

Meat & Poultry

Meat and poultry remain at the heart of menus, even if those menus are more diverse. CGA analysis shows that in the aftermath of COVID, UK restaurants have put the focus on established favourites, with burgers, steaks, roast dinners and chicken dishes all amongst the popular dishes taking a significant share of menu sales.

Costs and Opportunities

- Increased costs of meat and poultry have been driven by a broad range of factors. The impact of Brexit in terms of increased costs and bureaucracy of importing food was compounded by the war in Ukraine, which affected supply chains and caused grain shortages, increasing animal feed costs.
- One positive opportunity is increased demand over the past year from catering businesses for British farmed and produced products. This reflects an increase in consumers who say they are actively looking for British produce on menus, in order to support local businesses, farmers and the food sector.
- This trend for sourcing closer to home means fewer food miles, which supports carbon reduction and sustainability initiatives.
- Interest in a broader range of cuts and better value dishes have also helped drive Campbell Brothers 'nose-to-tail' approach, which aims to make maximum use of each animal.

Changing Demand

Meat and poultry product areas that have seen significant movement over the past year show the steps chefs are taking to adapt menus, manage costs and offer customers the best value in response to the economic challenges.

- Chicken** sales have generally increased 18% by volume as operators look to create dishes using a lower priced protein. Chicken is a versatile product that can be used in a range of dishes such as pasta, salads and risottos, while chicken wings served with sauces and dips are widely offered as snacks, starters and sharers.
- Pork** cuts have increased 10% by volume. While pork prices have increased, it remains one of the best value proteins. Pork belly and collar have been the main drivers of growth, offering enough versatility to feature on roast, barbecue, and grill menus, as well as in stews, pies, casseroles and a range of Asian dishes.
- Lamb** volumes are static overall, as it remains generally an expensive menu option. However, demand for minced and diced lamb has grown as chefs look for better-value ways to keep lamb on the menu. Its popularity in African and

Mediterranean dishes also offers chefs a range of ways to get minced and diced lamb on menus.

- Gourmet **sausages and burgers** have risen 25% in volume sales. Campbell Brothers' on-site production of these products, means they are available in a wide range of varieties and flavours, and can be produced to an individual customer's specifications, adding a point of difference to menus, while making use of better value cuts. Breakfast offers, and the growth of takeaway and delivery, has also driven demand for the British banger.

Beef

- Beef forequarter and hindquarter cuts increased 20% by volume. These better value cuts are ideal for slow cooking, creating dishes such as stews, pies and casseroles which have strong customer appeal and generate higher margins at a reasonable price point on menus.
- The appeal of better value beef cuts has come to an extent at the expense of prime steak cuts, which have seen a 5% decline in volume sales. The higher cost of prime steaks makes it difficult for some mainstream operators to maintain GP while still offering steak at a menu price point that won't deter customers.
- However, very premium steak has defied this trend. Campbell Brothers 'CB Reserve Beef' steak range, featuring Himalayan salt dry aged beef, has been the fastest growing product by volume over the last year. This has been driven by the return to trading of flagship, high-end restaurants, many of which took an understandably cautious approach to reopening post-pandemic.
- Despite pressure on consumer spend, there are customers ready to treat themselves to a premium meal on the right occasion, even if that means going out less often.

Top Products

The best-selling meat products supplied by Campbell Brothers 2022

- Flat Iron Beef Steaks
- Feather blade beef steaks
- Steak Beef burgers
- Beef daubes
- Diced Beef
- Topside of Beef
- Silverside of Beef
- Rump steaks
- Minced Beef
- Fillet Steaks
- Sirloin Steaks
- Rib Eye Steaks
- Diced Pork
- Pork Loin Steaks
- Minced Pork
- Pork Belly
- Chicken Thigh Meat
- Chicken Fillets
- Sausage Range
- Lamb - minced and diced

Beef is a specialty of Campbell Brothers, and its popularity, despite rising costs, is seen in the top sellers. However, operators are increasingly looking for better value options, with flat iron and feather blade steaks more in demand for mainstream menus than more premium sirloin and rib eye.

Across the board, from beef daubes to chicken thigh meat, and minced and diced pork and lamb, demand for better value cuts is high as chefs look to maintain customer appeal while managing pressure on budgets.

Top 10 fastest growing meat products

The fastest growing products for Campbell Brothers, based on 2022 sales growth compared to 2021

- Campbell Brothers CB Reserve Beef steak range, using...
 - Himalayan salt dry aged beef
 - Flat Iron Steak
 - Steak Burger range
 - Beef Steak Mince
 - Diced Beef
 - Pork Belly
 - Chicken Thighs
 - Chicken Fillets
 - Sausage range
 - Pork Belly

- The fastest growing products show that the market is very much a game of two halves. At the premium end, Campbell Brothers 'CB Reserve Beef' steak range is in demand from top-end restaurants, while for many mainstream menus, flat iron steak represents the best value cut. Chicken thighs and fillets have grown strongly in demand as chefs seek better value menu options.

Top 10 poultry

The best-selling poultry products in 2022

- Chicken Fillets
- Chicken Thigh Meat
- Chicken wing
- Chicken leg
- Chicken drumstick
- Chicken supreme
- Whole chicken
- Turkey Breast
- Turkey escalope
- Turkey rolled thigh

- Despite higher prices driven by the avian flu outbreak in 2022, chicken remains a good value protein, and is also seen as a healthier option by many consumers. Its versatility gives chefs the option to use chicken in a broad range of main courses, as well as on sharing and snack menus.
- Although turkey sales are seasonal to a considerable extent, some cuts are in year-round demand as a popular menu choice, and as a lean, healthier meat, turkey is popular on education menus.

Top 10 - the others

- Lorne sausage
- Black Pudding
- Haggis
- Duck Breast
- Cooked Meats
- Diced Chicken Breast
- Pork Loins
- Beef Striploins
- Beef Brisket
- Beef Stroganoff

- As menu choices expand and operators look to increase trading times, as well as make the most of the popularity of takeaway and delivery menus, demand for a broader range of meat and poultry products grows.
- The popularity of Lorne sausage and haggis reflects Campbell Brothers' strength in the Scottish market, while

demand for cooked meats shows the growth of deli-style sandwich counters and takeaway options.

- Like Lorne sausage, black pudding is in demand for breakfast menus.

Top 10 added value

The best-selling added value products in 2022

- Pork Breakfast Sausage
- Pork & Herb Sausages
- Cumberland Sausages
- Pork & Leek Sausages
- Cumberland Sausage Rings
- Black Puddings
- Haggis
- Steak burgers
- Pork & Chorizo Burgers
- Venison Burgers

- Campbell Brothers sausage range was one of the fastest growing products of 2022, reflecting demand from chefs for better value products that still maintain strong customer appeal, in dishes such as sausage and mash. Premium burger menus are easy to adapt for takeaway and delivery, driving growth of steak, pork & chorizo, and venison burgers.

Top meat product predictions for 2023

- Dry-aged Beef Steak Cuts – Fillet, Rib eye, Sirloin
- Flat Iron Steaks
- Feather Blade Steaks
- Pork Belly
- Chicken (all cuts)

- With inflation forecast to remain a challenge for both operators and consumers throughout 2023, cuts suitable for slow cooking, such as pork belly, are expected to see sales increase further.
- Steak is the first choice for many consumers as a 'treat' when eating out, even if they are able to go out less often. This should drive sales of premium steaks such as dry-aged fillets, rib eyes, and sirloins at the top end of the market, as well as demand for flat iron and feather blade steak cuts from mainstream and casual dining operators.
- As well as offering good value, chicken is popular as a healthier choice. This will drive demand right across the sector, and particularly from educational caterers as nutrition becomes more and more prevalent as a consideration.



Sticky chicken wings



🍴 Panko crumbed buttermilk chicken thigh burger chipotle dressing, hot chilli maple syrup, red cabbage slaw



🍴 Roast partridge, savoy cabbage, bacon and chestnuts with a celeriac fondant



🍴 CB Reserve beef – rib eye steak grilled & served on roasted potato, salsify, rocket & radish salad, with a salsa verde dressing

Inspiration...

- 🍴 Panko crumbed buttermilk chicken thigh burger chipotle dressing, hot chilli maple syrup, with a red cabbage slaw
- 🍴 Roast partridge, savoy cabbage, bacon and chestnuts with a celeriac fondant
- 🍴 CB Reserve beef – rib eye steak grilled & served on roasted potato, salsify, rocket & radish salad, with a salsa verde dressing