-segments were in or out of scope
- Quantification of the make-up and size of each segment
- Desk research into quantity of personnel within each segment, both as staff and as 'customers'
- Desk research into quantity of main meals served within each segment
- Conducting in-depth interviews with a range of senior executives from across the breadth of the industry.
- Verification of meal quantification through interviews and case study compilation.
- Identification of the key drivers behind the future direction and growth of the industry
- Forecasting growth in the number of meals served by sector through to 2028.

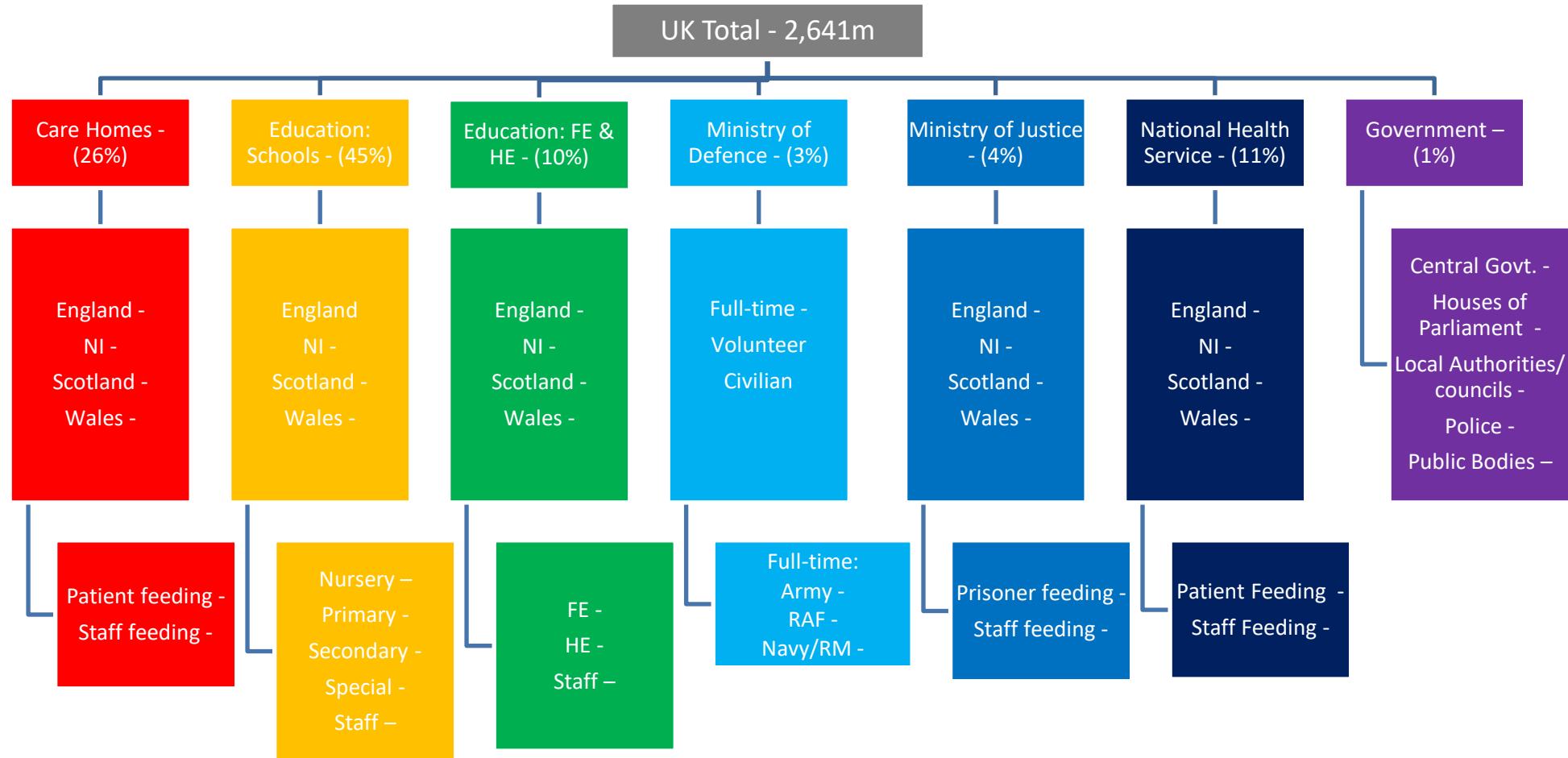


The report has been compiled with the input of senior executive who were interviewed in-depth.

- **Laura Brimacombe**, Bus Dev Director, Sodexo State & AiP
- **Gavin Brown**, Leicester Services Partnership
- **Tom Bushnell**, Program Mgr, Ecolog International
- **Rachel Carter**, Operations Director, Chartwells Universities
- **Sue Cawthray**, CEO, Harrogate Neighbours
- **Ian Crabtree**, MD, Accent Catering
- **Andrew Etherington**, Consultant
- **Kerry Ford**, MD, Chartwells Universities
- **Julian Fris**, Consultant, Neller Davies
- **Ian Gribben**, Account Director, Sodexo Universities
- **Mike Haslin**, CEO, TUCO
- **Andrew Hutchison**, Hutchison Catering
- **Glyn Ingram**, MD, Govt. Services, Aramark
- **Andy Jones**, Health/NHS consultant
- **David Mulcahy**, Food Innovation & Sustainability Director, Sodexo
- **David Oliver**, Head of Catering, HMPPS
- **Brad Pearce**, Chair, LACA; CATERed
- **Neil Porter**, Operations Mgr, BAM Construct
- **Neel Radia**, Consultant, Chair NACC
- **Phil Rees-Jones**, Chair, TUCO; Cardiff University
- **Brian Robb**, Chair, HCA; NHS Lothian
- **Phil Shelley**, Chair, NHS Food Review
- **Nigel Shepherd**, Food Commodity Lead, Team Leidos / TVSSC
- **Mark Taylor**, Bloom Foodservice, NACC
- **Laura Tighe**, MD, Health, Care & Retirement Living, Elior
- **Nick Vadis**, Culinary Director, Compass
- **Sarah Wren**, CEO, Herts Independent Living



# The UK Public Sector Catering Landscape and Meal Volume Quantification 2023 – the report outlines the volume breakdowns for the below:



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- There are just under 17,000 Care Homes across the UK providing a total bed count of over 543,000.
- Using Government occupancy rate statistics averaging at 81.8% across the UK, this provides a total occupancy figure of 444,212.
- Care home staffing across the UK is calculated at 696k.

Total Care Homes	UK	England	Wales	Scotland	Northern Ireland
Total	16,989	14,535	1,024	1,025	405
Residential Care Homes	11,960	10,496	767	523	174
Nursing Homes	5,029	4,039	257	502	231

Care Home Population	UK	England	Wales	Scotland	Northern Ireland
Total	444,212	374,382	23,276	34,104	12,450

Care Home Staff	UK	England	Wales	Scotland	Northern Ireland
Total	696,340	595,000	29,860	53,080	18,400

Sources: carehome.co.uk; ONS. Data from 2022. Includes Channel Islands and Isle of Man; PHS (Scotland) and DoH (N.I.); Skills for Care; Social Care Wales; SSSC (Scotland)

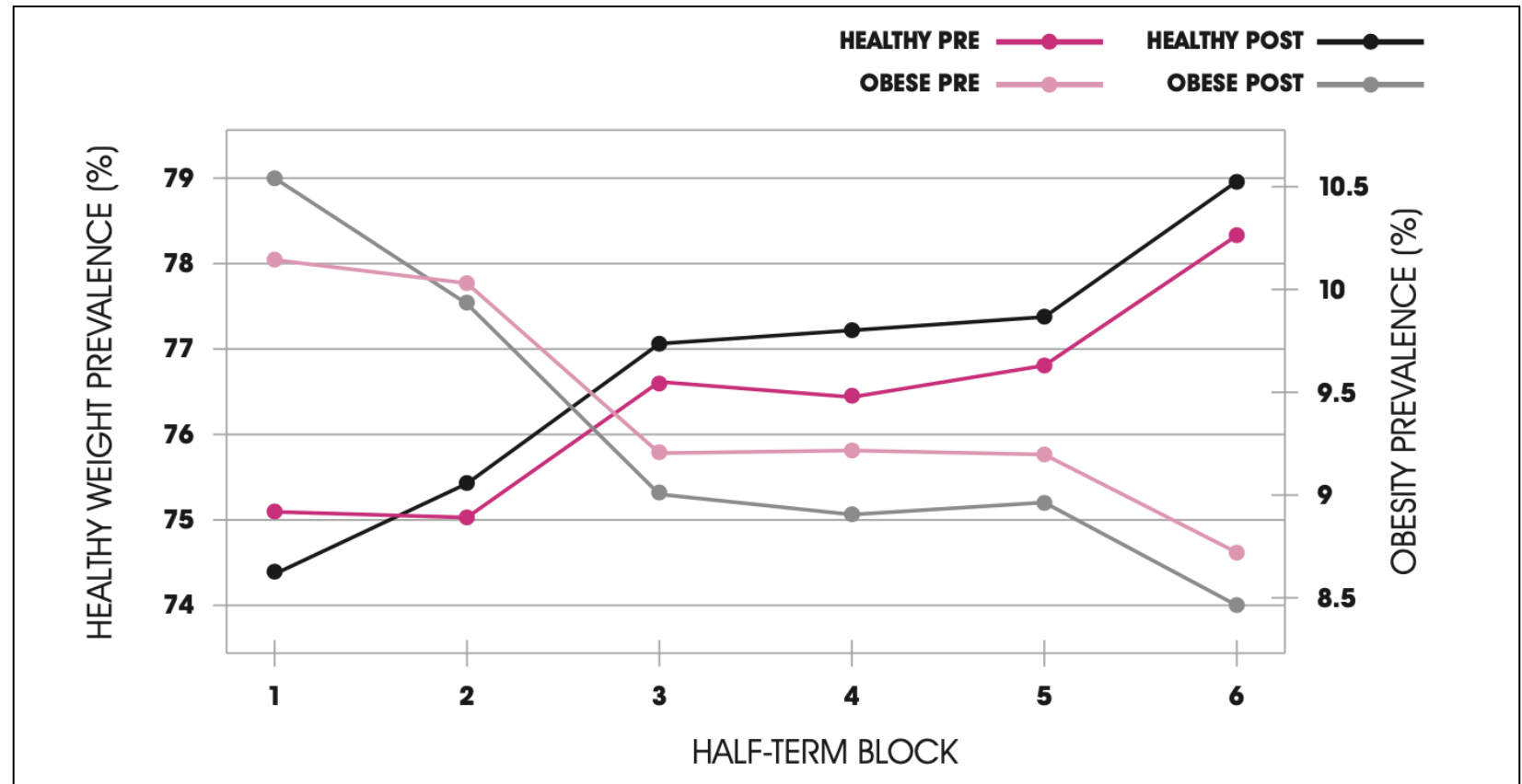
# The Role of School Catering in Supporting Healthier Eating

- Child Poverty Action Group conducted analysis of the results of the introduction of UIFSM, considering the impact of proper, healthy meals provided to all KS1 pupils, and found that prevalence of Obesity and Healthy Weight both moved in the right direction.
- These results supported the theory that UIFSM would improve healthier outcomes.

Trends in healthy weight and obesity prevalence, over the school year, before and after the introduction of UIFSM –

- Obesity prevalence decreased from 10.5% to 8.5% post UIFSM
- Healthy Weight prevalence increased to 79% post UIFSM, from 74.5%

N.B. The data source used by CPAG is the National Child Measurement Programme. Healthy weight and obesity prevalence shown in this chart are the means, across schools, of the within-schools proportions healthy weight and obese (accounting for age and sex of children measured) for schools measured in each half-term block by pre-UIFSM (2009-2014) and post-UIFSM (2015-2018).



Source:

<https://cpag.org.uk/sites/default/files/files/policypost/CPAG-Poverty167-Universal-infant-free-school-meals-Oct-2020.pdf>

# National Health Service: Meal volume estimates for Patients and Staff – 2023

- The annual meal volume is estimated at over 284 million across the NHS in 2023. This is split 47%:53% between patient and staff feeding, with the slight skew to the latter reflecting the NHS’s status as the largest employer in the UK (and in Europe too).
- There is a total of 1,226 hospitals in the UK, with an average of over 4,400 meals served every week, with the higher figure of 5,100 in England a consequence of larger hospitals.
- Meal volume calculations are sensitive to bed occupancy rates, which took a major dip during the Covid-19 impact but have now returned to pre-pandemic levels.

PATIENTS						
Nation	No. of Hospitals	Bed Count - Total	Occupancy rate	Total patient bed days	Assumed meals per day	Total meals per annum
England						
NI						
Scotland						
Wales						
<b>UK</b>						

STAFF				PATIENTS & STAFF COMBINED			
Nation	Staff No. (FTE)	Workdays	Assumed meals per day	Total meals per annum	Meal volume total Residents & Staff	Total annual meals per Hospital	Average weekly meals per Hospital
England		235	0.4				
NI		235	0.4				
Scotland		235	0.4				
Wales		235	0.4				
<b>UK</b>		<b>235</b>	<b>0.4</b>				

Notes: The annual NHS total meal volume calculations are based on the occupancy rate estimates of the total bed count multiplied by an assumed average number of meals per day. This figure has been set at 2.33 and is based on a typical 6-day stay with only one meal included on the first and last days of this average stay period and three meals a day over the intervening period; \* In England, an additional calculation has also been made to cover some meals provided to day-only patients; Staff estimates are based on full-time equivalent numbers and an assumed 0.4 meals a day consumption over their 235 annual workdays.

Sources: NHS England, NHS Digital, Government statistics for NI, Scotland & Wales and FutureFoodservice analysis



# The Future of Public Sector Catering Report



Report is now available.

c.100 pages of detailed data, in-depth research, considerable analysis and future forecasts.