



WELCOME TO THE SPRING EDITION OF MPP'S SEASONAL MARKET GUIDE FOR FOOD BUYERS AND CATERERS. OUR QUARTERLY MARKET REPORTS ARE DESIGNED TO GIVE YOU THE KEY INFORMATION YOU NEED TO HELP YOU MAKE BETTER BUYING DECISIONS.

Whether it's facts you want to have at your fingertips, such as current produce availability, or information that you want to keep at the back of your mind, such as consumer trends or new regulations, we hope that you'll find it here.

In this spring report we bring you the latest news from the food markets, and

the factors influencing prices at this time of year. We also focus on one of the most important changes in the rules affecting food procurement in recent years: the UK government's introduction of a "Balanced Scorecard" to evaluate suppliers' offers. This encourages buyers to look

for a much wider concept of value, not just lowest cost.

At MPP, we're all about getting the keenest prices and the best value for our customers. Call us for the latest prices and availability of a wide range of produce: **0844 247 7792**

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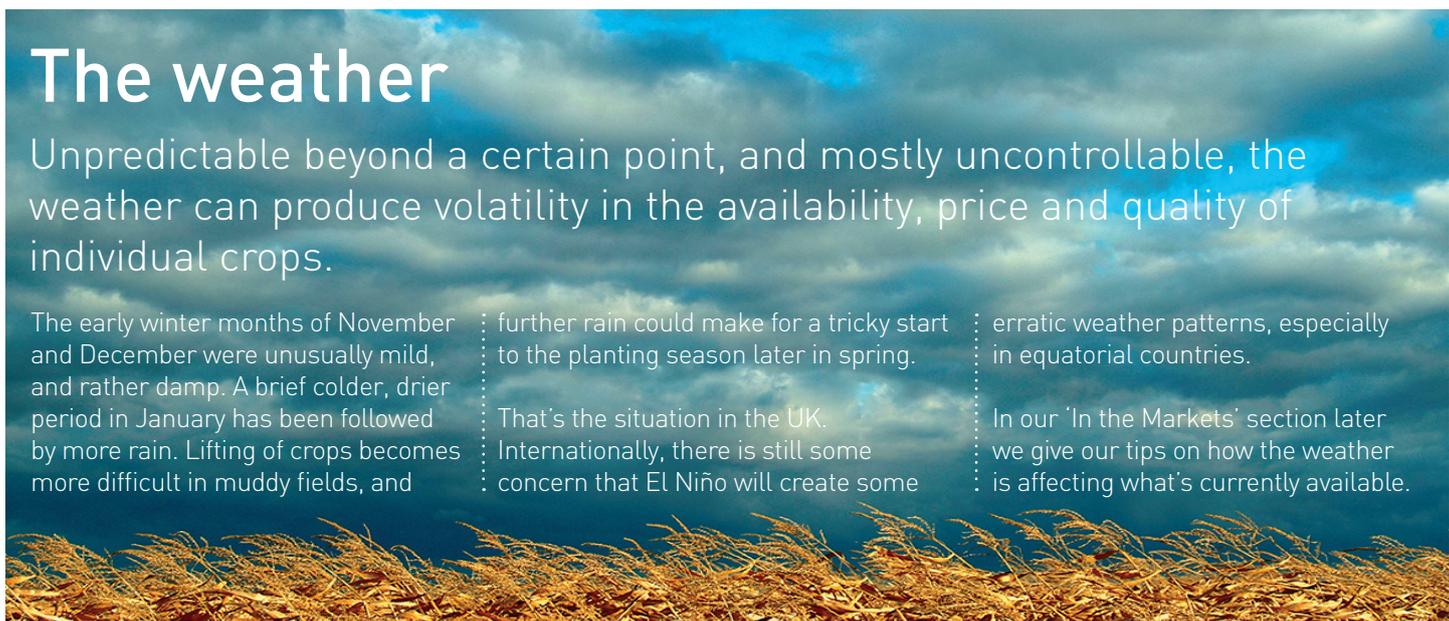
THE BIG PICTURE

The economy

The big economic story in recent months has been the fall in global oil prices and its effect on producer costs and consumer demand.

The effects are still working their way through the world's economies, but the expectation is that inflation in general will remain very low this year. As has been the case for some time, this overall price stability is helpful for

longer term menu planning. There are, however, some upward pressures on food service operating costs resulting from the introduction of the National Living Wage from April 2016.



The weather

Unpredictable beyond a certain point, and mostly uncontrollable, the weather can produce volatility in the availability, price and quality of individual crops.

The early winter months of November and December were unusually mild, and rather damp. A brief colder, drier period in January has been followed by more rain. Lifting of crops becomes more difficult in muddy fields, and

further rain could make for a tricky start to the planting season later in spring. That's the situation in the UK. Internationally, there is still some concern that El Niño will create some

erratic weather patterns, especially in equatorial countries. In our 'In the Markets' section later we give our tips on how the weather is affecting what's currently available.

Consumer trends

We try to help our clients to stay up to date with the latest trends in food service and catering. As we are continually watching the markets, we're well placed to pick up what's attracting interest, and what's losing its appeal. Here's our quick summary of what's trending in spring 2016:

Cooling down	Heating up
Avoiding fat – some fats are good	Avoiding sugar – a cause of obesity
Traditional steakhouse	Posh barbecue concepts
Coconut water	Artisan soft drinks
Kale and dark greens	Locally grown and regional produce
Quinoa and gluten-free foods	Historical grains such as spelt
Fusion concepts, foams and froths	Home-made healthy fast or comfort food

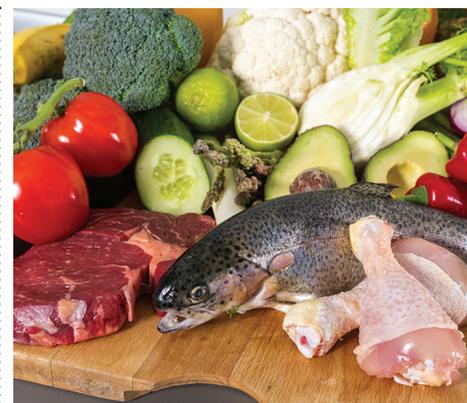
Other trends to watch out for

- Authentic ethnic cuisine, especially African and Middle Eastern
- Exploration of unusual and complex spices
- Artisan butchery and nose-to-tail use of all meat cuts including offal
- Fresh and house-made meatballs and sausages
- Unusual meats in burgers and street food
- Premium bone broths
- Emphasis on provenance
- Emphasis on sustainability throughout the supply chain

IN THE MARKETS

Fresh vegetables, salads and fruits (in season or from store)

Potato	Good quality available from stored supplies
Carrot	Good quality UK carrots in season now, but wet ground might affect supplies later
Parsnip	Good quality UK parsnips in season now, but wet ground might affect supplies later
Swede	Still growing well in Scotland, good supplies
Broccoli, cauliflower	Good quality available from Spain
Cabbage	Red, white and savoy from UK stores still available; green is in good supply and high quality, as are spring cabbage and kale
Onions	Last year's drought in Spain has affected supplies of large onions but good quality yellow and red onions available from Holland, and shallots from France
Aubergines, courgettes	Good quality available from Spain
Peppers	Limited availability but good quality from Spain: chillis in good supply
Celery	Good quality available from Spain
Avocado	Israeli supply is good
Tomatoes	Recent cooler temperatures have reduced Canaries supply
Lettuces	Recent cooler temperatures will reduce Spanish supply
Spinach, rocket	Italy still producing good quality
Apples	Good Golden Delicious, Braeburn and Grannies from France
Stone fruits	Good peaches, nectarine and plums coming in from South Africa
Citrus	Oranges starting to come from Egypt, with Spanish lemons and Moroccan clementines, plus Brazilian limes
Bananas	High temperatures in Ivory Coast and Costa Rica are keeping supplies plentiful
Grapes	Red and green good from S Africa, and still good availability from South America
Mango, figs	Good quality from Brazil
Ginger, garlic	Coming from China – some doubts about quantity of Chinese supply this spring



Meat, poultry and fish

There is a strong continuing trend of rising demand for animal protein in developing countries, which means that the price of meat and fish is unlikely to fall this year.

There are cyclical variations that might affect particular types of meat or fish, as well as incidents such as outbreak of diseases that could disrupt supply.

This is a problem that we see increasingly in fish farming – for example the blighting of the Norwegian salmon harvest by sea lice. As a result, salmon prices are already rising.

The price of prime beef is also expected to stay firm this year, and there are interesting developments in demand for less mainstream types of meat or poultry. Reflecting some of the trends we've highlighted above, we expect there to be greater interest in named and rare breeds, in grass-fed animals, and in smoked, cured, or very aged cuts of meat. In addition to continued strong demand for chicken, we expect the following to be more present in the market:

- venison
- kangaroo
- pork belly and pig's head
- rabbit
- duck and ostrich
- pheasant and grouse

Some of these, in particular duck and venison will find their way into upmarket versions of burgers and kebabs.

HEADS UP

New Education Programme for Meat Buyers

AHDB Beef & Lamb have launched a Meat Education Programme to help develop skills in the red meat supply chain. It's a free, online educational resource that is aimed at anyone working in the meat industry, from

butchers through to buyers, processors and marketing staff.

For more information and to register, go to: www.qsmbeefandlamb.co.uk/mep

Food awareness days March, April and May 2016

MARCH 7-13: BRITISH PIE WEEK

MARCH 14-20: NUTRITION & HYDRATION WEEK

We've written about these issues – good to see some more awareness-raising

MARCH 19: NATIONAL POULTRY DAY

MARCH 24-30: NATIONAL BUTCHERS WEEK

APRIL 7: WORLD HEALTH DAY

The World Health Organisation's annual focus on a global health problem -targeting diabetes this year
<http://www.who.int/campaigns/world-health-day/2016/event/en/>

MAY 8-14: BRITISH SANDWICH WEEK

<http://www.sandwich.org.uk/index.php/306-british-sandwich-week-2015/510-british-sandwich-week-resources>

MAY 14: WORLD FAIRTRADE DAY

<http://wfto.com/events/world-fair-trade-day>

MAY 18-24: NATIONAL VEGETARIAN WEEK

<https://www.nationalvegetarianweek.org>

MAY 14-22: REAL BREAD WEEK

http://www.sustainweb.org/realbread/national_real_breadmaker_week/

Rules & Regs

Do you understand the Balanced Scorecard?

The government introduced the concept of a Balanced Scorecard in 2014 to help public sector food buyers get better value from their suppliers. Many private sector caterers and food contractors have adopted it too.

The basic idea is to move away from buying only on the basis of lowest cost. The government wants food buyers to think about value for money in a much wider sense, on the grounds that lowest cost in the short term often involves greater cost in the longer term, and can therefore turn out to be a false economy.

Examples of false economies resulting from only buying at lowest cost include low take-up of meals in schools, and hospital patients leaving unappetising food uneaten.

The Balanced Scorecard is a tool to help buyers assess suppliers' offers against five categories of service criteria: production, health and wellbeing, resource efficiency, socio-economic considerations, and quality of service.

This is what it looks the Balanced Scorecard looks like in headline terms:

Quality and Value				
Cost	Service			
Production	Health & Wellbeing	Resource Efficiency	Socio-economic	Quality of Service
Requirements/Award Criteria Categories				
Supply chain management	Nutrition*	Energy*	Fair & ethical trade	Food quality
Animal Welfare*	Food safety & hygiene	Water*	Equality & diversity	Customer Satisfaction
Environment	Authenticity & traceability	Waste*	Inclusion of SMEs	
Variety & seasonality			Local & cultural engagement	
			Employment & skills	

* = in current GBS

The government has published more information on how to operate the Balanced Scorecard at: https://www.gov.uk/government/uploads/system/uploads/attachment_data/file/419245/balanced-scorecard-annotated-march2015.pdf

Be prepared for the Living Wage

The introduction of the National Living Wage is expected to put pressure on food industry operating costs. It becomes law in April 2016, but some recent surveys show that many employers have not yet taken steps to introduce it. The National Living Wage brings an addition to the National Minimum Wage for workers aged 25 or over, with a 50 pence increase in hourly

pay taking it to at least £7.20 per hour. Many employers are also still unaware that 'salary sacrifice' schemes used to avoid income tax and national insurance could result in them inadvertently breaching the new minimum income level. The National Minimum Wage is the hourly rate paid after any income 'sacrifice', rather than the headline pre-sacrifice rate.