

# 2017 FOODSERVICE FORECAST: EFFICIENCY, SUSTAINABILITY, GROWTH AND TRENDS



January 11, 2017



*It's Your Year of Energy Saving Solutions*  
The California Foodservice Resource Centers

## Special Guest Speaker

***Robin Ashton***

**Publisher**



**The Foodservice  
Equipment & Supplies Market:  
The *FER* 2017 Forecast**

**Special Guest Speakers**



**Chris Duggan**  
Director of Local  
Government Affairs

**A local Focus:**  
***What You Need to Know***

*Presentation by:*  
**Richard Young**  
Director of Education



**Food Service  
Technology Center** 



**FISHER  
NICKEL**  
A division of Frontier Energy, Inc.

## Who?

**The Food Service Technology Center (FSTC) is an unbiased energy-efficiency research program funded by California utility customers.**

Specializing in commercial food service  
Promoting energy efficiency and performance  
Celebrating 29 years of hard work!



**Download Today's Handout:**

[www.fishnick.com/handouts/01112017](http://www.fishnick.com/handouts/01112017)



Agenda:

- 9:00 Introduction
- 9:15 Welcome and Safety
- 9:30 Richard Young – Trends in Sustainability for 2017
- 10:15 Break
- 10:30 Robin Ashton – Industry Overview for 2017
- 11:30 CRA – Local Focus – What You Need to Know in 2017
- 12:00 Networking Lunch

## **Learning Goals**

- National Food and Concept Trends
- Trends in energy and water costs
- Efficient lighting technology – Learn a Skill!
- Resources for 2017

# National Food and Concept Trends:

The image is a screenshot of the National Restaurant Association website. At the top left is the logo for the National Restaurant Association. To the right of the logo is a navigation menu with links for 'Login', 'About Us', 'Membership', 'Pressroom', 'Store', and a search bar. Below the navigation menu are several menu items: 'Manage My Restaurant', 'Issues & Advocacy', 'News & Research', 'Events & Groups', 'Industry Impact', and 'Restaurant Careers'. The main content area features a large banner for 'WHAT'S HOT 2017 CULINARY FORECAST' with the text 'Discover ideas to please guests in the new year' and a 'Read More' link. To the right of the banner is a 'News of the Day' section with a photo of a chef and the headline 'Efficient equipment is the key to big savings'. The text below the headline reads: 'Real savings happen when you outfit your restaurant with efficient equipment, but the ROI needs to be better for buy-in to occur, a design expert says.' and includes a 'Visit News Page' link with a right-pointing arrow. A red circle is drawn around the 'News of the Day' section.



The National Restaurant Association surveyed nearly 1,300 professional chefs — members of the American Culinary Federation — on which food, cuisines, beverages and culinary themes will be hot trends on restaurant menus in the year ahead.



## Let's check out the What's Hot Video

<http://www.restaurant.org/News-Research/Research/What-s-Hot>



# WHAT'S HOT

## 2017 CULINARY FORECAST

**TOP 10 CONCEPT TRENDS**

- 1 Hyper-local sourcing
- 2 Chef-driven fast-casual concepts
- 3 Natural ingredients/clean menus
- 4 Environmental sustainability
- 5 Locally sourced produce
- 6 Locally sourced meat and seafood
- 7 Food waste reduction
- 8 Meal kits
- 9 Simplicity/back to basics
- 10 Nutrition

NATIONAL RESTAURANT ASSOCIATION  
Restaurant.org/FoodTrends

The infographic features a red and black background with a circular pattern. It includes two Polaroid-style photos: one of a chef in a white uniform holding a tray of fresh vegetables, and another of a plate of food with various ingredients like cheese, tomatoes, and mushrooms. The National Restaurant Association logo and website are in the top right corner.

## TOP 10 CONCEPT TRENDS

- ✓ **1 Hyper-local sourcing**
- ✓ 2 Chef-driven fast-casual concepts
- ✓ **3 Natural ingredients/clean menus**
- ✓ 4 Environmental sustainability
- ✓ 5 Locally sourced produce
- ✓ 6 Locally sourced meat and seafood
- ✓ **7 Food waste reduction**
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- 9 Simplicity/back to basics
- 10 Nutrition

## “Clean” is a Movement

“In late November, top food executives from PepsiCo and Campbell Soup Company told Fortune that cleaner food is not just a trend, but a movement.”

[www.businessinsider.com/new-healthy-fast-food-chains-better-than-mcdonalds-2016-12](http://www.businessinsider.com/new-healthy-fast-food-chains-better-than-mcdonalds-2016-12)





## Compass Group USA Becomes First Food Service Company to Commit to 100% Healthier, Slower Growing Chicken by 2024 through Landmark Global Animal Partnership Agreement

 PR Newswire November 3, 2016



**Amy Keister**  
VP Consumer Engagement at Compass Group

Compass is agreeing to ensure certification under [GAP's 5-Step Animal Welfare Rating program](#) for all broiler chickens as a buying requirement across 100 percent of their business by 2024.

“When Compass, the largest food service company in the world, says enough is enough...we know we are at a tipping point...”

[finance.yahoo.com/news/compass-group-usa-becomes-first-145300447.html](http://finance.yahoo.com/news/compass-group-usa-becomes-first-145300447.html)

## Bloomberg

In October, McDonald's Corp. Chief Executive Officer Steve Easterbrook told analysts that Chicken McNugget sales rose 10 percent two months after one clean-food announcement.

Papa John's International Inc. said that it had nixed 14 "unwanted ingredients..."

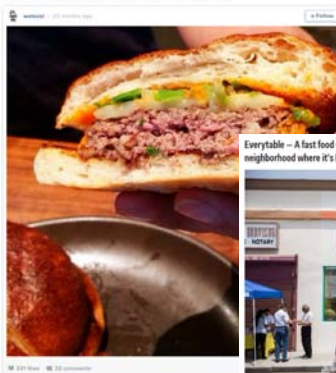
[www.bloomberg.com/news/articles/2016-11-11/want-fries-with-that-kale-fast-food-chains-court-granola-crowd](http://www.bloomberg.com/news/articles/2016-11-11/want-fries-with-that-kale-fast-food-chains-court-granola-crowd)

BUSINESS INSIDER

7 up-and-coming healthy fast food chains that should scare McDonald's

"Clean", Innovative, Local, Healthy and Social Equity

Local - A California eatery where everything costs \$6 or less



Eatsa - An automated vegetarian chain



Everytable - A fast food chain that changes its prices based on the average income in the neighborhood where it's located



[www.businessinsider.com/new-healthy-fast-food-chains-better-than-mcdonalds-2016-12](http://www.businessinsider.com/new-healthy-fast-food-chains-better-than-mcdonalds-2016-12)

## **Bloomberg**

“Then, there’s the cost. This year, global food prices fell to a seven year low. So chains can afford to experiment with pricier items...but the trend could reverse.”

“...restaurants may eventually be forced to raise prices or the more expensive fare may cut into profit.”

“The customer’s got to pay for it...How much will they accept?”

[www.bloomberg.com/news/articles/2016-11-11/want-fries-with-that-kale-fast-food-chains-court-granola-crowd](http://www.bloomberg.com/news/articles/2016-11-11/want-fries-with-that-kale-fast-food-chains-court-granola-crowd)

**Control Food Waste so you can be:**

**“Clean”, Innovative, Local, Healthy and  
Social Equitable**

## fun fact

Four to 10 percent of food purchased by a foodservice operation is discarded before ever reaching a guest, according to LeanPath. By keeping tabs on and reducing waste, chefs and operators can cut food costs and increase profits. For more on food waste reduction, visit [Conserve.Restaurant.org](http://Conserve.Restaurant.org).



## LEANPATH 360 FLOOR SCALE



- A food waste bin sits directly on the floor scale, and a waste transaction is automatically initiated on the terminal when waste is deposited into the bin
- Includes a durable touchscreen terminal and integrated floor scale
- Track multiple characteristics of food waste, including food types, food costs, waste sources, loss reasons, and more
- Actionable data points are displayed on the terminal, prompting users to focus on high-value opportunities

grind<sup>2</sup>energy

**turn  
food scraps  
into energy**

EMERSON

<https://youtu.be/rZHn6QmKoQ8>

## Food Service Technology Center Seminars

Date & Time*		Seminar Topics
Jan. 10	9 – 12PM	2017 Foodservice Forecast
Feb. 23	9 – 11AM	Sustainability Beyond the Plate: Intro to Energy Efficiency
Mar. 9	9 – 11AM	Lighting for Commercial Foodservice
Mar. 23	9 – 11AM	Reduce Downtime with an Equipment Care Plan
Apr. 25	9 – 12PM	Clearing the Air on Kitchen Ventilation Efficiency
May 16	9 – 12PM	Kitchen Tune-Up: Look under your Restaurant's Hood for Energy & Water Savings
Jun. 14	9 – 11AM	Wasting Away: Food Waste Reduction for Restaurants
Jul. 25	9 – 1PM	Foodservice in Motion: From the Food Truck to Brick and Mortar
Aug. 8	9 – 12PM	Mastering the Craft of Sustainable Brewing
Sept. 12	9 – 12PM	Build a Better Burger
Sept. 21	9 – 11AM	What's in the Water? Water Quality and the Commercial Kitchen
Oct. 4	9 – 11AM	Nutrition Labeling and Allergens: What You Need to Know
Oct. 19	9 – 11AM	Food Safety & Preventative Maintenance Practices for Commercial Kitchens
Nov. 9	9 – 12PM	Putting the Kitchen of the Future to the Test
Dec. 7	9 – 12PM	Hot Water System Design for Commercial Kitchens

**Register: [fishnick.com/seminars](http://fishnick.com/seminars)**

All Seminars are held at the PG&E Food Service Technology Center - 12949 Alcosta Blvd., Suite 101 San Ramon, CA 94583

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**FOOD SERVICE TECHNOLOGY CENTER**  
PROMOTING ENERGY EFFICIENCY IN FOODSERVICE

1.800.398.3782  
Certified Green Business

Enter search criteria

About Save Energy Save Water Design Equipment Testing Ventilation Education Publications

Home » Education »

### Workforce Education & Training Seminars



**Check out the 2017 Energy Wise Calendar**

<	Jan 2017	>				
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31				

View Events by Category:

**Tuesday, January 10, 2017**  
09:00 AM - 12:00 PM **2017 Foodservice Forecast**  
Robin Ashton, Jot Condi, Jessica Lynam and Richard Young - San Ramon, CA

**Wednesday, January 11, 2017**  
09:00 AM - 12:00 PM **2017 Foodservice Forecast**  
Robin Ashton (EER), Chris Dossan (CRA) and Richard Young (ESTC) -  
Professional Management Services  
David Scott Peters - Downey, CA


**Thursday, February 23, 2017**  
09:00 AM - 11:00 AM **Sustainability Beyond the Plate: Intro to Energy Efficiency**  
Richard Young - San Ramon, CA

[www.fishnick.com/education/seminars/events/](http://www.fishnick.com/education/seminars/events/)

CALIFORNIA FOODSERVICE RESOURCE CENTERS SEMINARS





Home About Current Seminars All 2017 Seminars Industry Calendar

## Foodservice Professionals, It's Your Year of Energy Saving Solutions 2017

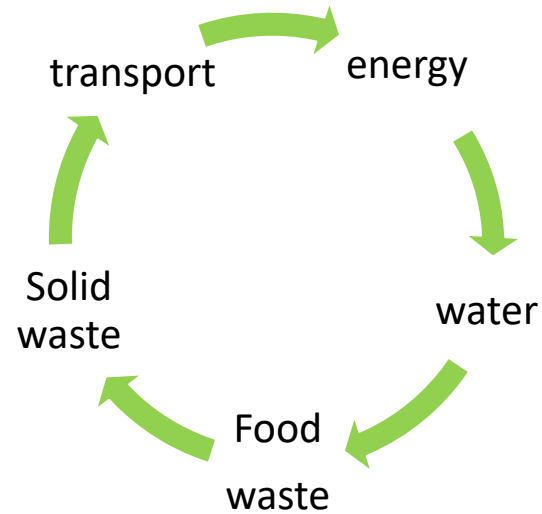


## We've saved you a seat, so you can save some energy.

2017 Industry Calendar  
[SEE NOW ►](#)

 SoCalGas  
 EDISON  
 Pacific Gas and Electric Company  
 SDGE

## Everything Relates to Everything Else



**Control Food & Energy & Water Waste  
so you can be:**

**“Clean”, Innovative, Local, Healthy and  
Social Equitable**



## Profit Growth vs Cost Cutting

- 1% Traffic\* (\$240 million)
- 2% Ticket Price\* (\$720 million)
  
- Total Energy Bill = \$40 Billion
- One percent reduction = \$400 million
- Cutting utility costs makes sense

\*NPD 2017 predictions for CFS industry growth

The image is a screenshot of a New York Times article. The top left corner shows the logo for 'The New York Times' and the word 'OPINION'. The main title of the article is 'Dinner, Disrupted'. Below the title is a sub-headline: 'Silicon Valley has brought its wrecking ball to haute cuisine, and the results are not pretty.' The author is listed as 'By DANIEL DUANE' and the date as 'AUG. 6, 2016'. There are social media sharing icons for Facebook, Twitter, Email, and Print. On the right side of the article preview, there is a large image of a white plate with a silver fork. The plate is cracked and broken, with a large section missing, symbolizing disruption. The URL at the bottom of the screenshot is 'www.nytimes.com/2016/08/07/opinion/sunday/dinner-disrupted.html'.



“...labor costs at restaurants are inching past 50 percent of total expenditures, an indicator of poor fiscal health.”

“We’re already seeing quicker openings and closings because restaurants open with so much debt...if you’re not full from Day 1, it’s really hard to stay open.”

As Mr. Patterson explained, “The food has never been better and the business climate has never been worse and so we are speeding toward a cliff.”

“...the mid-level is getting killed,” Mr. Patterson told me. “I’ve heard guys say they’re doing eight million a year in sales and bringing home less than 2 percent as profit.”



## 4 ways to attract consumers in 2017


**1. Increase innovation.** The world is changing — fast — and consumers expect restaurants to keep up, to provide innovation and to be relevant not only on the menu, but in the overall restaurant experience. Operators that fail to innovate risk being overlooked by a significant portion of consumers, according to NPD’s 2017 Outlook.

Arby’s, which posted record-setting sales growth and a significant traffic increase in 2015, is among major chains hyper-focused on innovation. From menu developments such as sous vide pork belly, to time-saving operational advances such as cook-and-hold ovens, to a forthcoming mobile ordering app, Arby’s has been hitting on all the innovation cylinders.

[www.nrn.com/consumer-trends/4-ways-attract-consumers-2017](http://www.nrn.com/consumer-trends/4-ways-attract-consumers-2017)

## TOP 10 CONCEPT TRENDS

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# Food Service Technology Center

Innovation

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# Food Service Technology Waste Reduction

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## WHAT'S HOT

### 2017 CULINARY FORECAST

NATIONAL RESTAURANT ASSOCIATION  
Restaurant.org/FoodTrends

#### TOP 10 FOOD TRENDS

- 1 New cuts of meat
- 2 Street food-inspired dishes
- 3 Healthful kids' meals
- 4 House-made charcuterie
- 5 Sustainable seafood
- 6 Ethnic-inspired breakfast items
- 7 House-made condiments
- 8 Authentic ethnic cuisine
- 9 Heirloom fruit and vegetables
- 10 African flavors



## TOP 10 FOOD TRENDS

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### LOVE IT BEFORE YOU LIVE WITH IT

Try out new high-performance kitchen equipment at the FSTC. Our Chef Consultant Mark Duesler has a wide array of equipment available for you to test drive.

- STEP 1. Visit [fishnick.com/demos](http://fishnick.com/demos)**
- STEP 2. Schedule your hands on Demo**  
(For more information contact Mark Duesler at — [mduesler@fishnick.com](mailto:mduesler@fishnick.com) or 925.866.5960)
- STEP 3. See the equipment in action and bring your menu items to life!**

Looking for a new fryer or need to replace that old broken oven?

**SCHEDULE YOUR DEMO TODAY!**



**Mark Duesler**  
Chef Consultant

With 20 years in the food service industry and 15 years in the kitchen, Mark will share his expertise and help you find a solution for your operation.

**We launched an online, on-demand education platform built specifically for foodservice**

***Foodservice Energy Efficiency Expert***



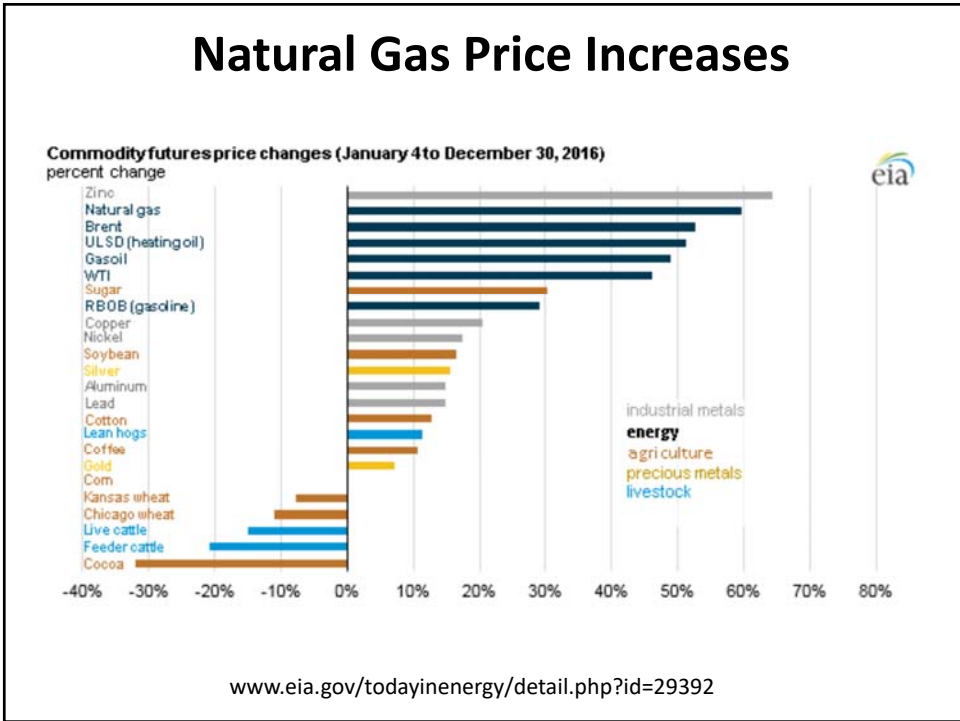
FeThree.com

www.fethree.com





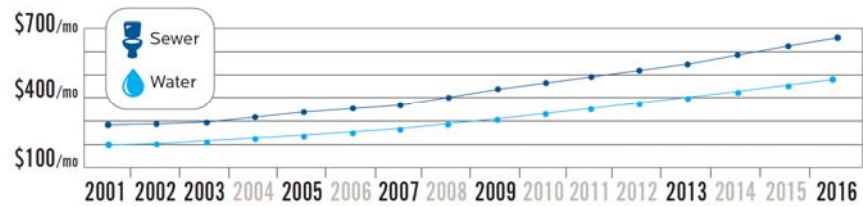
# Utility Trends: Energy Prices



## Utility Trends: Water costs

**BLACK & VEATCH**  
Building a world of difference.<sup>®</sup> **50** LARGEST CITIES  
RATE SURVEY 2016

FIGURE 15: Average commercial water and sewer costs per month (100,000 gallons).



Gray text = Survey results for these years are extrapolated based on the average of the preceding and following years.

## What's up with efficient lighting?

### MR16 Spots have become very cost effective



Source: <http://www.soraa.com/>



Source: <http://gc-lighting.com/>







## Main Squeeze

Oakland, CA  
Restaurant Case Study

**Main Squeeze**, a "Premium Organic Juicery" located in Oakland, California is a great example of a small independently owned business and a "great candidate for a lighting upgrade," according to The PS&E Food Service Technology Center's RSTC lighting expert Richard Young.

As is common with many small independent foodservice operators, Main Squeeze was outfitted with low-cost residential style track lighting, which comes standard with MR16 halogen lamps – typically 50 watts. Young worked with Main Squeeze to replace (7) 50 watt Philips halogen MR16 lamps with (7) 4.5 watt Philips LED lamps. The upgrade required that the LED lamps have a GU10 base in order to fit into the existing fixture. These lamps were purchased at a local big box home improvement store.

Once installed, the track heads were oriented for maximum effective illumination of the space. This simple upgrade improved the lighting and reduced the annual energy bill for Main Squeeze by \$234.

To help Main Squeeze understand the savings associated with the LED replacement, Young quickly did a side-by-side comparison using the [ftrnck.com lighting calculator](http://ftrnck.com/lighting/calculator/#tab=uk.com/averageenergy/rooftop/ledcalculation/ledlampcalc.php?). ([@averageenergy/rooftop/ledcalculation/ledlampcalc.php](https://twitter.com/averageenergy/rooftop/ledcalculation/ledlampcalc.php))

	Halogen MR16 Lamp*	LED MR16 Lamp*
Annual Cost to Operate	\$260	\$26

\* 7 Lamps operating 10 hours, 365 days/year with an electric energy cost of \$0.17/kWh

"Energy wasted by inefficient devices, like halogen lamps, directly impacts profits," states Young. In the case of Main Squeeze, if the store is making a 16% percent profit, they would have to sell \$4,600 worth of smoothies a year to cover the energy wasted by the halogen lamps or \$24,440 worth of smoothies over the 5 1/2 year life of the LED lamps.

The LED lamps Main Squeeze installed only cost \$60 and will pay for themselves in less than 3.5 months.



### Savings By the Numbers

Annual Energy Bill Reduction	\$234
One-time Capital Cost for LED Lamps	(\$60)
First Year Savings	\$169
Total Savings Over 5 Years	\$1,222

LED lamps were five times less expensive to operate than the equivalent Halogen lamps.



LED Lamp and Fixture with GU10 Base.



Lighting Fixture with new LED lamps.



LED Lamp (left) and Halogen Lamp (right).



Lighting Fixture with new LED lamps.

PS&E Food Service Technology Center – 13542 Avenida Blvd., Suite 101, San Ramon, CA, 94583 – 1.800.368.3762 [FTRNCK.COM](http://FTRNCK.COM)



***LED Lamp and Fixture with GU10 Base.***



***Lighting Fixture with new LED lamps.***

## Savings By the Numbers

Annual Energy Bill Reduction	<b>\$234</b>
Total Capital Cost for LED Lamps	<b>(\$65)</b>
First-Year Savings	<b>\$169</b>
Total Savings Over 5-Years	<b>\$1,222</b>

[www.fishnick.com/about/casestudies/](http://www.fishnick.com/about/casestudies/)

The screenshot shows the website for the Food Service Technology Center. The header includes the logo, the tagline "PROMOTING ENERGY EFFICIENCY IN FOODSERVICE", a phone number (1.800.396.3782), and a "Certified Green Business" badge. A search bar is also present. The main navigation menu includes: About, Save Energy, Save Water, Design, Equipment, Testing, Ventilation, Education, and Publications. The page content is titled "Energy Efficiency Case Studies" and features four case study cards:

- Angelou's Mexican Grill Restaurant Case Study:** Thanks to PG&E's Step Up and Power Down program and California Energy Wise equipment rebates, Angelou's purchased efficient refrigeration equipment and incorporated energy saving best practices.
- Danville Brewing Company Restaurant Case Study:** Danville Brewing Company took advantage of the FSTC's 'Try Before You Buy' program and test drove a new ENERGY STAR fryer that delivers high quality fried foods for their menu.
- Main Squeeze Restaurant Case Study:** Main Squeeze in Oakland leveraged the FSTC's expertise in efficient lighting and upgraded to money-saving LED lamps that will pay for themselves in less than 3 1/2 months.
- Sideboard Restaurant Case Study:** Capitalizing on the energy efficiency successes of their Danville location, Sideboard called upon the FSTC when it was time to open a second location in Lafayette.

On the right side of the page, there is a "California Energy Wise" graphic featuring a cartoon owl and the text "Rebate Qualified". Below this is a video thumbnail with the caption "Watch PG&E's CURRENTS video featuring the FSTC's work with Tadich Grill".

## Time to Embrace LEDs!



## How to Calculate Savings? Start at www.fishnick.com

The screenshot shows the Food Service Technology Center website. A red arrow points from the 'Save Energy' link in the top navigation bar to a dropdown menu. The dropdown menu lists various resources under 'Save Energy' and 'Save Water' categories.

**Save Energy**

- Rebates
- ENERGY STAR®
- Energy Tips
- Green Sheets
- Self Site Survey Checklist

**Tools**

- Life Cycle Cost Calculators
- Outdoor Air Load Calculator
- The Energy Efficient Kitchen Tool

## Lighting Calculators

The screenshot shows the 'Life-Cycle & Energy Cost Calculators' page on the Food Service Technology Center website. A red arrow points from the 'Save Energy' link in the top navigation bar to the 'Lighting' category under the 'Life-Cycle & Energy Cost Calculators' section.

**Life-Cycle & Energy Cost Calculators**

High-efficiency equipment will continue to save energy dollars years after the initial purchase. These calculators allow you to compare the total cost of operating different appliances over their useful service lives.

**Lighting**


- Linear Fluorescent Lamps
- Screw-In Lamps

**Related Links**

- Spray Valve/ Water Cost Calculator
- Appliance Reports
- ENERGY STAR®



**TOP TRENDS BY CATEGORY**



Alcoholic Beverages


Craft/artisan spirits

**ALCOHOLIC BEVERAGES**

- 1 Craft/artisan spirits
- 2 Onsite barrel-aged drinks
- 3 Locally produced wine/spirits/beer
- 4 Regional signature cocktails
- 5 Culinary cocktails

**BREAKFAST/BRUNCH**

- 1 Ethnic-inspired breakfast items
- 2 Avocado toast
- 3 Traditional ethnic breakfast items
- 4 Overnight oats
- 5 Breakfast hash



Dishes

Street food-inspired dishes

**CONDIMENTS AND ACCOUTREMENTS**

- 1 House-made condiments
- 2 Ethnic spices
- 3 House-made pickles
- 4 Protein-rich grains/seeds
- 5 Artisan cheeses

**GLOBAL FLAVORS**

- 1 Authentic ethnic cuisine
- 2 African flavors
- 3 Ethnic fusion cuisine
- 4 Middle Eastern flavors
- 5 Latin American flavors

**CULINARY CONCEPTS**

- 1 Hyper-local sourcing
- 2 Natural ingredients/clean meat
- 3 Environmental sustainability
- 4 Locally sourced produce
- 5 Locally sourced meat and seafood

**DISHES**

- 1 Street food-inspired dishes
- 2 House-made charcuterie
- 3 Vegetable carb substitutes
- 4 Seafood charcuterie
- 5 Pho

National Restaurant Association | Restaurant.org/TopTrends | 4



Alcoholic Beverages

Craft/artisan spirits

**ALCOHOLIC BEVERAGES**

- 1 Craft/artisan spirits
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Certified Green Business

Enter search (0/25)

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### FSTC Webinar Learning to See: Lighting Design for CFS

Webinar: Lighting Design for CFS  
Workforce Education & Training

**LEARNING TO SEE:  
LIGHTING DESIGN FOR  
COMMERCIAL FOOD SERVICE**

Food Service Technology Center  
CALIFORNIA RESTAURANT ASSOCIATION

1:03:41  
November 29, 2016 HD :: vimeo

Download the Presentation-  
Learning to See: Lighting Design for Commercial Food Service (pdf, 1.3 MB)

Tuesday November 29, 2016  
10:00 am - 11:00 am PST

Speakers:  
Derry Berrigan, Light Think Studios  
Richard Young, FSTC

Previous Webinars  
Tuesday, November 29th, 2016  
Lighting Design for CFS  
Wednesday, September 21st, 2016  
Rack Conveyor Dishmachine Design  
Thursday, May 12th, 2016  
Helpful Hints for a Successful NRA Show  
Thursday, December 3rd, 2015  
DCKV - What, When & Where?  
Wednesday, June 10th, 2015  
Top Shelf Kitchen Design: 4 Steps to Efficient Equipment  
Tuesday, May 12th, 2015  
What You Need to Know Before NRA  
Wednesday, March 18th, 2015  
In Pursuit of Zero Waste

<http://fishnick.com/education/webinars/2016/lighting/>

## **CEC Gas Cookline and Hot Water Projects**

- Catering
  - Restaurants
  - Hotel
  - University
- 
- Steamers, Fryers, Ovens, Combination Ovens, TurboPots, Griddles, Dishmachines

**Results are On The Way!!**

**It's going to be  
an exciting year!**



*Thanks!*

