

# Independent Food Sector and its routes to market

**Guild of Fine Food**

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- The Guild of Fine Food
- Sector overview
- Guild survey analysis
- Looking forward
- Q & A



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# What is the GFF?

- 1300 trade members: 650 retail; 650 producers and suppliers
- Policy decided by its members
- Encouraging business through magazines, exhibitions, promotions and website
- Lobbying Government
- Product and business training
- Awarding those that excel



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# Independent sector - retail

Delis	1800
Farm Shops	1400
Butchers (deli)	400
Garden centre (food)	220

High Class Provisioners  
Online Traders  
Food Halls  
Grocery / Village Shops  
Tourist retail  
Food service



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# Independent sector – the last ten years

- 500 new delicatessens
- 800 new full retail farm shops
- 250 butchers adding deli counters
- 190 garden centres adding deli counters
- Supermarket increase in stocking speciality and regional food & drink



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# Independent sector – producer

- Definition is difficult
- Approximately 2500 - 3000 food producers supplying the sector



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# Independent Sector - the customer

What are they looking for?

- P rovenance
- Q uality
- R egionality
- S easonality
- T raceability



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# Differentiate

How does the independent trade make a difference?

- Knowledge and training
- Aladdin's Cave effect
- The genuine article – (PFN, authenticity)
- Customer service



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# GFF Survey 2008

2400 retailers sent survey; 177 returns  
Just over 7% response

***71 % of all deli owners claim they are  
currently earning an hourly rate below the  
minimum wage***



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# GFF Survey 2008

- **Has your turnover for the last six months increased, remained static or decreased when compared to the previous 12 months?**

	Delis	Farm Shops	Food Halls
Up	39%	62%	63%
Static	24%	10%	9%
Down	38%	28%	27%



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# GFF Survey 2008

- **How are total sales split by source: Local (30m), Regional (100m), British & Imported**

	Local	Regional	National	Import
Delis	26%	25%	29%	22%
Farm Shop	57%	22%	15%	6%
Food Hall	32%	17%	32%	21%



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# GFF Survey 2008

- **How do retailers identify new products to stock?**

Exhibitions	75%
Customer requests	69%
Editorial in trade mags	52%
Advertising in trade mags	48%
Great Taste Award winners	40%
Direct mail	40%
GFF accredited suppliers	31%
Reps visit	24%



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# GFF Survey 2008

- **Where do retailers source products from?**

National importers / distributors	29%
Local producers	24%
Local wholesalers	21%
Other British producers	19%
International producers	7%



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# GFF Survey 2008

- **What key factors are taken into account when choosing new products? (ranked 1,2,3)**

Delis	Farm Shops	Food Halls
Taste & flavour	Taste & flavour	Taste & flavour
Quality ingredients	Local connection	Quality ingredients
Source / authenticity	Source / authenticity	Source / authenticity



# GFF Survey 2008

## **What does the research tell producers and wholesalers about routes to the independent retailer?**

- They source through exhibitions and magazines
- They select first on 'taste and flavour'...
- ...then quality ingredients
- Minimum order levels
- Considerate but effective packaging
- Food that has been benchmarked



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# Looking forward

- Consumer spend in decline in most sectors
- Encouragement for food
  - Christmas figures
  - Entries in Great Taste Awards
- Trends are set in the independent sector



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# Independent Sector future trends and debating points

- Local v quality v provenance
- Perception of value
- Food service offer
- Additional revenue stream
- Rural food halls
- DIY



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“Speciality food reflects the personality of the person that makes it, which can reflect in successful retail theatre by a good seller – mainstream food made in big factories reflects the personality of the factory”

John McKenna, Bridgestone Guide



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Q & A

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[www.finefoodworld.co.uk](http://www.finefoodworld.co.uk)

[www.greatasteawards.co.uk](http://www.greatasteawards.co.uk)

[www.britainsbestdelis.co.uk](http://www.britainsbestdelis.co.uk)



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