

France's industrial food revolution (A)

Springtime. A couple wander, arms interlinked, through Paris at its most photogenic. After a leisurely morning browsing bookshops and markets, their thoughts turn to food and the cosy looking bistro at the end of the street. They secure one of the last outdoor tables and order from a lengthy menu of French classics. Wine is poured and, seemingly within minutes, the waiter sets down a Nicoise salad and duck cassoulet. All they are aware of is another afternoon of pleasant experiences unfurling before them. They don't hear the intermittent ping of the microwave above the animated chatter and background music. Nor do they see the cool room stacked with ready-made meals.

Kitchen shortcuts

Similar scenes played out every day across France, especially in areas with high tourist traffic. Indeed, the practice of using industrially prepared foods in place of fresh ingredients cooked in-situ was growing. "The odds are sadly good you'll be eating a pre-prepared dish or two if you dine out at the low to mid-level of the Paris food chain", said Alexander Lobrano, food writer and former European Editor of *Gourmet*.¹ In 2010, a French documentary team found widespread evidence of restaurants using minimally trained catering staff to reheat frozen meals which were then served to unwitting customers at heavily inflated prices. One of the investigators believed this situation was very much the norm. Several years later, little had changed.

An April 2013 survey conducted for the National Union of Hotel, Restaurant and Cafe Operators (Synhorcat) found that close to one third of respondents reported using pre-prepared meals and other processed foods. On average, one quarter of dishes they served

This case was written by Marinella Padula, Australia and New Zealand School of Government, for Dr Michael Di Francesco as a basis for class discussion rather than to illustrate either effective or ineffective handling of a managerial situation.

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¹ Viscusi, G. "The dirty secret of many French 'restaurants'" 28 June 2013, www.traveller.com.au Accessed: February, 2015.

were wholly or largely created elsewhere. Results did not include fast-food purveyors.² The vast majority of those polled ran independent eateries with fewer than 10 employees. Overall, multi-outlet cafés and restaurants were somewhat more likely to utilise packaged meals and similar products than independent eateries.³ Extensive use of offsite catering services and convenience foods was not a new phenomenon, whether in France or elsewhere in Europe and North America. Products like powdered stock had been in common use commercially since the 1960s, while frozen foods had been infiltrating restaurant kitchens for at least two decades.⁴ However many observers saw the survey as further confirmation of France’s steady decline as the world’s gastronomic leader. Some insiders asserted the practice was far more prevalent than the hospitality industry was willing to acknowledge. “If a third admit to it, then the real number must be about half,” said Alain Fontaine, owner of traditional Parisian bistro Le Mesturet.⁵ Internationally acclaimed chef/restaurateur Alain Ducasse, who had long promoted French gastronomy, believed as many as 75 percent of cafés and restaurants were taking similar shortcuts.⁶ Another industry survey put the figure even higher, claiming that 85 percent of restaurants served industrially-prepared foods without disclosing their origins.⁷

Ducasse and fellow gourmet luminary Joël Robuchon had devised their own “Restaurant de Qualité” accreditation in 2013 for establishments that exemplified the best aspects of French cuisine, though Ducasse believed that only 10 percent of France’s 100,000 restaurants would qualify, since the vast majority “only do industrial cooking”.⁸ Six years earlier, the French government introduced a “Maître Restaurateur” designation for establishments using at least 60 percent fresh ingredients. By 2013, there were just 600 recipients.⁹ Costs were a key part of the move away from freshly prepared dishes and catering companies had no shortage of attractive solutions.

When Alexandre Castagnet took over a small bistro in the Marais district, he discovered two huge freezers where the previous owners kept all their pre-prepared meals.¹⁰ He was soon approached by sales representatives from major industrial food companies such as Davigel, the Brakes Group, Bonduell and Metro, who came well equipped with glossy brochures (*Exhibit A*) and detailed profit calculations outlining how much operators could expect to save. Castagnet recalled a salesperson explaining how a €0.5¹¹ chocolate cake was created to look “homemade” and sold on to the diner for €6. Indeed owner/chefs could leaf through a bewildering array of products ranging from basic items such as pre-chopped onions to gourmet dishes like foie gras with caramelised apple.¹² One firm, for example, offered scallop and cod cassoulet with Riesling sauce at €2.75 per serve, mandarin and prawn salad

² “Etude d’impact de la réglementation appellation ‘Restaurant’” Syndicat National des Hoteliers, Restaurateurs, Cafetiers et Traiteurs, April 2013, www.synhorcat.com, Accessed: February 2015.

³ Ibid

⁴ Parussini, G. “France’s Plat du jour: frozen meals” *The Wall Street Journal*, 18 May 2013.

⁵ Op cit.

⁶ Sage, A. “French have fill of restaurants’ pre-cooked food” *The Sunday Times*, 1 June 2014.

⁷ Porter, L. “The real problem with French food? It’s boring” *The Telegraph*, 15 July 2014.

⁸ “France, of all places, finds itself in a battle against processed Food” *New York Times*, 30 January 2014.

⁹ Allen, P. “The French chef’s secret ingredient: microwaved ready meals” *The Daily Telegraph*, 22 February 2010.

¹⁰ Op cit.

¹¹ As at April 2015, one Euro (€) was worth \$1.40 Australian dollars (AUD).

¹² Alderman, L. “France, of all places, finds itself in a battle against processed Food” *New York Times*, 30 January 2014.

for €9.25 a kilo, and salmon and sorrel terrine for €10.50 a kilo.¹³ Castagnet was told that if he replaced enough items, he could even cut back on an employee.

Products were available in many different forms: frozen, chilled, sous vide (vacuum packed), pre-cut/portioned or par-cooked to maximise efficiency and consistency while minimising waste. Improved technology and logistics over the past two decades had resulted in substantial quality gains; seasoned experts could sometimes struggle to distinguish bought-in products from house-made. Companies often also provided advice on how to present dishes and design menus. There was a constant stream of new releases to reflect seasonal demand and emerging trends; many items were developed in consultation with leading chefs, even those critical of the industrial approach such as Alain Ducasse. Though high-end restaurants were less likely to rely on pre-made product, they were by no means immune to temptation.

Davigel (owned by Nestlé) was France's largest food service corporation with branches in 10 different countries. The company recorded annual sales of €792 million and served a wide range of clients, from school cafeterias and nursing homes to airlines and hotels. Established in 1968, Davigel had three French processing plants and some 3000 employees producing close to 50,000 tonnes of food per annum¹⁴ for a reported 66,000 clients.¹⁵ British-based Brakes followed close behind, distributing more than 3000 different food products to 43,000 clients across France and generating €592 million in revenue during 2011.¹⁶

Castagnet, at least, was not moved by sales pitches: "If you run your kitchen right, it is just as cost-effective to use fresh products," he said.¹⁷ Nonetheless, it was hard to compete on price. At Xavier Denamur's Les Philosophes, duck confit sold for €25 as opposed to €16 at a nearby bistro.¹⁸ Labour costs alone accounted for 45 percent of restaurant overheads (the biggest single expense) and had increased by 40 percent since 2000.¹⁹ The cost of food had also risen. "Businesses are making an economic choice," said Hubert Jan, a representative of the French restaurant and hotel union, L'Union des Métiers et des Industries de l'Hôtellerie (UMIH), of the move towards heat-and-eat cuisine.²⁰ Profit margins were notoriously tight and under constant pressure – even with heavy use of industrial foods. Full-service restaurants also tended to operate under tighter margins still.

Jan also remarked upon a "dearth of skilled kitchen workers", lamenting that "people aren't willing anymore to rise at 2am to make bread or pastries".²¹ Chefs committed to making all or most of their dishes faced long shifts and arduous work. Twelve-to-sixteen hour days were not unusual. By contrast, a largely pre-made menu allowed shorter workdays and enabled kitchen-hands to fulfil the majority of tasks. "If I just reheated industrial dishes, I could show up at 11 am and have half the staff," remarked chef Pascal Brot, whose typical day began at 7.15am and didn't finish until at least 11.30pm.²²

¹³ Sage, A. "French have fill of restaurants' pre-cooked food" *The Sunday Times*, 1 June 2014.

¹⁴ "Our Company" Davigel, www.davigel.fr Accessed: February 2015.

¹⁵ Viscusi, G. "The dirty secret of many French 'restaurants'" 28 June 2013, www.traveller.com.au Accessed: February, 2015.

¹⁶ Ibid

¹⁷ "France, of all places, finds itself in a battle against processed Food" *New York Times*, 30 January 2014.

¹⁸ Ibid

¹⁹ Ibid.

²⁰ Ibid.

²¹ Ibid.

²² Viscusi, G. "The dirty secret of many French 'restaurants'" 28 June 2013, www.traveller.com.au Accessed: February, 2015.

Changing tastes, altered habits

Many factors were implicated in the rise of microwave gastronomy. Chief amongst them was a cash-conscious public strapped for time: “We are now facing a restaurant consumer who is permanently looking for low prices, clever purchases and the opportunity to seize a promotional offer,” said Bernard Boutboul, Managing Director of Gira Conseil, a leading food industry consultancy. “This behaviour is generally dragging the sector downmarket.”²³ According to the company’s research, only 14 percent of meals eaten outside the home took the traditional three-course format compared to 75 percent in the mid-1990s.²⁴

“The destruction of the three-course meal has been phenomenal in such a short period of time,” he said, “The change is very rapid for a country like France that is attached to traditions, or at least which used to be attached to traditions. In fact, traditions are being lost because we no longer value our culinary heritage.”²⁵ He noted that the customary entrée-main-dessert combination was “too long, too rich and too expensive” when the average French person spent 32 minutes at the table, compared with 90 minutes in 1975.²⁶ This trend was most pronounced at lunchtime where the typical break clocked in at just 22 minutes²⁷ and fewer than four percent of meals involved three courses.²⁸ France’s adoption of the 35-hour working week (across most industries) in 2000 was deemed partially responsible. Writing in *The Times*, Adam Sage described the impact on one Parisian restaurateur:

“When Robert Vidal took over the Le Sully, an elegant brasserie in Central Paris, 30 years ago, his customers ordered foie gras, sole, scallops and filet of beef. They spent between €35 and €40 per head at today’s prices and meandered back to the office in late afternoon in cheery mood after a glass or two of Pommerol or Gevrey-Chambertin. Now, diners pop in for an omelette, a quiche du jour or a lasagne and their average bill comes to a meagre €14 per head. The starter is almost unheard of and the wine has been replaced by water or Diet Coke.

‘They think they have to be 100 per cent when they go back to the office and that if they have too much to eat they’ll nod off,’ Mr Vidal, 65, said, holding a glass of Pouilly-Fumé as if to prove that not all Frenchmen have forgotten their roots. He is bewildered by the changes he has witnessed at the helm of his brasserie, which has been in his family for 99 years. ‘In the old days, Le Sully was full to bursting at 5.30pm when people stopped work. Colleagues came in to chat, the guys met their girlfriends here and friendships were struck. These days, they leave the office at 4pm and they’re in such a hurry to get home that no one comes in here. People used to drink, smoke and enjoy themselves. Now, they don’t smoke, they don’t eat and they don’t drink. They’ll soon stop having sex as well’.²⁹

At the same time, France’s appetite for fast food had grown considerably, helped along by the after-effects of the 2008 Global Financial Crisis. In 2012, fast food took 54 percent (€34 billion) of the out-of-home dining market, according to Gira Conseil. This was up from 40 percent in 2011. “In previous years, we could see fast food was gaining ground, but this is the first time it has overtaken restaurants where you are served at the table... Before it was mainly sandwiches and hamburgers, today an array of thematic outlets offering salads, bagels

²³ Sage, A. “Cash-conscious French say au revoir to the long lunch” *The Times*, 27 September 2010.

²⁴ Ibid.

²⁵ Ibid.

²⁶ Ibid.

²⁷ “Lunch breaks now just 22 minutes”, *The Connexion*, 28 September 2011, www.connexionfrance.com, Accessed: March 2015.

²⁸ Op cit.

²⁹ Sage, A. “Cash-conscious French say au revoir to the long lunch” *The Times*, 27 September 2010.

or kebabs are strangling traditional restaurants,” said a company spokesperson.³⁰ The fortunes of old foes had also improved. Once a culinary interloper met with protests and hostility, McDonalds now had a steady foothold in France, the company’s second most profitable market outside the USA.³¹ However, it was bakeries and supermarkets that had gained the most from shifting spending patterns. Good-quality take-home meals were also widely available and popular with time-pressed workers at dinner.

Besides economic factors, observers pointed to other influences. In his book on the country’s dwindling culinary dominance, *Au Revoir to All That*, wine writer Michael Steinberger noted that a certain complacency had crept into French cooking and that France’s Michelin restaurant guide – once the undisputed arbiter of fine dining – failed to reflect the culinary zeitgeist.³² Meanwhile, from 2010 to 2013, no French restaurant managed to breach the Top 10 in San Pellegrino’s list of the World’s 50 Best Restaurants.³³ Writing in *The Telegraph*, Lizzie Porter expressed a long held view amongst many critics that the French food scene was staid and uninspiring: “Inspecting a restaurant menu in London is a delight: do I go for aubergine with za’atar, a modern Sunday roast – maybe roast meat with braised shallots and watercress – or suckling pig with piquillo peppers? In Paris, it’s a bore: you know there will be the same tired offering of magret de canard, steak frites, and limp salmon with overcooked green beans nigh on everywhere you go.”³⁴ She added:

“Broadly speaking, cooking from France’s naturalised immigrants – from the Magreb and Sub-Saharan Africa, for example – is sidelined. Middle-class Parisians will deign to eat couscous or a tagine, but this seems ever only to be in specifically Moroccan, Algerian or Tunisian restaurants. Foreign cooking methods and ingredients are not incorporated into the thick cookery bibles of what is considered ‘French’.”³⁵

High levels of bureaucracy, restrictive labour laws and prohibitive set-up costs were also blamed for the lack of innovation.³⁶ Yet many of the same obstacles existed in more dynamic destinations. Looking across the Channel and Atlantic, cities such as London and New York had raised their game considerably over the past decade. Tokyo, Copenhagen and San Sebastian had also emerged as serious rivals. As fine dining had come under pressure across the world’s capitals, restaurateurs sought to adapt to a new climate and a new generation of diners. Starched tablecloths and lengthy degustation dinners increasingly gave way to share-plates and gourmet versions of global street food favourites. At the same time, increased interest in health and sustainability had prompted a greater emphasis on provenance. Operators were eager to highlight their use of local, organic or artisan supplies and house-made products.

³⁰ Samuel, H. “Fast food overtakes traditional cuisine in France for the first time” *The Telegraph*, 28 February 2013.

³¹ Wile, R. “The True Story Of How McDonald’s Conquered France” *Business Insider*, 22 August 2014, www.businessinsider.com.au, Accessed: March 2015.

³² “Where it all went wrong for French food” *Encore! France* 24, 16 February 2011, www.france24.com, Accessed: March 2015.

³³ “The World’s 50 Best Restaurants” S. Pellegrino, www.theworlds50best.com Accessed: March, 2015.

³⁴ Porter, L. “The real problem with French food? It’s boring” *The Telegraph*, 15 July 2014.

³⁵ *Ibid.*

³⁶ Gilbert, G. “Gallic gourmets are putting French cuisine back on the culinary map” *The Independent*, 26 May 2012.

In 2010, the United Nations Educational, Scientific and Cultural Organization, (UNESCO) declared the “French gastronomic meal” as one of the world’s “intangible cultural treasures”. Though the definition of “gastronomic meal” was deliberately vague, for some, the announcement was a sign that France’s culinary supremacy was already a relic. “Food is alive, but we try to make museums rather than gardens,” acknowledged Luc Dubanchet, founder of the Omnivore food festivals, who nonetheless pointed to a new wave of French chefs (often young foreign nationals or returned expatriates) determined to reinvigorate the French food scene and enjoying growing recognition.³⁷ They avoided prestige locations, rigid codes and Michelin stars and, for people like Dubanchet, proved that change was possible.

Reclaiming the crown

By 2013, the situation had become a matter of national importance. French parliamentarian Daniel Fasquelle believed that increased reliance on pre-made foods was an affront to French culture and a risk to the more than 400,000³⁸ people employed in the sector: “The use of industrial foods in restaurants is a growing global phenomenon. But for France, we’re talking about our heritage. If we don’t do anything, in 10 years, real restaurants will be the exception.”³⁹ Public confidence in restaurant integrity wasn’t especially high. A 2013 survey of 1000 French diners found that almost three quarters believed that they had been served frozen food in a restaurant. They also estimated, on average, that 50 percent of restaurant dishes had been bought-in; approximately one in three respondents believed that more than 80 percent of restaurant dishes were factory-made.⁴⁰ Some 300 restaurateurs were also surveyed, the majority of whom reported customers asking about the origin of their dishes.⁴¹ There was near unanimous support for greater transparency amongst diners and strong support amongst the restaurateurs polled.⁴²

Restaurateurs and industry observers also worried about the impact on up-and-coming professionals who completed years of intensive training only to end up reheating food. Anecdotal reports indicated that disillusionment had already prompted many apprentice and experienced chefs to quit the trade or emigrate. This, Michael Steinberger suggested, was one reason why places such as London had gained ground in recent years.⁴³ The threat to the nation’s tourism industry was another concern. France was the world’s most popular destination in 2013, attracting close to 85 million international visitors.⁴⁴ Food was a big drawcard, with more than a third of prospective visitors to Paris nominating fine dining as their top priority.⁴⁵ Overall, tourism contributed €79.4 billion to the French economy in 2013 (3.9 percent of total GDP).⁴⁶

³⁷ Ibid.

³⁸ Viscusi, G. “The dirty secret of many French ‘restaurants’” 28 June 2013, www.traveller.com.au Accessed: February, 2015.

³⁹ “France, of all places, finds itself in a battle against processed Food” *New York Times*, 30 January 2014.

⁴⁰ “Le label ‘Fait maison’ Regards croisés grand public/Professionnels: Résultats détaillés’ l’Institut Français d’Opinion Publique, 11 October 2013, www.ifop.com, Accessed: March 2015.

⁴¹ Ibid.

⁴² Ibid.

⁴³ “Where it all went wrong for French food” *Encore! France* 24, 16 February 2011, www.france24.com, Accessed: March 2015.

⁴⁴ Attwooll, J. “Vive le tourisme! France is still the world’s most popular country” *The Telegraph*, 12 August 2014.

⁴⁵ Parussini, G. “France’s Plat du jour: frozen meals” *The Wall Street Journal*, 18 May 2013.

⁴⁶ “Travel & Tourism Economic Impact 2014:France” World Travel and Tourism Council, March 2014, www.wttc.org Accessed: March 2015.

Fasquelle and others feared that an erosion of standards would not only lead to reduced patronage and reputational damage but loss of local variation and increased homogeneity. “It’s not right,” said Alain Fontaine, manager of Le Mesturet in Paris, “We are going to atrophy our senses.”⁴⁷ Said Fasquelle: “We are supposed to be the land of gastronomy, but someone had to set up a website to find real food...I don’t want to be left with a few starred restaurants no one can afford and then everyone else eating the same thing.”⁴⁸ In 2013, he proposed the introduction of a law restricting the use of the term “restaurant” to establishments that prepared their food, fresh, on-site. This would be similar to 1998 legislation limiting the use of “boulangerie” to bakeries that made their own dough – a development credited with improving the standard of French bread. For Fasquelle, the goal was not to eradicate fast-food and casual eateries but give genuine chefs a chance to stand out. However, an adviser to Commerce and Tourism Minister, Sylvia Pinel, was concerned that stripping thousands of restaurants of their title could prove “divisive”.⁴⁹ The Government, however, was keen to respond to the issue and instead suggested the introduction of a “homemade” designation that could alert diners to dishes made from scratch.

The industry response to the proposals varied. Many restaurateurs welcomed such initiatives, though some feared they would be driven out of business. Others questioned whether any of these ideas would really improve quality or the customer experience. “If a chef uses frozen onions to save time and costs, does that really need to be pointed out?” asked President of Synhorcat Didier Chenet.⁵⁰ Ignace de Villepin, marketing director of Davigel, argued that there was a legitimate place for bought-in items, “When you identify something as frozen, you put it in the head of the consumer that it might be less good. That is wrong, but they may be less inclined to choose it.”⁵¹ In de Villepin’s view, it was more important for diners to feel “that what is on my plate looks and tastes good, that I’m enjoying my experience in the restaurant, and I want to come back”.⁵²

Catering and restaurant consultant David Read agreed that fresh was not always best: “Sometimes fresh vegetables don’t taste as good as vegetables that have been picked exactly when ripe and frozen properly...I love fresh vegetables, but you can’t run a chain of restaurants like that.” Moreover, it was sometimes preferable to outsource, “Often, a bakery can provide much better bread and pastries than a restaurant can make themselves. It doesn’t make it a bad restaurant,” he said.⁵³ Though for restaurateur Xavier Denamur, the issue was clear cut: “It’s the client’s right to know what’s on the plate”, he said, “Otherwise it’s fraud.”⁵⁴

⁴⁷ Cody, E. “French restaurants acknowledge serving factory-frozen food” *Washington Post*, 9 July 2013.

⁴⁸ Viscusi, G. “The dirty secret of many French ‘restaurants’” 28 June 2013, www.traveller.com.au Accessed: February, 2015.

⁴⁹ Ibid.

⁵⁰ “France, of all places, finds itself in a battle against processed Food” *New York Times*, 30 January 2014.

⁵¹ Ibid.

⁵² Ibid.

⁵³ Guttman, A. “France Battles Scourge Of Ready-To-Eat Meals In Restaurants” *The Salt*, National Public Radio, 8 July 2013, www.npr.org/blogs/thesalt Accessed: March 2015.

⁵⁴ Parussini, G. ‘France’s Plat du jour: frozen meals’ *The Wall Street Journal*, 18 May 2013.

Exhibit A: Davigel presentation excerpt



Starters

Davigel offers a variety of high-quality, beautifully presented starters: gourmet cold and hot appetizers, traditional and original puff pastries, individual and multiportion quiches and savory tarts, pizzas and snacks, chilled salads. Products are easy to use and ready to serve. Exclusive technology to heat our snacking products. Perfect rising during cooking.



Prepared meals

Davigel offers a wide variety of prepared meals, made using original recipes: meat & fish prepared meals, complete prepared meals, stuffed vegetables, gratin dishes, cheese specialties, take away complete meals and a selection of products vacuum-cooked for 3 to 7 hours at low temperature. Healthy products made with stringently selected ingredients for a perfect combination of savours and flavours.



Fish & Shellfish

Traditional know-how. 40 years of experience in selecting and processing fish and shellfish. Davigel offers a wide range of fish-based products tailored to every type of catering. Simple recipes in reply to consumer concerns about their well-being. Prawns, crab, scallops, squid, fish fillets, fish specialties, elaborated fish recipes, fish kebabs, exclusive "browned" white fish with less than 3% fat.



Meat & Poultry

Davigel provides you with recipes with meat and poultry adapted to all kind of budgets. A complete collection of products for children and adults alike: beef, lamb, pork, chicken, turkey, duck, Guinea fowl & rabbit, 100% sliced delicately flavored, hand-assembled kebabs. Traditional know-how in poultry stuffing and meat glazing.



Vegetables & Side dishes

Davigel offers a perfect assortment of attractive, colorful, easy to use crisp vegetables and side dishes. Traditional and exotic recipes. Ready to be warmed products cooked within 10 minutes, giving excellent flavor, texture and taste. Practical: products are served in individual portions for better cost control.



Desserts

Davigel offers a select choice of simple or sophisticated desserts. High-quality products with a "home-made" look: mini desserts, sweet cocktails, individual desserts, desserts to share, cakes, bakery. Davigel's traditional know-how in tart-making.

Source: Davigel, "Culinary Creation: A matter of Chefs"

<https://www.davigel.fr/france/fr/MicroSite/Pages/export-culinary-creation-v2-2011.aspx>

Accessed: March 2015.