



food sales increase by 20% in each of the last two years," he says.

### Food provenance

Two key features of Strategy Works research are traceability and sustainability, and Greaves confirms this trend. "We have relaunched our chip products as 'Best of British'," he says. "All our chips will be made from British-grown seed potatoes, planted in British fields by British farmers and manufactured in British factories. Provenance is vital - we're the only potato manufacturer within the UK to own a seed-development business."

Young's Seafood has a similar initiative from boat to plate, and sustainability of fish stocks is central to its strategy. Milsted reports that Young's no longer sources cod from the North Sea. The company has just launched Basa, a new fish species and member of the catfish family, which is similar in texture to cod and haddock. As a farmed fish, stocks can be managed and it is totally sustainable.

Meanwhile 3663 supplies Whites, a brand exclusive to the company and one that delivers on the promise "We've started, so you can finish" through a range of part-prepared products with provenance.

### More local sourcing

At Marston's Pub Company, which has an estate of 1,700 pubs, catering and development manager Ben Bartlett confirms the trend towards more local sourcing, particularly for gastropubs. "There is greater opportunity to source local produce - and this is what the customer is demanding," he says.

Bell of 3663 confirms this trend. "We are rolling out our UK local-sourcing initiative: 50%

## ***We have to push manufacturers and producers to supply information. The FSA should do more to encourage traceability***

of the country is already covered and the remainder will have access to locally-sourced products by the end of 2007," he says.

But Bartlett says manufacturers could do even more on traceability. "As a company we champion traceability, but have to push manufacturers and producers to supply information," he says. The Food Standards Authority (FSA) should do more to encourage traceability."

### Emerging trends

3663 has placed a strong focus on preparing for the ban. Bell reports: "We have developed menus and food offerings to introduce food to a pub for the first time or enhance an existing menu for those improving their offering as a result of the smoking ban."

McCain's Greaves believes the trend towards family dining will accelerate. "Our research identifies that smokers don't tend to be big diners - pubs will have to substitute that clientele," he maintains. "Family dining is a positive solution because it's fairly easy and profitable."

Pullen says many pubs will become more family-friendly and Bernard Matthews intends to target its Fine Dining range at this sector to capitalise on opportunities.

Bartlett would have liked to see a faster pace of development leading up to the introduction of the ban in England.

He says: "The industry is slow in adapting to changing trends. There will be a big impact on trade, such as a shift towards female customers and families. The industry should plan more al-fresco dining opportunities. The smoking ban should be seen as a great opportunity to develop the offer."

Jury's Doyle Hotel Group food buyer Andrea Wehrley believes that it is well placed to forecast the demand in England, having already experienced the introduction of the smoking ban in Ireland.

Wehrley says: "When smoking was banned in Ireland two years ago, it increased the numbers of customers coming into pubs. We're buying in more food to cope with potential demand."

### Ahead of the game

Clearly, some are better prepared than others for the introduction of the smoking ban, but what looks certain is that the traditional pie-and-pint pub offering will quickly be displaced by healthier menu options appealing to a broader market that targets families.

Those who recognise the significant convergence of the impact of the smoking ban with healthy-eating and food-provenance market forces will be able to establish first-mover advantage. ☐

## **Marketing consultancy**

**The Strategy Works is a strategic marketing consultancy specialising in original business research and the enhancement of B2B sales processes.**

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