



FOODSERVICE OPPORTUNITIES TO MAXIMISE *Mushroom Consumption*

Eating out has become an ongoing love affair in Australia, with consumers regularly going out for work lunches, having brunch on the weekends, or ordering in takeaway for an easy dinner at home. In fact, the opportunities for enjoying food outside of the home are seemingly endless – something that is backed up by data suggesting that almost eight out of ten Australians aged 14 and above eat out at least once a month. The Eating Out in Australia 2019 report points to 4.5 million daily transactions by consumers, leading to a total annual spend per person of \$880 in what has become a \$22 billion market.

For mushrooms, the changing face of foodservice represents opportunity. In 2019 the foodservice sector consumed 9,200 tonnes [approximately 13%] of *Agaricus bisporus* produced in Australia.

A 2019 levy-funded project has examined the foodservice market for mushrooms. The research provides an understanding of the current usage, perceptions and barriers to using mushrooms in the foodservice

industry. The findings are a crucial first step in maximising the use of mushrooms in the foodservice sector.

RESEARCH METHODOLOGY

The study examined the use of mushrooms in the foodservice market using qualitative interviews, a quantitative survey and primary collected data from a sample of 300 foodservice operators.

This carefully selected sample represents the relative size of each foodservice channel, to as accurately as possible reflect the opinions and behaviours of the total Australian foodservice market.

From this, the results were broken down into commercial [e.g. restaurant, cafe and function caterer] and institutional [e.g. hospital, aged care and daycare centre] foodservice channels to allow further analysis of the potential opportunities.

MARKET SIZE

The study highlighted that the use of mushrooms in foodservice

is considerable, especially in the commercial channels which account for the majority [91%] of the total purchase of mushrooms in the foodservice market [see Table 1].

Across the foodservice sector whole white button mushrooms are by far the most used mushroom type. It is interesting to note that the study found very low use of sliced mushrooms, suggesting that foodservice operators are not convinced that pre-prepared mushrooms are worth the extra cost.

INSIGHT - FOODSERVICE PERCEPTIONS OF MUSHROOMS

The research indicated that the foodservice industry has several positive perceptions about mushrooms, including: Australian-grown mushrooms are high quality, with almost all channels rating the quality of mushrooms above 6 out of 7.

Mushrooms are a versatile ingredient that can be used as both a hero and staple ingredient in their menus.

	Total Foodservice Industry	Commercial	Institutional
Grand total volume [kg]	9.2 million	8.4 million	800,000
Grand total value [AUD]	58.6 million	53.1 million	5.5 million

Table 1. Volume and value of *Agaricus bisporus* products in the foodservice industry.

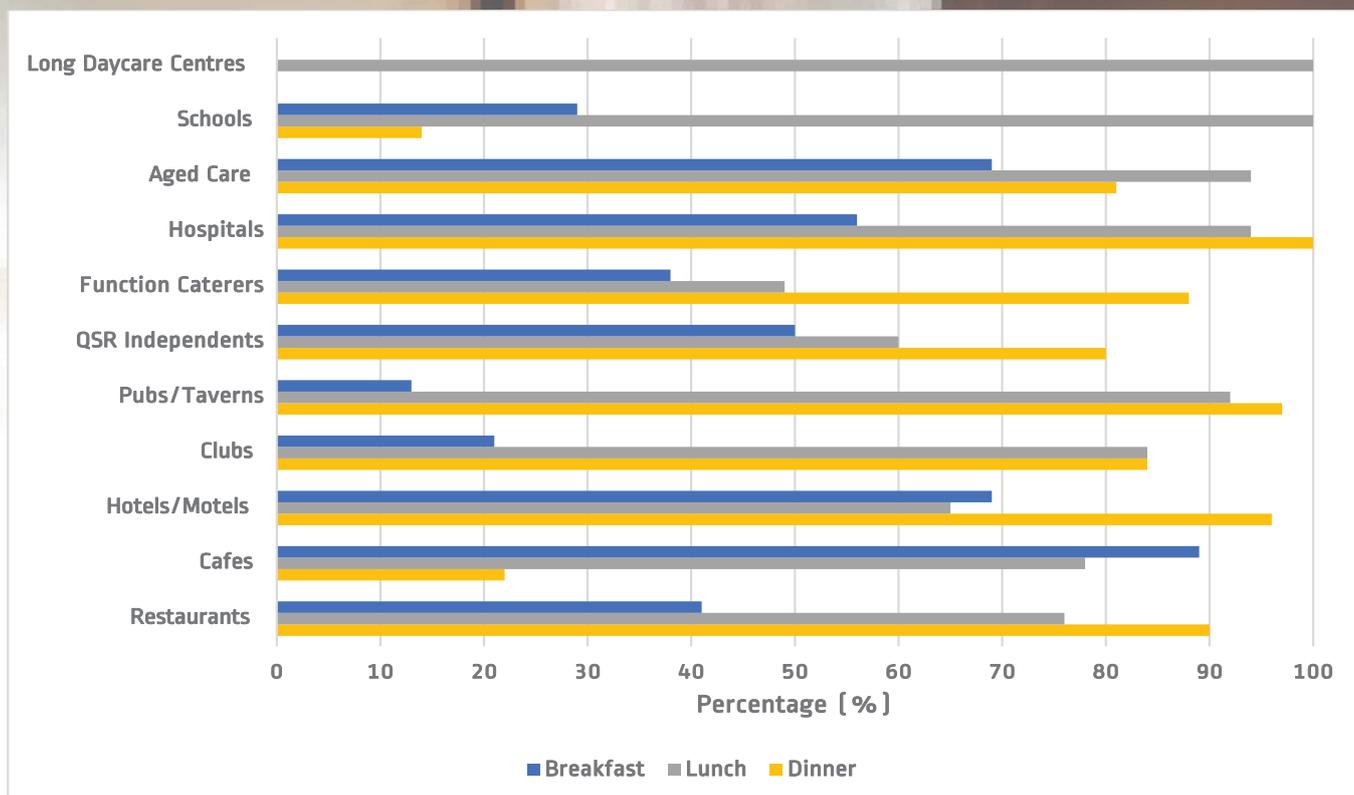


Figure 1. Percentage of foodservice channels serving mushrooms on their menus by eating occasion.

Mushrooms are thought to be flavourful, popular, nutritious and a useful vegetarian option for menus. The most common reason for including mushrooms in foodservice menus was due to flavour, followed by popularity. For institutional channels where health and wellbeing are priority over repeat purchase (such as hospitals, schools and daycare centres), the nutritional benefits of mushrooms were shown to be one of the most important factors in their decision to include mushrooms.

Interestingly the results also highlighted a variety of reasons why mushrooms are not included on menus, with the most common answer (at an average of 13% of respondents) being that the mushrooms are not in season. This

finding indicates a lack of knowledge that mushrooms are available year-round and could also reflect the perception mushrooms are only suitable for certain seasons such as winter. It also highlights a serious need to encourage year-round usage of mushrooms by the foodservice industry.

INSIGHT - MEALTIMES SERVING MUSHROOMS

The research also looked at mushroom use across all eating occasions in the foodservice sector. Interestingly the data (Figure 1) shows that mushrooms are mostly used in dinners, followed by lunch and then breakfast.

In terms of the foodservice channels,

the top three channels for each meal occasions are as follows:

1. Breakfast – Cafes, Hotels/Motels, and Aged Care.
2. Lunch – Long Daycare Centres, Schools, Aged Care & Hospitals.
3. Dinner – Hospitals, Pubs/Taverns, Hotel/Motels.

With the growth of breakfast in the Australian culture, one promising finding was that 89% of cafes currently serve mushrooms for breakfast. It is also interesting to note that there is a high recognition of the nutritional benefits of mushrooms in the institutional channels of foodservice, with daycare (100%), school (100%), aged care (94%) and hospital (94%) channels all serving mushrooms during lunches.

	Share of Volume by Product [%]		Share of Value by Product [%]	
	Commercial	Institutional	Commercial	Institutional
White Button – Whole	81	85	80	84
White Cup – Whole	4	10	4	10
White Flat/Large Open – Whole	7	2	8	2
Swiss Brown – Whole	5	<1	6	<1
Portobello/Open Swiss – Whole	2	<1	3	<1
White – Sliced	<1	3	<1	3
Brown – Sliced	<1	<1	<1	<1

Table 2. Share of volume and value by product in commercial and institutional settings.



INSIGHT - MENU INSPIRATION AND CHANGES

In terms of making changes to existing menus, the foodservice operators surveyed for the project indicated that they make changes between one and three times a year, with the most common times occurring in March, June, September and November. Surprisingly the foodservice channels highlighted social media, followed by word-of-mouth and personal relationships (between suppliers, chefs and cooks) as being the major sources of menu inspiration for making changes. This finding reinforces the importance of the Australian Mushrooms social media channels in influencing consumption growth.

SOURCE OF MUSHROOM SUPPLY

When it comes to sourcing mushrooms for the foodservice sector, 53% of respondents indicated that they obtain mushrooms from specialist distributors and wholesalers. A notable weak point in this supply chain is the fact that 40% of commercial operators reported they do not have a secondary source of supply. For these operators, it means that if their primary source (most commonly, wholesalers) cannot meet their demands for mushrooms, they go without mushrooms on the menu. This approach contrasts with many institutional operators (49%) who use supermarkets as their secondary source of supply.



The Foodservice Farm Tour Program developed relationships with foodservice operators

Where to from here?

The project has highlighted that mushrooms are seen by the foodservice sector to be a high-quality ingredient, offering value in several ways. Disappointingly the perception that mushrooms are a seasonal ingredient, combined with a lack of knowledge on how to prepare mushrooms is limiting the wider use among foodservice operators.

On the positive side however, 27% of operators surveyed in this research wanted further training and education on how to use mushrooms in dishes and identified printed information and online tutorials as being preferred methods of learning.

The receptiveness of the foodservice sector to engage with the mushroom industry is promising and opens the opportunity to build on some of the relationships established through the successful Foodservice Farm Tour program (see <http://bit.ly/2Ua2KP9> for further information) conducted during 2017 and 2018.

The completion of this project, combined with other foodservice initiatives, are helping to build a deeper understanding of the requirements and opportunities that exist within the sector.

These deeper key market insights will now allow the development and implementation of a sharply focused, comprehensive foodservice strategy.