

TMP

# Monthly

August 2023



# Contents



- 04**    Sussex Supplier Network
- 06**    Koffmann's New Potatoes
- 08**    Fresh Produce
- 10**    Product Focus
- 12**    Rockwater Restaurant
- 14**    Meat & Seafood
- 15**    In The Spotlight
- 16**    Princesse d'Isenbourg et Cie®
- 18**    Eggs, Dairy & Bakery
- 19**    Brookfield Barn
- 20**    Dry Goods, Oils & Sundries



# Welcome

Welcome to the August issue of our market report, TMP Monthly. At The Menu Partners we pride ourselves on our relationships with our customers and suppliers. This month we want to highlight two of our Sussex based customers, serviced by our team in Brighton. Rockwater, a new waterside restaurant and lifestyle hub in Hove (see p13) and Brookfield Barn, a picturesque wedding venue in West Sussex (see p19).

Over the last few months, the team and I have been on a number of supplier visits to source the best produce Sussex has to offer. It's fundamental for us to work with local suppliers so we can offer good quality sustainable products, whilst also supporting local businesses. You can read more about our local supplier network in the next pages (4 & 5).

I hope you enjoy this August issue, which includes the exciting launch of the Koffmann's Baby New Potatoes and a feature on our fine foods partner, Princesse d'Isenbourg et Cie®.



*Jack O'Neill*

Head of Operations - Brighton  
[jack.oneill@the-menu.com](mailto:jack.oneill@the-menu.com)

*The Menu*  
PARTNERS

# RINGDEN FARM



**Grown, pressed,  
bottled in Kent &  
The Sussex Weald**

Originally founded in 1949 after the sale of land belonging to the Seacox Heath Estate, Ringden's stood as a bare 17 acre field.

In 1963, the Dench family developed the farm as a fruit producer, planting apples, pears & plums. However, a storm in the early 90s ruined their apple crop, prompting the family to produce 1000 bottles of cox & bramley juice as once planned.

This home-grown juice was labelled each by hand & offered to their wholesale fruit customers, sparking positive reviews.

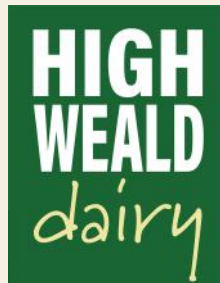
Now, the family-run farm produces 20+ award-winning single-variety apple juices using traditional methods & slow pasteurisation to preserve the distinctive flavour of English apples.



**11x Artisan  
Bakeries & Kitchens**



**Produce  
8000 Litres  
Per Day**



# HIGH WEALD DAIRY

*UK Maker*

**35+  
Years**

In the late 80s, Mark (Founder) & his parents established a flock of 150 British Friesland sheep for milking at their small family farm in Duddleswell.

Later, the family began to bottle the fresh sheep milk & sell to local health food shops.

Established in 1986, High Weald Dairy are a family-run & award-winning dairy producer in Horsted Keynes, Sussex. The expert team still do things the same as when they started all those years ago: with their hands and lots of passion.

*Cheese*

**15  
Varieties**



Created in 2012 by former Terre a Terre chef Oliver Hyde & his desire to create delicious food. Oli spent his formative years working as a chef & later established Juniper, an exclusive outside catering business.

In this time, Oli learned the importance of using only quality ingredients & treating key components to dishes with respect. Now, Oli has built a team of dedicated & like-minded individuals at Flour Pot.

# FLOUR POT BAK



# STEYNING BUTCHERS

**20 Years  
in Business**

Since 2009, Steyning local Mick Kemp has led the traditional butchers with the vision to provide fresh local quality meats to Sussex & its surrounding areas.

**Quality Local  
Produce**

Gary Griffiths (Founder) has grown tomatoes near Pulborough in West Sussex for 40+ years.

A true family affair as the expert team now includes Gary's wife Jenny, their son & daughter. Gary & Gary Junior tend to the crops whilst Jenny ensures every box contains the right mix + packed correctly.

**24 Hours  
Pick - Delivery**



Nutbourne is a firm favourite within the industry for the outstanding quality & flavour of their tomatoes.

## NUTBOURNE NURSERY LTD.

**12 Miles  
From Depot**



## BREAKY BOTTOM

In 1974, Peter Hall planted his East Sussex vineyard with Seyval Blanc & Muller-Thurgau, establishing Breaky Bottom's reputation making still white wines.

After 20 years, Peter shifts to sparkling wines after a lightbulb moment that Seyval Blanc would make a 'great fizz'. Following his first sparkling wine (with 100% Seyval Blanc), Peter has dedicated each cuvée to important friends & family. For example, the famous wood engraver & designer of the original label is celebrated in the 2010 Chardonnay/Pinot.

Today, the estate produces 11,000 bottles per year of traditional method sparkling wines with exceptional quality & character.

**One of the UK's  
Early Pioneers**



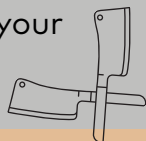
**Breaky Bottom**  
BRUT  
CHARDONNAY/PINOT  
2014  
COVEY MICHAEL WOODMAN  
SINGLE VINEYARD  
EST. 1974

*I've come to appreciate that the best wine is made in the vineyard. The winemaker's job is to let good grapes express themselves naturally.*

**Peter Hall  
(Winemaker)**



From homemade sausages to their own cured back bacon, Steyning delivers on all your meat needs.



**THE FLOUR POT  
BAKERY**

*Gap in the market*

*There were plenty of bakeries around at the time but none of them were producing the kind of bread I wanted to feed my family. I just knew that if we could produce the kind of bread I'd been dreaming of people would come along for the ride.*

**ERY**

*On Hyde (Owner)*







# The FoodHEROES®

## Launch of Koffmann's New Season Suffolk Baby New Potatoes.



On Thursday 6th July, The Food Heroes, in collaboration with their partners and growers, The Musketeers, hosted a launch event for the Koffmann's New Season Suffolk Baby New Potatoes, in Woodbridge, Suffolk.



Guests including potato growers & wholesalers enjoyed a tour of the potato fields, storage and packing facilities as well as having access to the on-site Museum, housing historical agricultural vehicles and equipment.



In the evening, guests had the pleasure of joining Pierre Koffmann along with many of The Food Heroes team for a drinks reception followed by a BBQ. In addition to a BBQ serving locally sourced meat cooked by chef Peter Harrison, guests had the opportunity to taste the produce & potato dishes served from the Koffmann's Air Stream including crispy garlic & herb baby new potatoes to Koffmann's skin on frites topped with cheese sauce & crispy bacon.





The Menu Partners

PRODUCT CODE: POTNEW





# Fresh Produce



## Veg

- Koffmann's new season Suffolk baby new potatoes, see p.6-7 to learn more.
- UK broccoli delivers versatility & colour to your dishes.
- Italian Borlotti beans offer a sweetish flavour with a smooth creamy texture.
- Mixed squashes from Bedlams Farm, Lincolnshire - organic & wide variety.
- UK & Spanish romanesco guarantee nutty flavour with crunchy texture.
- UK & Dutch yellow courgettes are readily available - sweet & succulent with firm texture.
- Globe artichokes in supply, a great yet under-utilised product in the UK.
- English marrows are ready to go - steam, bake, boil, fry or roast.
- UK corn on the cob in the husk - perfect for BBQ-style cooking in Summer.

## Mushrooms

- Morels (wild & cultivated) provide an intense nutty & earthy flavour with meaty texture.
- Scottish & European girolles - a sweet flavour suitable for most dishes.
- French Pied Bleu offers a distinctive flavour.
- Hen-of-the-woods provide an earthy, sweet, & distinctly truffle-like taste.
- Italian Summer truffles available - nutty flavour with crunchy exterior.
- Pink oyster & pied de mouton ready to go.

## Fruit

- English strawberries from our farm Featherbed Fruits in Oxfordshire, UK.
- English & European cherries, noted for their sweet, succulent flavour.
- English raspberries offer a sweet & juicy taste.
- Blood peaches are available, sweet yet pricey option.
- UK new season discovery apples deliver a fresh tangy tartness.
- Belgium new season conference pears in supply.
- French charentais melon - bright, sweet & fragrant.
- French muscat grapes & black figs are firm favourites.
- European apricots offer a distinct colour & soft taste.

## Salads

- Round lettuce from 7th generation family-run Gorehall in Southport, UK.
- Watercress from Sun Salads farms in Wiltshire & Dorset, UK.
- UK & Dutch baby cucumbers are firmly in supply.
- IOW tomatoes in-stock from Tomato Stall - 25+ varieties.
- Iceberg, cos, gem, red gem & celery from PDM growers in Shropshire, UK.
- Lollo Rossa & Biondi Lollo from D & J growers, Wiltshire.









SALT MOSS  
AGED WHOLE RIBEYE  
(aw 2x2.2-3.5kg)

PRODUCT CODE: MYB19

IRISH FOODS  
**Kettyle**

# ***PRODUCT FOCUS***



PORK BABY  
BACK RIBS FROZEN  
10KG

PRODUCT CODE: MFP046

CRINKLE CUT  
GHERKINS IN VINEGAR



PRODUCT CODE: M000208



# ESSENTIALS

from

**KraftHeinz**  
FOODSERVICE

## The Menu Partners Product Codes

- 1 Nearly **35%** of consumers want to see branded sauces as it gives them a good impression on the quality of food
- 2 Heinz sauces make consumers happy out of home with **72%** wanting to see Heinz on the table
- 3 Over **50%** of consumers use Heinz out of home and don't like seeing alternative brands
- 4 Over **75%** of consumers agree Heinz is the benchmark of quality for sauces







# ROCKWATER







MISO COD LOIN \*

Nestled right by the water, Rockwater is a stunning sea-facing restaurant & lifestyle hub in Hove.

Offering seaside favourites with local produce, seasonal seafood and Asian-inspired small & sharing plates.

Innovative dishes, freshly caught produce and cool, coastal vibes. An establishment not to be missed if you like good food, good cocktails and a picture-perfect view.

### *New Summer Dishes*

#### **Bar & Kitchen:**

**BEER BATTERED FISH \***  
18 Fresh Fillet, Crushed Peas, Fries, Tartar

**LOBSTER AND KING PRAWN ROLL**  
Fermented Fennel, Pickled Cucumber, Bisque Dressing, Summer Leaf, Fries

**GREEN GLOW PB**  
Farro, Roast Broccoli, Edamame, Baby Spinach, Avocado, Cured Cucumber, Toasted Pumpkin Seeds, Soft Herb and Lemon Dressing



GREEN GLOW PB

#### **Roof Terrace:**

**MISO COD LOIN \***  
Spinach and Chard Choi, Spring Onion Dashi

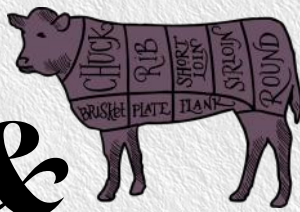
**BAVETTE STEAK**  
Shiitake, Teriyaki Jus, Kimchi, Wasabi

**BURRATA \* V**  
Green Tomato, Cucumber, Lemon Oil, Tempura

**@rockwaterhove | [www.rockwater.uk](http://www.rockwater.uk)**  
**Western Esplanade, Kingsway, Hove, BN3 4FA**



# Meat & Seafood



## Beef

- Recently prices eased down to £476p/kg after months of severe increases.
- Supply remains tight vs demand and imports are still expensive means recent significant downward pricing is unlikely to continue through 2023.

## Lamb

- Pricing has reduced back from the 2023 UK new season pricing, yet lamb remains expensive protein option.
- UK prices expected to loosely follow seasonal trends & reduce through 2023.
- Imported prices will edge upwards.

## Pork

- Trade experts describe pork supply as "persistently scarce" across Europe while demand is strong.
- African Swine Fever continues to flare up & constrict availability.
- Supply will constrict further through 2023 pushing prices upwards.
- These raw material prices will also flow through into processed products (hams, bacon & charcuterie).



## Poultry

- Chicken pricing to remain stable in 2023 with the reduced impact of AI.
- Duck availability improving after large culls of meat & breeding flocks in 2022.
- Many turkey farmers left industry following AI culls - tight supply for Christmas 2023.
- Breast meat demand & pricing is relatively unchanged, while drumsticks are considered a by-product.

## Fish

- Global stocks of salmon remain lower - keeps pricing high through 2023.
- Weekly spot salmon prices remain volatile in Scotland, Norway & Chile.
- Pollock prices have dropped & expect to remain low through 2023.



## Shellfish

- Demand for prawns remains depressed globally.
- Many farmers not restocking ponds due to low demand & prices.
- TMP have secured 6% cost reduction in prawns until end of 2023.



***In the spotlight...***



Seared Scallops, Pea Puree & Bacon. Queen Adelaide, Wandsworth, July 2023





Established in 1985, Princesse d'Isenbourg et Cie is one of the EU's finest Food Companies.

Providing products of the highest order to prestigious five Star Hotels, renowned Restaurants, Cruise Liners, prominent Airlines, International Wholesalers & 'high-profile' international Private Clientele.

***Princesse d'Isenbourg***

***Champagne "Princesse d'Isenbourg"***  
Product of France



***Black Truffle Oil - 235ml***  
Natural Black Truffle Flavouring



***Black Truffles - Aestivum***  
Fresh Black Perigord\* Truffles Seasonal



***Black Truffle Salt - 50g***  
Sea salt & dry pieces of Black Truffle





**enbourg et Cie<sup>®</sup>**



### ***Caviar Royal Beluga***

The Beluga Sturgeon lives for over 130 years and creates large, opalescent grey-blue Caviar with delicate skin and a palate-tickling flavour.

Caviar is a capsule of invigorating energy; filled with the proteins, minerals, vitamins and oils essential for life.



Served in Receptacles of:-

Vacuumed Transparent Twist-Off Glass Jars:-

12g, 15g, 20g, 25g, 30g, 50g

Vacuumed Metal Receptacles / Tins:-

125g, 250g, 500g and 1Kg (1000g)

Shelf-Life 3 x Months



**CAVIAR.CO.UK**



## UK Cheese

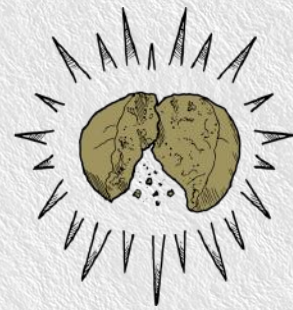
- Mild cheddar prices remained consistent (£3960 on avg.) - minimal price fluctuations.
- Current price stability suggests a bottom point & likely prices will remain steady over the next 1-2 months.
- We expect price increases later in the year in line with farmgate increases & rise in demand.

## Continental Cheese

- While European Milk prices experienced significant increases in 2023 - now some instances of deflation.
- High input costs for farmers & processors continue - expect price increases in Q4 as production declines.
- Farmers are likely to reduce cow numbers - reduced milk production.
- Expect limited movement for Greek & Cypriot cheeses (incl. halloumi & Feta) partly due to Greece's need to import milk to meet demand.

## Milk

- GB milk production forecast (2023/24) is projected to reach 12.38 billion litres (0.01% decrease on prev. milk year)
- Estimated 71 million litres reduction in milk compared to March forecast due to price fluctuations & unfavourable weather conditions.
- Stability is expected to persist in August, with potential increases in September as production levels decrease & stock levels reduce.
- Farmers are finding greater financial benefits in culling cows & selling carcasses.
- Experts predict potential increase of 6-8ppl in farmgate pricing in autumn.



# Eggs, Dairy & Bakery

## Cream

- Volatile prices due to cream supply abundance in the continent & minimal price differentials - demotivates EU buyers to import from UK.
- Prices have now stabilized & minimal movement is anticipated for August.
- Expect trading prices to gradually increase during Autumn & Winter based on demand.
- Experts predict substantial price increases (10-20%).



# BROOKFIELD — BARN —

## **A picturesque barn venue to capture your heart and imagination**

Situated in the heart of rural West Sussex, surrounded by acres of countryside and perched beside a tranquil brook, lies Brookfield Barn; an exclusive-use wedding venue offering several stunning and unique spaces, each with its own spectacular view.



Photo by Studio Rouge Photography

Fillet of beef with fondant potato, wood-fired spring  
onions, piquillo peppers & salsa verde

**brookfieldbarn.co.uk**



# Dry Goods, Oils & Sundries

## Spices

- Raw material costs are volatile due to rising awareness of spice benefits, demand for ready-to-use mixes & popularity of ethnic cuisines.
- Extreme weather patterns are negatively impacting the industry - crop yields & production.
- Opportunities for increased yields exist in some areas.

## Rice

- Expect global rice market to remain strong due to supply constraints.
- Droughts in the main growing areas may result in smaller crop sizes - impact demand & availability.
- Availability of EU compliant rice (e.g. Basmati rice from Pakistan/ India) may reduce due to using pesticides.

## Water

- Recent water price increases are due to inflation & rise in energy costs.
- Material suppliers face challenges in providing price indications due to the highly volatile Gas & Electricity markets.



## Sugar

- Prices have spiked to an 11-year high due to increased demand & adverse weather conditions.
- Key sugar-producing countries (India, Thailand, China & Pakistan) experienced significant downward crop revisions - upward pressure on prices.
- Market projections suggest sugar prices will remain above historical levels (21-24 cents per pound).

## Olive Oil

- Delay in rain arrival & water scarcity in Mediterranean has negatively impacted supply.
- Uncertainty for 2023/24 season in Spain & Greece due to lack of rain.
- If low rainfall, high temperatures & limited water reserves persist - reduced availability & quality.
- Expect extended period of high olive oil valuations from various origins & grades.

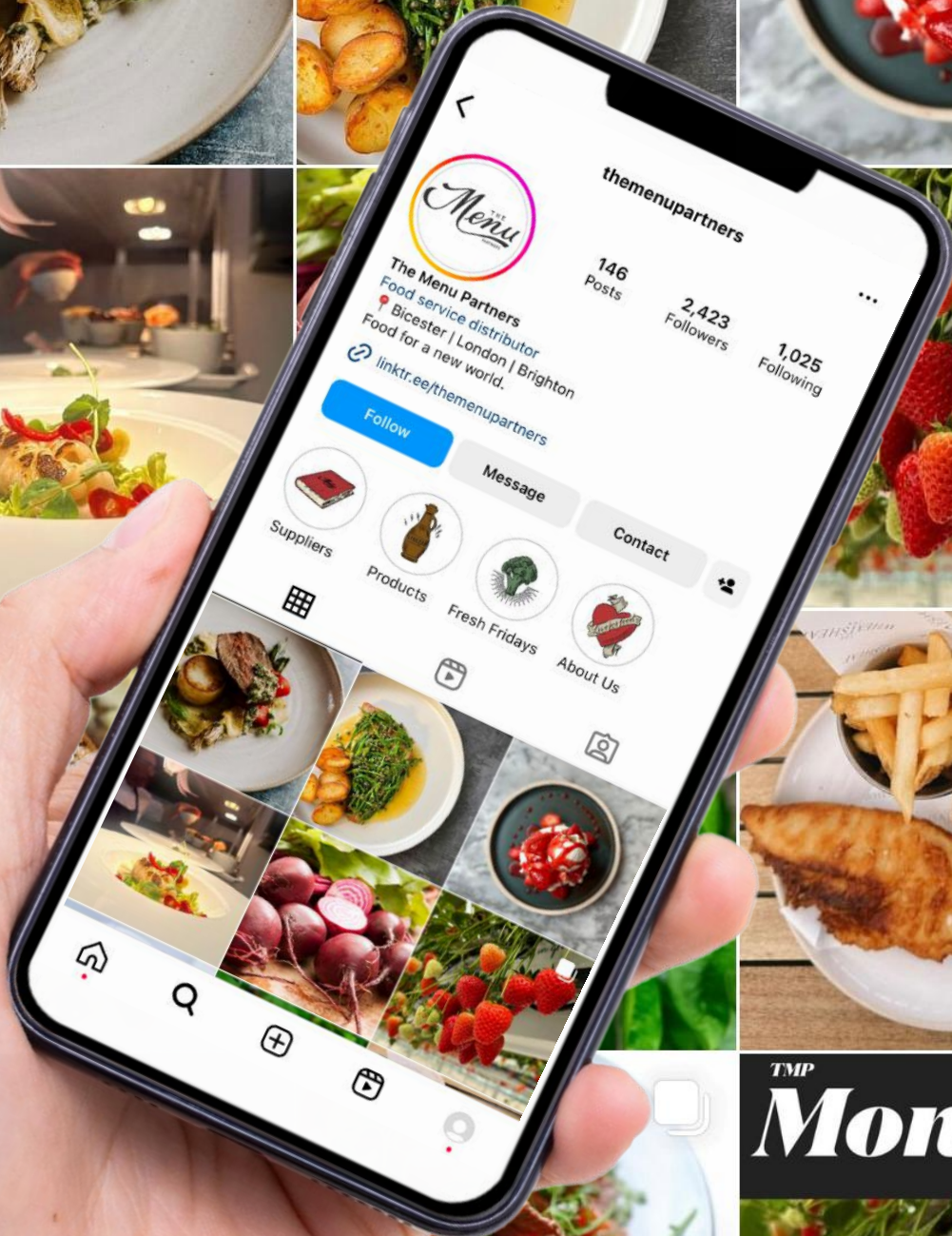
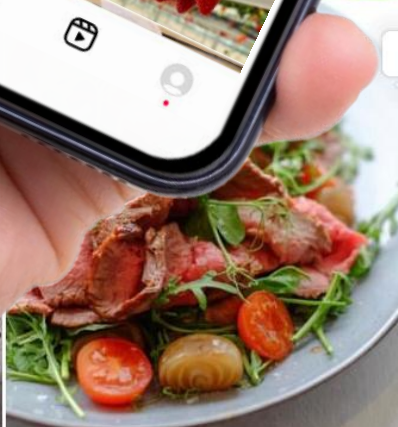
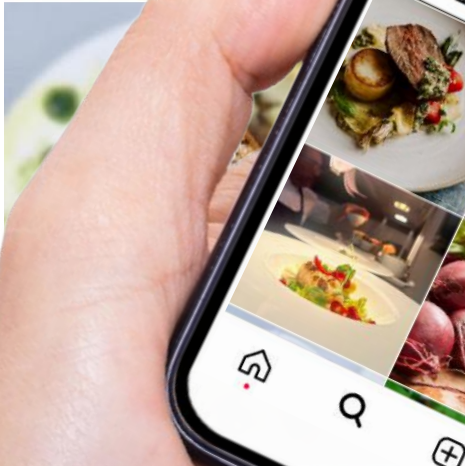
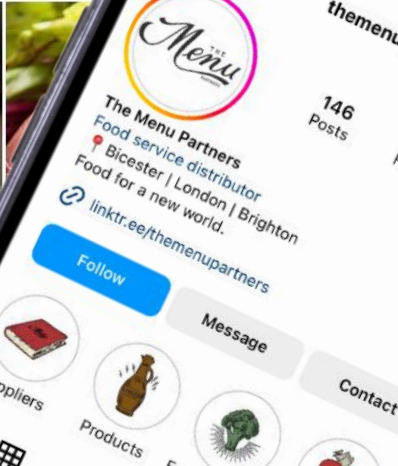


# FOLLOW US!

@themenupartners

Don't forget to tag us in your food pics!

SCAN ME



TMP  
**Monthly**  
July 2023





# THE Menu PARTNERS



The Menu Partners



@themenupartners



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