

TUCO South Eastern Regional Meeting

Thursday 9th September 2021 at 02:00 pm via MS Teams

MINUTES

Attendees:	Manish Shah [Chair]	King's College London
	Jacqui Beazley	LSE
	Graeme Collie	South Essex
	Judith Hoyle	TUCO
	Hayley Lowes	Kent
	Sarah McLoughlin	TUCO Academy
	Nicola Mellor	TUCO
	Paul Stigter	BD Group
	Matt Tebbit	Reading
	Darren Tyers	Essex
Apologies:	Alison Armitage	Harlow College
	Rob Grimer	Kent
	Kamil Khoury	Imperial
	Sam McTrustery	Bedford
	Jemma Morris	Royal Holloway
	Phil Rees-Jones	Cardiff (TUCO Chair)
	Matthew White	Reading
	Wendy Wenborn	Anglia Ruskin

1. Welcome and Apologies

Apologies are as above. Manish welcomed new member Paul from the BD Group.

2. Presentation by Phil Kaye and Tony Price of Dr Oetker/Chicago Town

A copy of this presentation is included with the Minutes.

3. Member Updates

LSE

Jacqui is now back at work full time with most of the outlets either open or about to open. All students have been told that they must enrol in person even though some of the teaching will be done online. Some of the Chinese students have been having problems with visas but regardless of that they have been told that they must attend in person. All of the One Way systems have been taken away and tables are back to full capacity. Some of the salad bars have been taken away and self-service has been replaced by staff serving the students. Events are back on the programme.

Sustainability issues and plant-based vegan offerings are high on the agenda. They are committed to 60% plant based until next year and they also have their vegan café. Meat will still be served but much less of it and all counters will display their vegetarian or vegan items first. Red meat is only served two days per week and this is mostly chicken or pork. They are adopting a 'Nudging' rather than a 'No Meat' approach. They have an offer whereby if you purchase nine vegetarian or vegan dishes you get the tenth one free. Welcome Week will last for three weeks rather than just one. Lectures normally held in the largest lecture theatres will be done online but those held in the smaller theatres will be carried out in person.

South Essex

Graeme reported that they are back to normal at the college as far as students are concerned. Teaching spaces have been closed and more staff are working from home. They have been experiencing problems with their sandwich suppliers. There has been some opposition to vegan offerings and chicken nuggets are a big seller but they are also offering vegan nuggets. They also have competition from the high street, which is nearby. It has proved very challenging to try to change student eating habits. Some members of his team have moved on during COVID.

Reading

They are adapting to Menus of Change and the 24 principles of it with 'Plant Forward' rather than 'Plant-Based'. They have been having some problems with ProcureWizard. Referring to the earlier presentation, Matt stated that they do not have Chicago Town pizzas on site.

BD Group

Paul asked Jacqui about the LSE Loyalty Scheme. They are also looking at the packaging of their items and are focusing on good quality food which children are going to benefit from.

King's College

Manish reported that all safety measures have now been removed. All staff are back at work and all outlets are open as from Monday 13th September. There is a major project taking place by the Council to turn The Strand into a pedestrianized zone. The Catering Team are back at work 5 days a week but other staff are still hybrid working. There is a requirement to be in work for a minimum of one day per week for people such as IT staff. They are working on the carbon footprint of their menus, aiming to have 70% of food options to be plant-based and are looking to be completely carbon-neutral by 2025. They are also aiming to have 80% of their food made in-house. Manish is looking to recruit a new Executive Chef and stated that the quality of candidates has been very good.

4. Procurement Update

The sandwich manufacturers are having issues as there are problems with production at their bread supplier, Roberts Bakery. This is having an impact, particularly with Real Wrap. Kim will be advising on any secondary suppliers. One of our members has had no deliveries at all from Real Wrap. Contingency supplies are not enough to cover all the orders. More issues are anticipated and this may affect chilled supplies such as salads etc. The Sandwich framework has been extended to 30th June 2022 and Kim is currently working on the strategy documents for this. Volunteers are needed to sit on the Tender Working Party for Sandwiches.

The agreement for the Delivery App is to be in place by the end of August for members to start using soon. Temporary Staffing – the final award was made last week with new suppliers on there.

Food Waste Management is extended until the end of October and is out to tender at the moment with 9 Lots on there.

On Soft Drinks, the new Account Manager for Coca Cola is Steve Bradley and his contact details are on the TUCO website.

Catering Light Equipment will run into 2022 and work will start on this soon.

Alcohol now runs until January 2023.

Milk and Bread has been extended until 24th January 2022 and Hannah is working on the documents.

The EPOS System framework has been awarded under a DPS and has four suppliers on there. A re-submission from The Access Group is being evaluated at the moment.

The Vending agreement is also a DPS and there are two new suppliers on there – Ideal Vending and Fair-Trade Vending.

Kitchen Equipment Maintenance has had two new suppliers added to it.

On the Catering Innovation and Concept Solutions (CICS) the Starbucks Legal Team are reviewing the documents and Hannah is also working with COSTA on this.

Meat and Poultry is being re-tendered and is at SQ stage at the moment.

On Temporary Structures, Nicola reminded members that bookings for things such as marquees are set to double next year. All price changes are in the Pricing Newsletter.

DipChem, Meat and Poultry and Vegan and Vegetarian have all seen price increases.

On the Grocery Frozen and Chilled there is likely to be some hefty increases in January.

Hot Beverage there will be price increases on the beans but we will look at this again in December.

Brakes have re-listed some Linda McCartney products.

Simply Lunch have changed from Day 1 to Day 3 deliveries.

The New Product Development section of the website where members can request samples then give feedback has been very well received.

5. TUCO Academy Update

The Academy is starting to hold face to face courses (onsite at universities for teams but not at TUCO HQ) and recent venues have included Staffordshire, RNCM and St Mary's Twickenham. Webinars online for full day courses will still be available – check the website for upcoming courses but we can add ones you need if you prefer not to have face to face just yet. We will visit onsite and send you a risk assessment for COVID ahead of the session.

The following courses are available:

- Level 4 refresher course
- Level 2&3 Allergens
- Level 2 & 3 Food Safety
- Level 2 & 3 HACCP
- Level 2 Customer Services
- Change Management
- Level 2 Healthy Foods and Special Diets (Nutrition)
- Leadership

- Level 1 award in awareness of first aid for mental health (RQF)
- level 2 award in first aid for mental health (RQF)
- level 2 award in first aid for youth mental health (RQF)
- Level 3 award in supervising first aid for mental health (RQF)

We're also working on:

- Menu Engineering
- Mastering your motivation
- Presentation Skills
- Mentoring
- Worklife after furlough (supporting managers)
- Customer Service (tailored to individual requirements from institutions)

We have a Calorie Labelling webinar in the works, 3 Food Trends and a Youth Nutrition one coming up (FOC). Veganuready (Innovation Day 2) will take place on the 11th of November – another full day of plant-based showcases from suppliers with some guidance on menus and recipes.

Two new plant based mini study tours with Veg Express are in the pipeline at the end of the year, one in Newcastle and one in London. We'll be looking for one plant-based champion from each institution and there are several places available, price point will be @£99 with an overnight stay.

A face-to-face Winter Conference is being organised. Early December is the likely timing (exact date TBC) and the theme will be food trends, we will launch the new Food People 'Food Trends' booklet. Hoping to have an opportunity for a mini exhibition from suppliers.

6. Board Update

Manish explained that there is very little to report on this as the Board have not met for several months. Their next Meeting is due to take place on Thursday 16th September.

7. Sustainability

Matt explained that the Sustainability Group had met earlier this week. Chair of the Group David Nuttall would be standing down and Matt volunteered to take over the role. They had been talking about different certifications and the Menus of Change had been the most inclusive so we are now reaching out to the Culinary Institute of America to work with them on this along with the Menus of Change Universities Collaborative Research. It covers both planetary health and human health. Matt believes that it is important never to lead with a healthy theme – always lead with a taste theme. We are also now working on a carbon labelling scheme.

8. Any Other Business

Nicola advised the group that TUCO Contracting Executive Carys Hopcyn, who had assisted many members with their mini-competitions, has now left TUCO and that we will be recruiting a replacement.

9. Date of Next Meeting

The next meeting will be a morning meeting some time in early December.



PIZZA TO GO!



Pizza To Go

Phil Kaye - Business Account Manager

Tony Price - National Field Sales Manager



Food to Go ambition for pizza

An enabler for operators to successfully serve great FTG & Takeaway pizza!

NATIONS FAVOURITE PIZZA BRAND



Think outside the pizza box to create products that bring a **Real Taste of Chicago** to our pizza loving audience **wherever and whenever** they desire it.

- UK's 68th largest brand +5 places
 - Worth £136m up 6%
 - 10.5m shoppers
 - 36% HH Penetration



The UK Market is set to recover 70% of 2019 Value of £91.3bn in 2021



The total eating out market declined by **-47.8%** to just £47.7bn in 2020, with just 11.3 weeks of normal trading.



The market is set to grow by **+33.4%** in 2021 with closures at the beginning of the year hampering recovery for predominantly dine-in channels, with an expected 25 weeks of restriction-free trading.



Channels with more focus on **takeaway** - fast food, coffee shops and sandwich & bakery - will lead recovery in 2021 with these lower ticket channels well placed to capitalise on consumers seeking out lower ticket meal solutions.



The food to go market is forecast to grow by **+40%** in 2021, returning to the market value around 2019

Despite the impact of Covid 19, the Food to Go market is set for a swifter recovery than the total eating out market

Advantage of to-go

- ✓ Low ticket option
- ✓ Limited contact
- ✓ Speed & Ease of Service



FTG remains a cheaper alternative to dining out, and a necessity for many



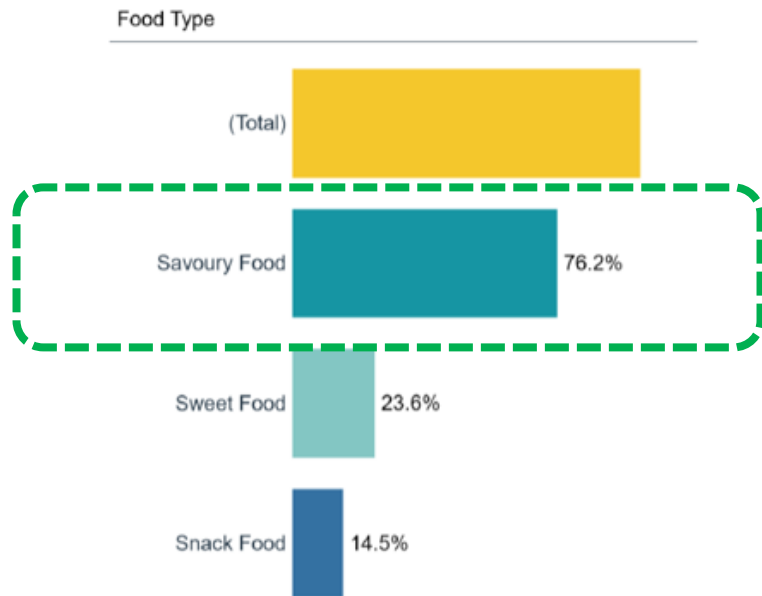
Appeals to consumer preference for contactless and minimising time within operators as its grab and go



Consumers are expected to re-gain confidence. Lunch fatigue expected to set in, with consumers bored of in home options, looking for exciting to-go options.



Food to go continues success as restrictions ease...



- At 76%, savoury food drives the vast majority of Food To Go sales. Options that are convenient and easy to eat are favoured.
- 1 in 3 foodservice occasions have been consumed on the go
- Although the majority of food to go consumers do not have a dietary requirement, almost 1 in 3 are flexitarian. Additionally, 7% are vegetarian.



Pizza Market

The out of home pizza market continues to be in positive growth **+9.1% YoY**, driven by more pizza trips, and higher volume per buyer



Total OOH Pizza:

£2.5bn

£ Value

+9.1%

44.7%

UK Households

-8.5%

8.8

trips

+14.7%

£8.46

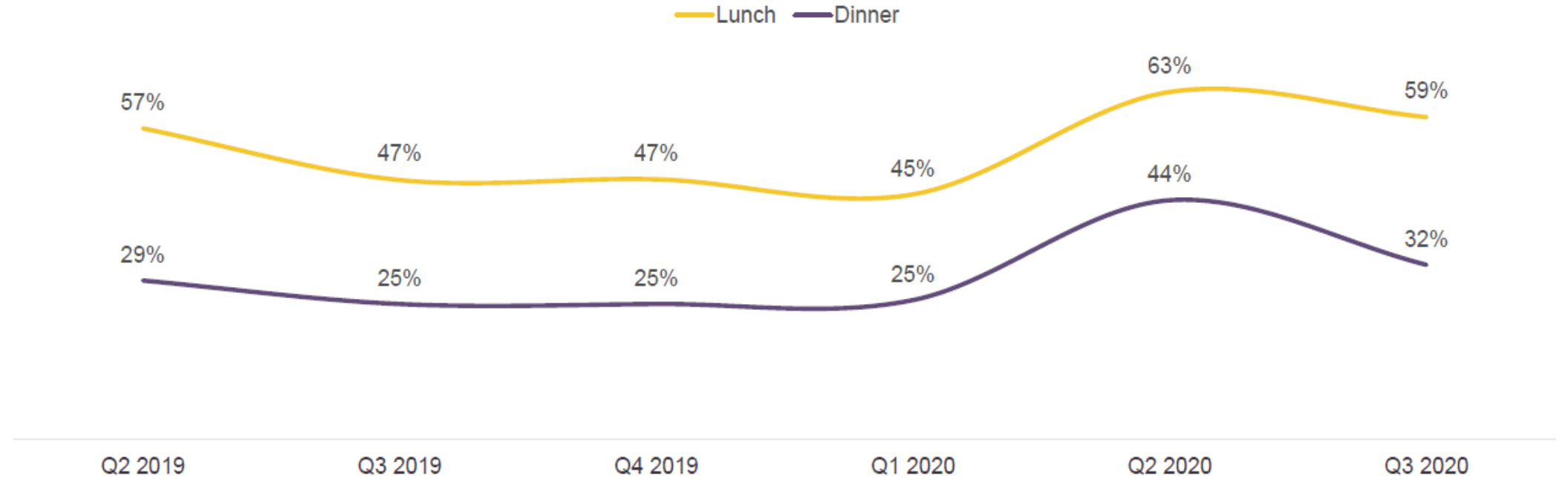
spend per trip

+2.7%



2020 was a summer of pizza on the go...

% of Pizza visits that were consumed on the go (Lunch & Dinner)

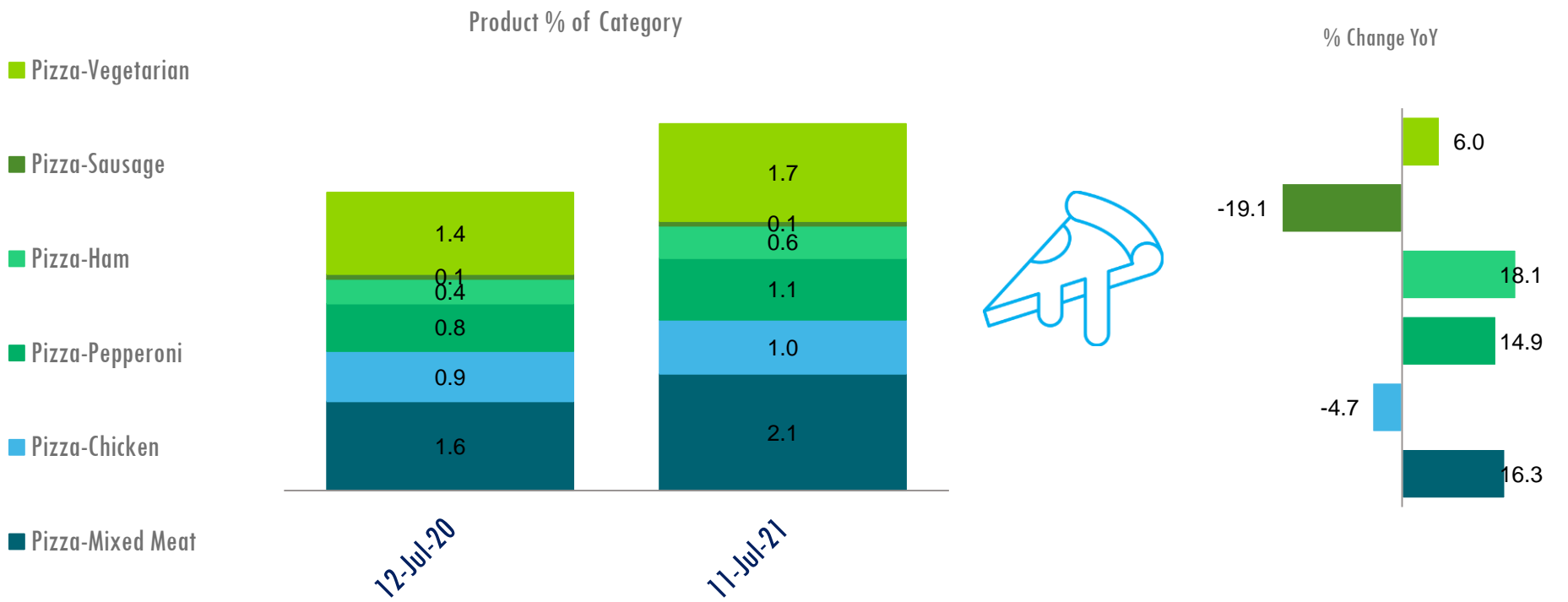


- In the summer of 2020 in the peak of restrictions , 63% of pizza visits were at lunch time on the go, as it spiked dramatically, exceeding the spike of outdoor eating the year previous
- Pizza has been a go-to choice for all demographics due to portability and ease of consumption on the go.



Pizza Flavour

Mixed meat pizzas have been the biggest contributor to growth within the pizza market, followed by vegetarian & pepperoni

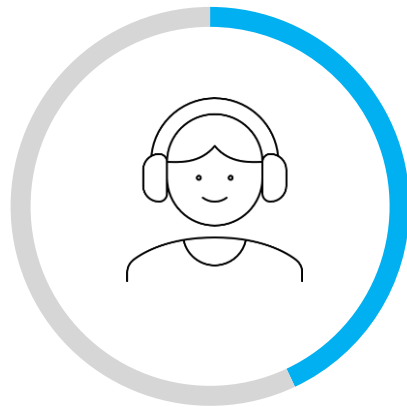




Pizza Demographic

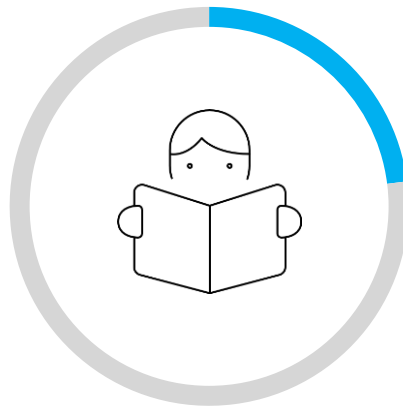
A typical pizza slice buyer in 2019 was a younger, working class person, since Covid this has shifted even further towards young people, particularly students and younger working parents

Under 35



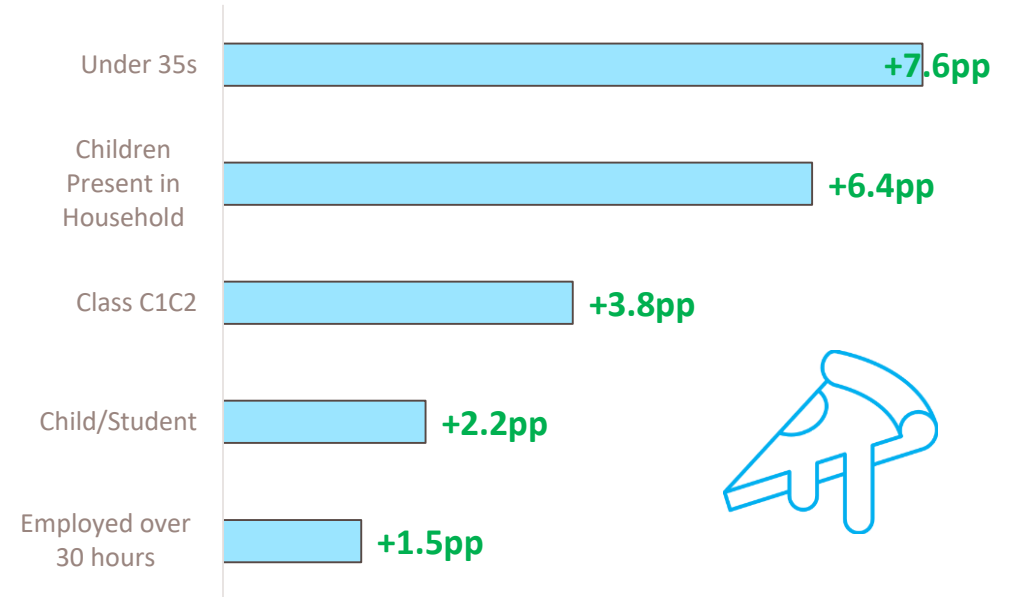
43%

A student or not working



23%

Pizza Slice Buyer Share: pp change vs. 2019





Deeper understanding of behaviours

Operator

- Reduced kitchen touchpoints
- Simple, consistent options for reduced staffing levels
- High quality products to deliver a positive experience
- Additional revenue stream opportunities (Takeaway, Delivery, FTG, new dayparts)
- Profitable simplified menu choices

Consumer

- Hygiene & safety reassurance
- Service & overall experience
- Quality & value for money
- Local venues & home delivery
- Financial concerns & disposable income
- A desire for familiarity

Pizza

- ✓ Universally popular
- ✓ Takeaway, delivery & FTG
- ✓ Meets multiple day parts
- ✓ Wins on speed & ultra convenience
- ✓ Meets dietary requirements
- ✓ Wins on taste, quality and consistency



PIZZA TO GO!



PIZZA TO GO!



Product Portfolio



OUR UNIQUE

TAKEAWAY
DOUGH

Compelling Product – Core range



- Core standard range
- Best sellers



- Drive incremental occasions
- Opens more day parts
- Attracts a broader audience



GOOEY MESSY
VEGAN
GOODNESS

Compelling Product – Vegan

Suppliers, retailers and operators must be prepared to cater for **1 in 6 UK adults** and **3 in 10 18-34** year olds that intend to follow vegetarian or vegan diets in the future.



- ✓ Incremental sales through targeting more occasions
- ✓ Meets needs for vegan, vegetarian and flexitarian diets
- ✓ Pizza is a great fit for growing the dirty vegan trend
- ✓ Consumers looking for specific dietary needs are less price sensitive



PIZZA TO GO!



PIZZA TO GO!



SELF SERVE



Exclusive Branded Self Serve Packaging

Quarter Pizza



225 x 190.5 x 0.85mm

- Dedicated self serve quarter slice holder
- Perforated self serve bag with fully branded cardboard sleeve to protect the pizza
- Allows the pizza to breathe while retaining freshness
- Can be displayed flat or upright
- Achieved 3hrs hold time
- Artwork assets for ingredients / Allergens – “Natasha’s Law” requirement Oct 21

Full Pizza



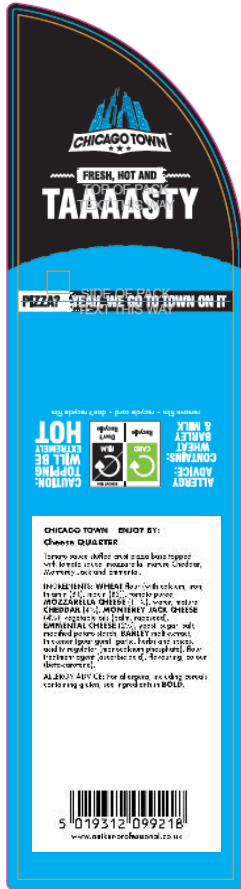
290 x 290 x 35mm

- 100x self-serve pizza boxes per case
- Exclusively designed to hold pizzas in hot equipment
- Cardboard with film to allow visibility of cooked pizza
- Allows the pizza to breathe while retaining freshness
- 3 hour hold time



PIZZA TO GO!

Natasha's Law



Sticker artwork for both quarter slice & full pizzas in the following flavours, available with and without barcodes:

- Cheese
- Pepperoni
- Magnificent Meat Feast
- Chicken & Bacon
- Vegan BBQ Jackfruit
- Vegan Bac'n & Mushroom

These can be loaded into the operators labelling system and used to seal the bag with the label on the BOP and seal the box with the label folding underneath the box.



CHICAGO TOWN ENJOY BY:

Magnificent Meat Feast FULL PIZZA
Tomato sauce stuffed crust pizza base topped with tomato sauce, mozzarella cheese, slices of pork and beef pepperoni, pork meatballs, fennel sausage and smoke flavour ham.

INGREDIENTS: **WHEAT** flour (with calcium, niacin (B3), iron, thiamin (B1)), tomato puree, **MOZZARELLA CHEESE** (12%), water, pork and beef pepperoni (4%) (pork, beef fat, salt, dextrose, spices, sugar, dried glucose syrup, garlic powder, antioxidants (sodium ascorbate, extracts of rosemary), smoke flavouring, preservative (sodium nitrite), spice extracts, smoke), vegetable oils (palm, rapeseed), mini pork meatballs (3.5%) (pork, pork fat, breadcrust), **WHEAT** flour (with calcium, iron, thiamin (B1), niacin (B3)), yeast, salt, tomato paste, dried onions, salt, sugar, spices, garlic powder), fennel sausage (2%) (pork, pork fat, spices), **WHEAT** protein, fennel seeds, sugar, salt, yeast, stabilisers (di- and triphosphates), antioxidant (rosemary extract), spice extract, smoke flavour ham (2%) (pork, water, salt, antioxidant (sodium ascorbate), stabilisers (di- and triphosphates), preservative (sodium nitrite), smoke flavouring, dextrose, spice extract), yeast, sugar, salt, modified potato starch, **BARLEY** malt extract, thickener (guar gum), garlic, herbs and spices, acidity regulator (monocalcium phosphate), flour treatment agent (ascorbic acid), flavouring, acid (citric acid), colour (beta-carotene).

ALLERGY ADVICE: For allergens, including cereals containing gluten, see ingredients in **BOLD**.

5 019312 099270
www.oetker-professional.co.uk

CHICAGO TOWN ENJOY BY:

Magnificent Meat Feast FULL PIZZA
Tomato sauce stuffed crust pizza base topped with tomato sauce, mozzarella cheese, slices of pork and beef pepperoni, pork meatballs, fennel sausage and smoke flavour ham.

INGREDIENTS: **WHEAT** flour (with calcium, niacin (B3), iron, thiamin (B1)), tomato puree, **MOZZARELLA CHEESE** (12%), water, pork and beef pepperoni (4%) (pork, beef fat, salt, dextrose, spices, sugar, dried glucose syrup, garlic powder, antioxidants (sodium ascorbate, extracts of rosemary), smoke flavouring, preservative (sodium nitrite), spice extracts, smoke), vegetable oils (palm, rapeseed), mini pork meatballs (3.5%) (pork, pork fat, breadcrust), **WHEAT** flour (with calcium, iron, thiamin (B1), niacin (B3)), yeast, salt, tomato paste, dried onions, salt, sugar, spices, garlic powder), fennel sausage (2%) (pork, pork fat, spices), **WHEAT** protein, fennel seeds, sugar, salt, yeast, stabilisers (di- and triphosphates), antioxidant (rosemary extract), spice extract, smoke flavour ham (2%) (pork, water, salt, antioxidant (sodium ascorbate), stabilisers (di- and triphosphates), preservative (sodium nitrite), smoke flavouring, dextrose, spice extract), yeast, sugar, salt, modified potato starch, **BARLEY** malt extract, thickener (guar gum), garlic, herbs and spices, acidity regulator (monocalcium phosphate), flour treatment agent (ascorbic acid), flavouring, acid (citric acid), colour (beta-carotene).

ALLERGY ADVICE: For allergens, including cereals containing gluten, see ingredients in **BOLD**.

www.oetker-professional.co.uk



PIZZA TO GO!

Tailored Operator Training & Development



David Wardle
Development chef

Pizza to go
Self Serve Guide



David Wardle
Development chef

Pizza to go
Self Serve Hot Hold



PIZZA TO GO!

Operator Process – Front & Back of House



Choose Your CT Flavour



Freezer to
Pizza Tray



Cook & Probe



Stand; Slice; Bag or Box & Label using branded packaging



Merchandise in Hot Hold with Point of Sale

Back of house – Oven Guidance

Convection



Pizza from
10 Mins+

Combination



Pizzas from
6 Mins+

Accelerated



Pizzas from
4 Mins+

Deck & Conveyor



Pizza from
4 Mins+

Pizza Oven(s)



Pizza from
2 Mins+

Our culinary team can guide on specific timings if operator oven specs are provided



Countertop Flexi serve



3,4 & 5 shelf Flexi serve
3hrs+ in Flexiserve



3hrs+ in standard
3hrs in new Modular units



ECHF600 Heated, Chilled, Ambient Merchandiser



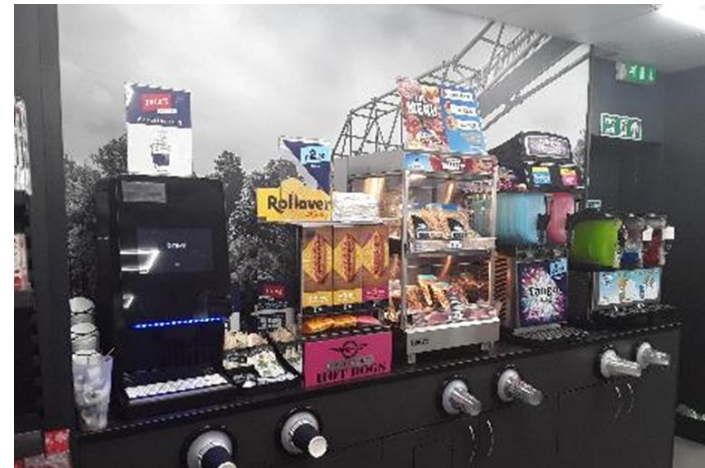
3hrs on standard range
3hrs in Vision air ranges



2hrs+ in UM50



3 hrs for NEW HAD50





NEW Pizza to Go Self Serve Equipment



- The perfect way to display and hold hot, fresh and tasty pizzas for up to three hours.
- Generate incremental grab & go sales while keeping accurate, safe temperature control
- The convected hot air system ensures the pizzas are fresh, hot and tasty for up to three hours
- Holds up to 16 individual pizza quarters at a convenient angle



PIZZA TO GO!



PIZZA TO GO!



PoS Support

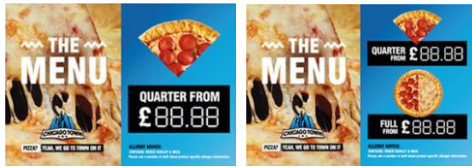


PIZZA TO GO!

Pizza to Go - PoS and Utensils Solutions

PoS PACK

A4 Price Lists x 1 each



1 x A2 Posters x 1 each



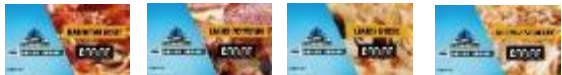
Door Stickers x 1 Shelf Barker x 2 of each



SES x 2 each



SES Tickets x 2 of each (poly prop)



UTENSILS PACK



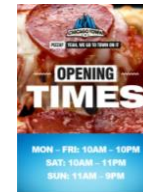
32cm Pizza Trays x 3 each



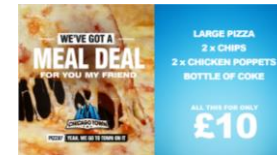
4 inch Pizza Cutters x 1 each

Digi Tool Kit

(examples only)



Social images, gifs, videos, opening times and screen visuals



Ingredients label artwork



Extendable PoS



2m External banners



Feather Flag



Pavement Stand

Bespoke solutions upon request



SUMMARY

- **FTG market continues to grow** – helping recovery through & post CV 19 impact, estimated to grow at +40% in 2021
- **Hot FTG is a growth area** – driving higher trip spend & more items per basket, operators need to keep up with consumer trends for hot, fresh and customisable options
- **Pizza continues to grow** – Growing ahead of the total out of home market, total ooh pizza grew strongly by +9.1% YOY to £2.5bn
- **UK's biggest pizza brand** - Chicago Town is £136m +6%
- **Wide product portfolio** – Cheese, Pepperoni, Chicken & Bacon, Vegan Jack Fruit, *NEW* Magnificent Meat Feast and Vegan Bac'n & Mushroom with more planned for 2022
- **Quick & Consistent Cook** – In as little as four minutes perfect for busy days parts
- **New self serve packaging** – Sealed; Holds for up to three hours
- **Flexible offer** – Holds in leading hot hold equipment for up to 3hrs
- **Big Brand Investment** - ATL investment with annual Pizza To Go marketing plan