



The School Nutrition Trends Report 2017

SUMMARY

2017 TRENDS REPORT

Summary of Research Findings

The School Nutrition Association (SNA) is continually monitoring the school foodservice arena to remain abreast of the trends, issues and factors impacting its members. As part of this effort, the Association periodically surveys its members to determine how trends and “hot” issues are affecting school nutrition operations. The *2017 School Nutrition Trends Survey* is one such effort. This survey was conducted in August/September 2017 and netted 515 responses from SNA director-level members (usually the District Director) who are based in 515 unique school districts nationwide. Major findings are summarized below.

Menu Trends

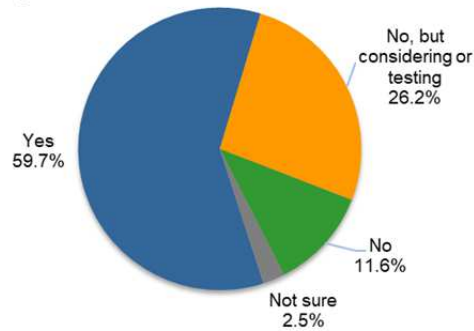
The survey explored key trends related to international flavors, customizable menu options and clean labels. Additionally, districts shared what innovative changes they are making for the 2017-18 school year.

International Flavors

Nearly 60% of districts report offering a new menu item that features international flavors, and 26.2% are considering or testing.

Offering New Menu Items Featuring International Flavors

For the 2017-18 school year, is your school nutrition program offering any new menu items that feature international flavors?



Customizable Menu Options

Offering customizable menu options is the norm. 87.4% of the districts report offering a customizable menu option for students. The most prevalent type of customization option is salad/produce bars or made-to-order salads. Just over half report offering entrée bars or stations where students choose their own ingredients. Self-service flavor stations or options that allow students to add seasonings, spices or sauces to their meals is also a widely available option.

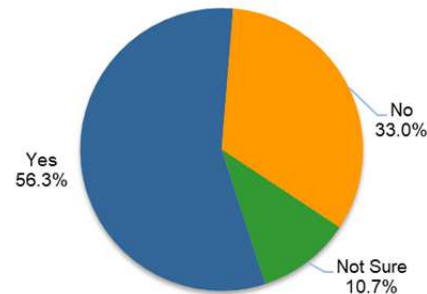
	Customizable Menu Options
Salad/produce bars or made-to-order salads	68.6%
Other entrée bars/stations or made-to-order options that allow students to choose their own ingredients	51.1%
Flavor stations or self-service options that allow students to add seasoning, spices or sauces to their meals	45.8%
Do not offer students any of these customizable menu options	13.3%



Cleaner Labels

Over half (56.3%) of districts report serving cleaner label menu options (e.g. products or ingredients with no artificial flavors, colors or preservatives). Of these districts, 81.1% are seeking additional cleaner label menu options. Among districts not currently serving cleaner label products or ingredients, 38.8% report that their program is seeking cleaner label menu options. Serving cleaner label menu options is most common in the largest districts.

Cleaner Label Menu Options
Is your school nutrition program currently serving menu options with a cleaner label?



Sodium & Whole Grain Rich Requirements

Methods to Reduce Sodium Content

Districts report utilizing multiple methods to reduce sodium content in school meals. The typical district surveyed is using 3 of these 5 methods to reduce sodium. The most prevalent method is using new lower-sodium menu items and recipes, followed by reformulating recipes and increasing scratch preparation of foods. Just over half report limiting service of condiments to reduce sodium. Just over one-third have reduced portion sizes to reduce sodium content.

Districts also indicated methods being considered to meet future sodium limits. Increasing scratch preparation of foods, reducing portion sizes and limiting condiments were each identified by approximately 20% of districts.

	Utilized	Being considered
Use of new lower-sodium menu items/recipes	93.9%	4.1%
Reformulated/ing recipes	73.4%	12.9%
Increased/ing scratch preparation of foods	60.7%	21.1%
Limited/ing service of condiments	56.6%	17.4%
Reduced/ing portion sizes	34.2%	21.1%

Sodium Challenges

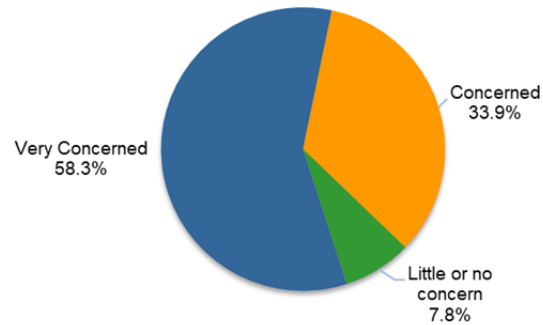
There is concern among the respondents with regard to the availability of foods that meet future sodium reduction targets and are well accepted by students. 58.3% of the respondents state that they are “very concerned” about this issue; 33.9% are “concerned.” Only 7.8% have little or no concern.

Student acceptance or familiarity with reduced sodium foods is the most prevalent challenge faced by districts – identified by 87.5% of districts. Additionally, more than half identified this as the biggest challenge.

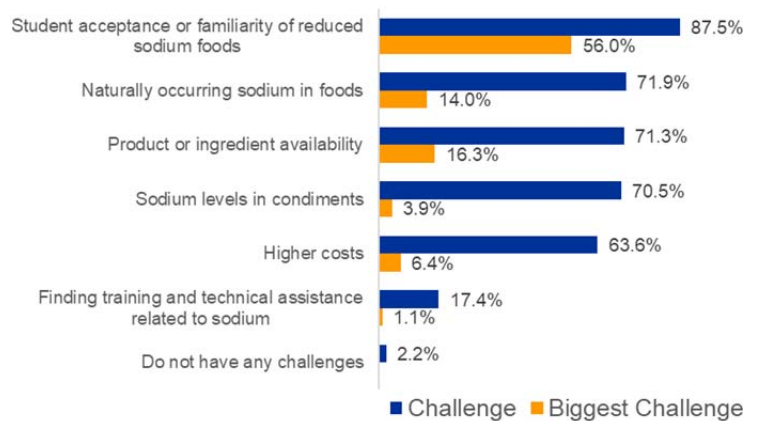
Product or ingredient availability and naturally occurring sodium in foods are strong secondary challenges, each noted by approximately 70% of districts and identified as the biggest challenge by between 14% and 16% of districts. Sodium levels in condiments was also identified as a challenge by 70% of districts, but was less frequently identified as the biggest challenge. Higher costs were identified as a challenge by over 63.6% of districts. Smaller sized districts tended to identify this challenge more frequently.

Concerns with Sodium Limits

How concerned are you regarding the availability of foods that will meet future sodium limits and are well accepted by students?



Challenges Meeting Future Sodium Limits



Methods to Increase Acceptance of Whole Grain Products

Districts report utilizing multiple methods to help increase student acceptance of whole grain foods in school meals. The typical district surveyed is using 3 of these 4 methods. Use of white wheat for a lighter appearance, testing multiple products/recipes and student taste testing to promote/gather feedback are each being utilized by at least 70% of districts surveyed. Gradually increasing the amount of whole wheat flour in recipes is the least prevalent method currently.

	Utilized	Being considered
Use of white wheat for a lighter appearance	79.8%	10.2%
Testing multiple products/recipes	77.4%	7.6%
Student taste tests to promote/gather feedback	70.2%	13.4%
Gradually increasing the amount of whole wheat flour in recipes	38.8%	17.0%

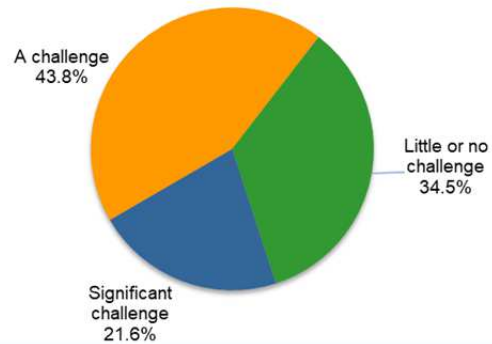
Whole Grain Rich Challenges

The mandate that all grains offered in school meals be whole grain rich is also considered by many to be a challenge, but to a lesser degree than the sodium reduction targets. Nearly 22% rate this issue as presenting a “significant challenge;” 43.8% rate it as a “challenge.”

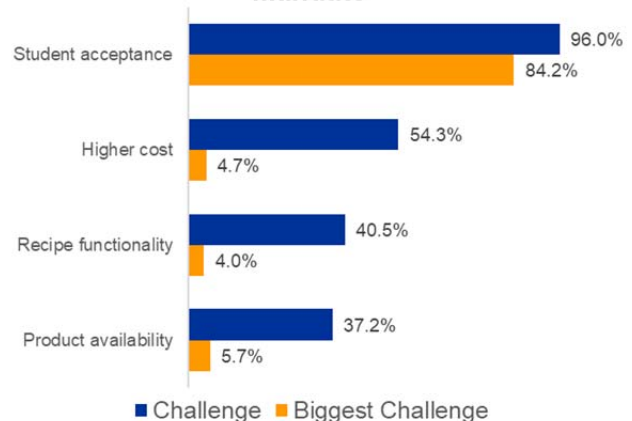
Student acceptance is the issue of greatest concern with regard to the whole grain rich mandate. Among those who perceive the mandate as a challenge, 96% cite student acceptance as a challenge and 84.2% indicate it is the biggest challenge. Higher costs are a strong secondary factor with more than half identifying it as a challenge.

Whole Grain Rich Challenge

Is the mandate that all grains offered with school meals be whole grain rich a challenge for your program?



Challenges Meeting Whole Grain Rich Mandate



Nearly half of districts identified pasta/noodles as the whole grain rich product that presents the biggest challenge for their program in meeting the whole grain rich mandate. There were significant regional differences in what products were identified as being the biggest challenge. In the Southeast, approximately 40% of districts identified biscuits as being a challenge while tortillas were more frequently identified as being a challenge in the Southwest.

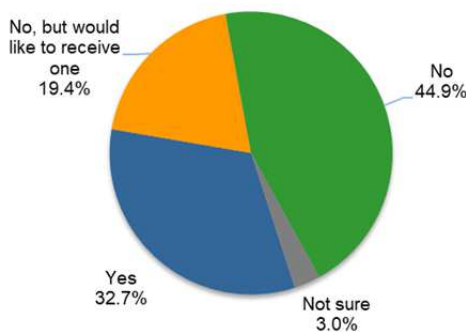
Whole Grain Rich Product that is the Biggest Challenge	
Pasta/noodles	49.9%
Biscuits	13.2%
Bread/rolls/buns	8.6%
Pizza crust	8.3%
Tortillas	7.4%
Snack items	4.0%
Rice	2.8%
Breakfast pastries	2.5%
Cereal	0.3%

Whole Grain Exemptions

Nearly one-third of the respondents have an exemption for serving all whole grain rich items for the 2017-18 school year. 72% of those with an exemption for the 2017-18 school year indicate the waiver is for a type of pasta/noodle. The second most common type of product exemption was biscuits, followed by pizza/pizza crust and tortillas/wraps.

Whole Grain Rich Item Exemption

Does your district currently have an exemption for serving all whole grain rich items for the 2017-18 school year?



Nearly 20% of responding districts indicated that they do not currently have an exemption, but would like to receive one. When asked which products they would like an exemption for, the most popular response was pasta/noodles (76%) followed by biscuits.

Similarly, 19% of respondents feel that there are barriers to applying for or receiving a waiver. This percentage increases to nearly 50% among those that are interested in receiving a waiver, but who don't currently have one.



Innovative Changes, Trends & Challenges

Innovative Changes

The survey invited respondents to share the most innovative change being made to their school nutrition program for the 2017-18 school year. A total of 392 individuals provided feedback. Many shared innovative changes relating to customization, new menu items and approaches to meet sodium and whole grain rich requirements. Other innovative changes that were shared by districts related to:

- Increasing the amount of scratch cooking,
- Increasing fruit and vegetable options,
- Expanding breakfast venues,
- Increasing grab & go options for lunch,
- Student engagement initiatives, and
- Expanding local purchasing or farm to school programs.

The full list of comments, segmented by district size, is provided in Appendix A.

Trends & Challenges

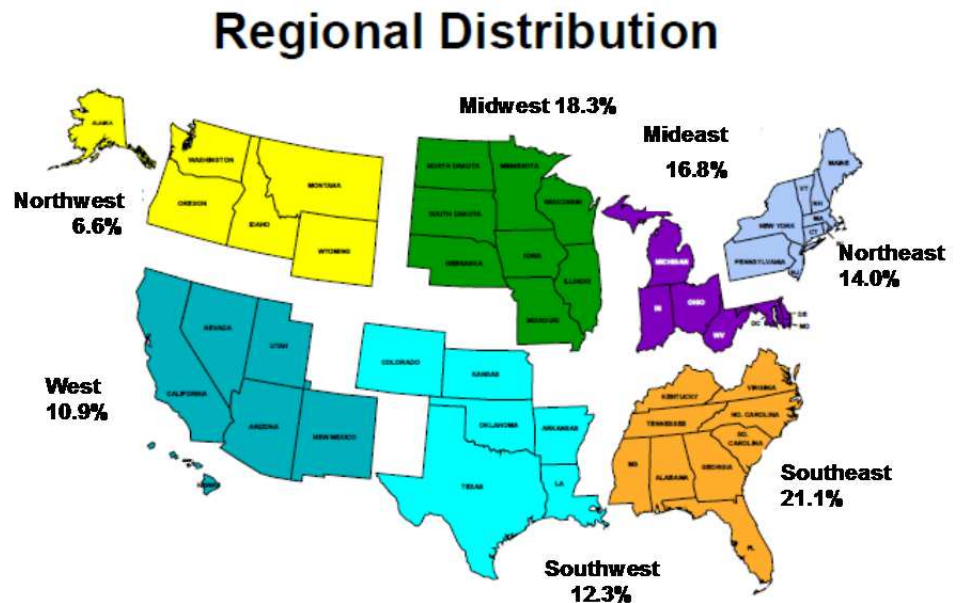
Respondents also had the opportunity to share additional trends, issues or challenges they are seeing in their school nutrition program. A total of 250 individuals provided feedback. Many of the challenges shared related to aspects of the meal pattern for lunch and breakfast. Other challenges included labor, paid meal equity requirements, serving more vegetarian and vegan meal options, Smart Snacks items and funding. The full list of comments, segmented by district size, is provided in Appendix A.

Respondent and District Profile

State/Region

The sample consists of 515 unique districts located in 46 states and Puerto Rico. California, Ohio, Michigan and Texas are the best represented states, collectively accounting for 22% of the total sample.

Segmenting the data by SNA region shows good representation from all regions, with the highest concentration of respondents found in the Southeast region.

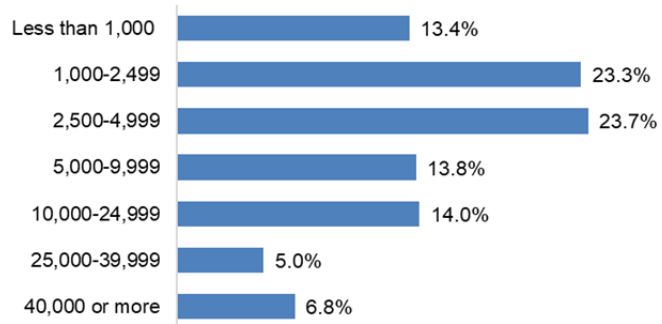


Enrollment

Districts of all sizes are represented in the sample, with most districts reporting a student enrollment between 1,000 and 4,999. The typical district has 7 schools.

The median number of schools varies in proportion with enrollment levels, rising from 3 schools among districts with less than 2,500 students, to 62.5 schools among districts with greater than 25,000 students.

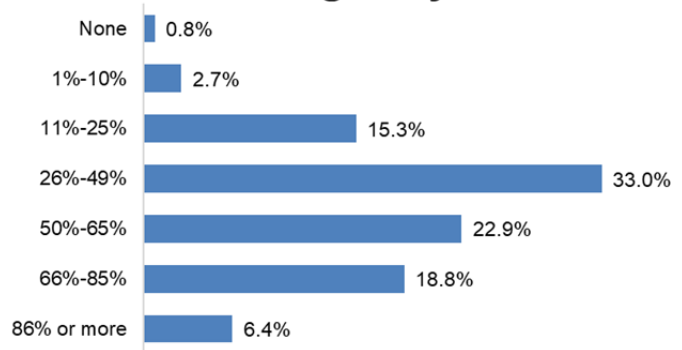
School District Enrollment



Free/Reduced-Price Eligibility

The respondents represent a diverse mix of districts with regard to the percentage of students who qualify for free or reduced-price meals. The most common situation is to have between 26% and 49% of students qualify, a situation cited by 33% of the respondents.

Free/Reduced-Price Meal Eligibility



Experience

The typical respondent has 14 years of experience in the school foodservice profession (range of less than 1 year to 40 years).



School Nutrition Association

The School Nutrition Association (SNA) is a national, nonprofit professional organization representing more than 57,000 members who provide high-quality, low-cost meals to students across the country. Recognized as the authority on school nutrition, SNA has been advancing the availability, quality and acceptance of school nutrition programs as an integral part of education since 1946.

Acknowledgements

As with nearly all research studies, the *2017 School Nutrition Trends Report* could only be produced with the combined expertise and suggestions of many people. SNA gratefully acknowledges the contributions and assistance given by its members to make it possible to produce this study. Special thanks to those members who took the time to complete the survey. SNA would not be able to stay on top of what is happening in the school nutrition industry without your assistance.

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