

Feeling good
on the move



Tomatoes, trends towards 2020
April 14th 2016



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Tomato

IL NOSTRO CAFFÈ PREPARATO CON LA CUCCUMA

La nostra miscela è 100% Arabica
e composta da 3 origini diverse testate singolarmente.

Prima della moka
e prima dell'espresso,
la cuccumella
ha dato inizio alla storia
italiana del caffè.
Nella cuccuma il caffè
scende, come nell'espresso,
e non sale.



1. Riempì il rubinetto caffè
2. Avvita il filtro
3. Inserisci questi due filtri nel rubinetto dell'acqua
4. Metti l'altra parte a una volta che bolle l'acqua, rivolti la cuccumella
5. Versa il rubinetto e gustati il tuo caffè!

1. Autogrill

La CAFFETERIA

CAFFÈ NAPOLETANO ALLA CUCCUMA	€0.80
CAPPUCCINO	€1.20
BICCHERE LATTE	€1.10
MACCHINO	€1.00
ORZO PICCOLO	€1.10
ORZO GRANDE	€1.20
GINSENG GRANDE	€1.30
GINSENG PICCOLO	€1.40
CAPPUCCINO ORZO	€1.50
CAPPUCCINO GINSENG	€1.50
LATTE MACCHIATO	€1.30
CAFFÈ AMERICANO	€1.50
TE' TISANA	€2.50
AGGIUNTA DI PANNA MONTATA	€0.50

ANCHE TAKE AWAY

The world's leading provider of food & beverage services for travellers

30 Countries

over **1.000** Locations

More than **4.500** Stores



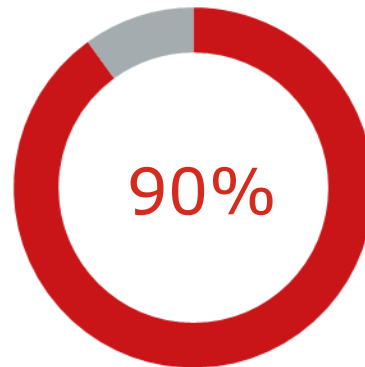
Airports



Motorways



Railway stations



of business carried out through concessions

The world's leading provider of food & beverage services for travellers



55.000
Employees
(61% of whom are women)



250
Brands

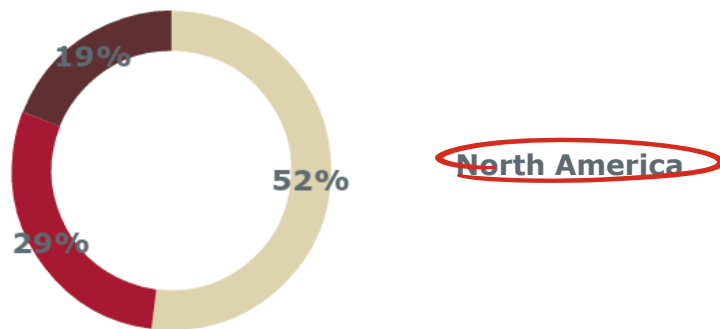


900m
Customers per year

Leader with a global footprint

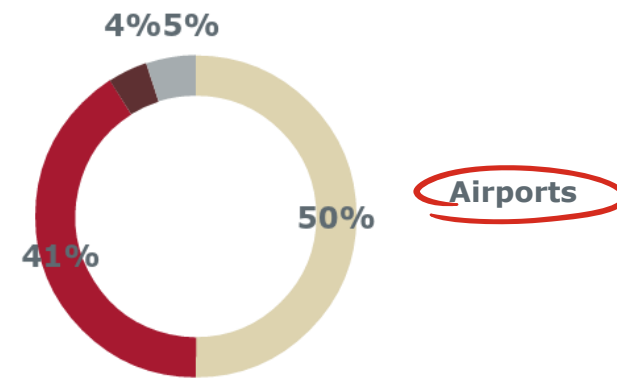


Net sales by region



- North America & Pacific
- Italy
- Other European Countries

Net sales by channel



- Airports
- Motorways
- Others

A global restaurant

AUSTRALIA AUSTRIA BELGIUM CANADA DENMARK GIBI FINLAND
 FRANCE GERMANY GREECE INDIA INDONESIA IRELAND ITALY
 JAPAN NEW ZEALAND THE NETHERLANDS POLAND
 PORTUGAL SLOVENIA SLOVAKIA SWEDEN SWITZERLAND
 SINGAPORE SPAIN SWITZERLAND USA RUSSIA VIETNAM
 AUSTRALIA AUSTRIA BELGIUM CANADA
 DENMARK EGIPT GERMANY GREECE INDIA
 INDONESIA IRELAND ITALY MALAYSIA NEW ZEALAND
 THE NETHERLANDS POLAND UNITED KINGDOM CZECK
 REPUBLIC SINGAPORE SWEDEN SLOVENIA SPAIN SWITZERLAND
 USA RUSSIA VIETNAM AUSTRALIA AUSTRIA BELGIUM CANADA
 DENMARK EGIPT GERMANY GREECE INDIA
 INDONESIA IRELAND ITALY MALAYSIA NEW ZEALAND
 THE NETHERLANDS POLAND UNITED KINGDOM CZECK
 REPUBLIC SINGAPORE SWEDEN SLOVENIA SPAIN SWITZERLAND USA

NORTH AMERICA

81 airports
 99 service areas
 8 shopping
 malls

EMEA

40 airports
 660 service areas
 56 railway station
 88 cities, fairs,
 museum and
 shopping

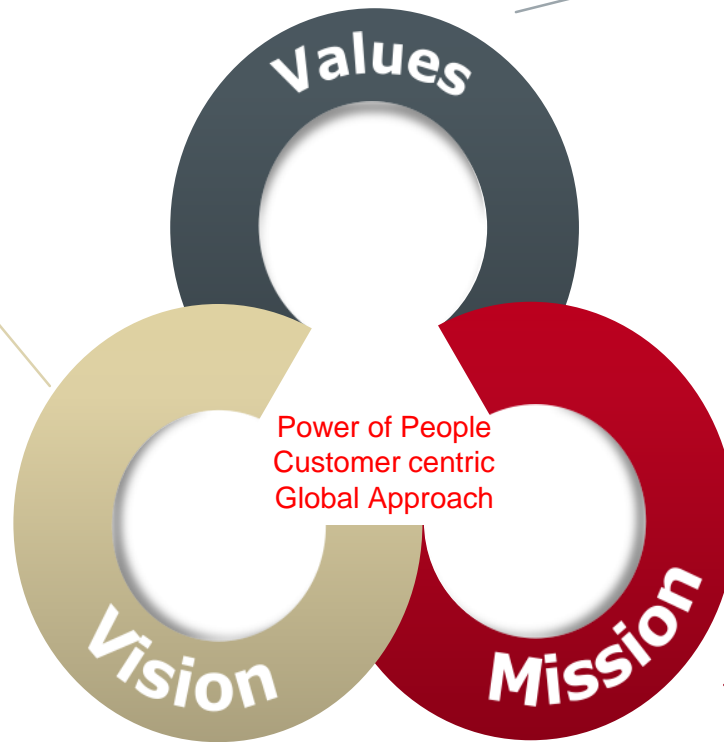
ASIA and PACIFIC

21 airports

malls

Company Mission, Vision and Values

To be the undisputed traveler's and trustworthy travel Food & Beverage company in the world



BE PASSIONATE
BE RELIABLE
BE OPEN
SET THE PACE
KEEP IT SIMPLE



Whether it's about eating, drinking or shopping, we want people on the move to reach their destination happier, safer, more satisfied thanks to our services. We make their time more effective and their journey more comfortable, adding value to their experience



2. New Guest Segmentation

the
HAPPY-GO-LUCKY
 [entertainment]

the
LIFE ENRICHER
 [inspiration]

the
URBAN DANDY
 [status]

the
SHARING ENTHUSIASTS
 [conviviality]

AFFILIATION

CONVIVIALITY

STATUS

INDIVIDUALISM

SENSIBILITY

ENTERTAINMENT

INSPIRATION

PEACE OF MIND

EFFICIENCY

THE
NEW NORMAL
 [peace of mind]

SENSE

THE
NAIL BITERS
 [efficiency]



Tribes description

the
LIFE ENRICHER
[inspiration]



They do not choose a brand, they choose places offering an experience/a self gratification



the
URBAN DANDY
[status]



They choose premium brands, endorsed by renowned and elitist sources



THE
RAIL BITERS
[efficiency]



They tend to be loyal to brands that make things smooth and efficient → it's a rational loyalty



Tribes description

THE NEW NORMAL
[peace of mind]



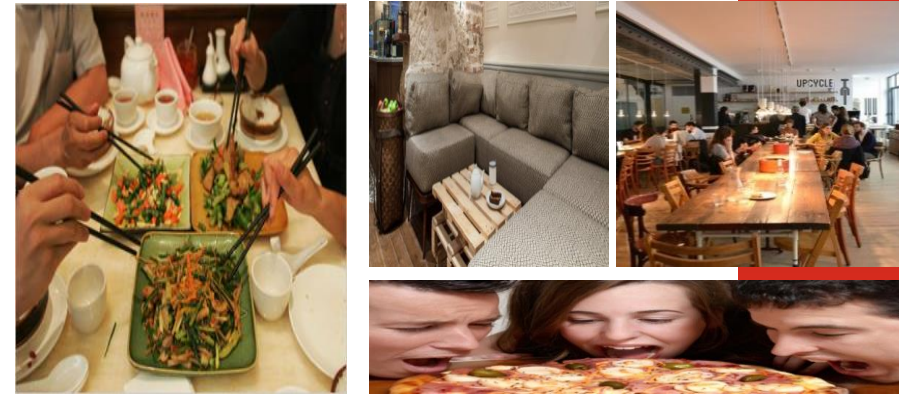
They are loyal to brands they trust → it's an "intellectual" loyalty



SHARING ENTHUSIASTS
[conviviality]



They do not choose a brand, they choose the atmosphere, the welcoming mood



the HAPPY-GO-LUCKY
[entertainment]



They choose young, informal and dynamic brands → a grant for easiness and fun





Stump of the World



German Johnson



Rosella Purple



Dwarf Wild Fred



3. Foodservice



Lemon Drop



Golden Queen



Sweet Sue



Summertime Gold



Blazing Beauty



Yellow Orbeast



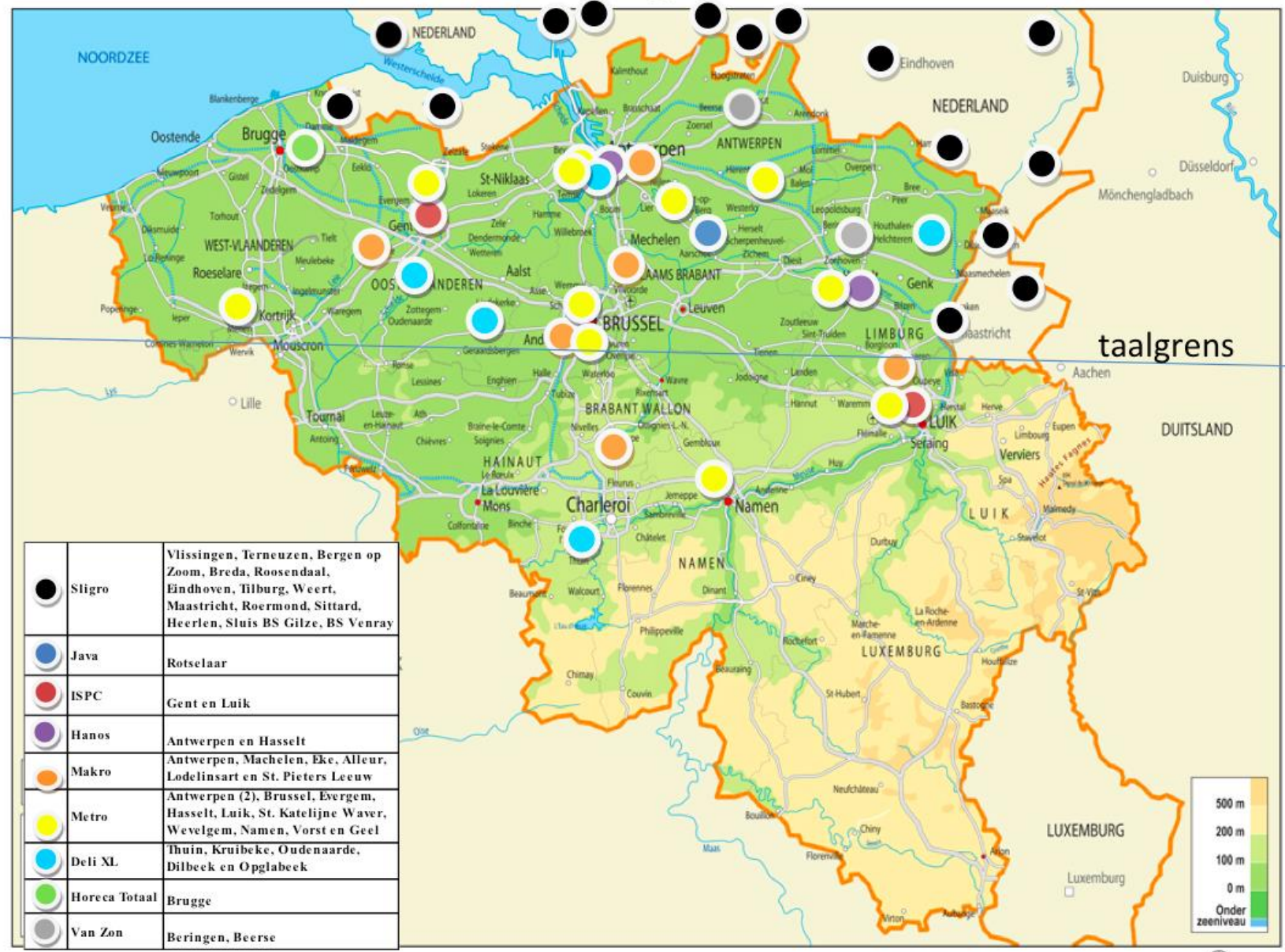
Yellow Brandywine



Kellogg's Breakfast



België



	Sligro	Vlissingen, Terneuzen, Bergen op Zoom, Breda, Roosendaal, Eindhoven, Tilburg, Weert, Maastricht, Roermond, Sittard, Heerlen, Sluis BS Gilze, BS Venray
	Java	Rotselaar
	ISPC	Gent en Luik
	Hanos	Antwerpen en Hasselt
	Makro	Antwerpen, Mechelen, Eke, Alleur, Lodelinsart en St. Pieters Leeuw
	Metro	Antwerpen (2), Brussel, Evergem, Hasselt, Luik, St. Katelijne Waver, Wevelgem, Namen, Vorst en Geel
	Deli XL	Thuin, Kruibeke, Oudenaarde, Dilbeek en Oplabek
	Horeca Totaal	Brugge
	Van Zon	Beringen, Beerse



FoodService BeNE 2015



16,8 miljoen
inwoners

11,1 miljoen
inwoners

€ 17,4 miljard
€ 6,3 - € 6,4 miljard

> consument <
> groothandel <



taalgrens

€ 14,7 miljard
€ 5,1 - € 5,7 miljard

taalgrens

	AANTAL INWONERS	AANTAL OUTLETS	INWONERS PER OUTLET
Duitsland	81,8 mio	141.526	578
Nederland	16,6 mio	30.362	546
Ierland	4,4 mio	9.481	470
België	11,0 mio	54.635	196

	OUTLETS	BELGIË Inwoners per outlet	NEDERLAND Inwoners per outlet
Hotels, pensions	4.055	2.715	2.424
Full service restaurants	13.487	816	1.321 !
Quickservice restaurants	15.631	704	1.631 !!
Cafés	20.779	530	674

	BELGIË Gem. Besteding/bezoek	NEDERLAND Gem. Besteding/bezoek
Hotels, pensions	€ 27,40	€ 34,23
Full service restaurants	€ 21,00	€ 20,38
Quickservice restaurants	€ 6,28	€ 5,26
Cafés	€ 9,22	€ 10,19

	BELGIË Gem. Besteding/Y	NEDERLAND Gem. Besteding/Y
Hotels, pensions	€ 63	€ 99
Full service restaurants	€ 499	€ 254
Quickservice restaurants	€ 294	€ 149
Cafés	€ 109	€ 162

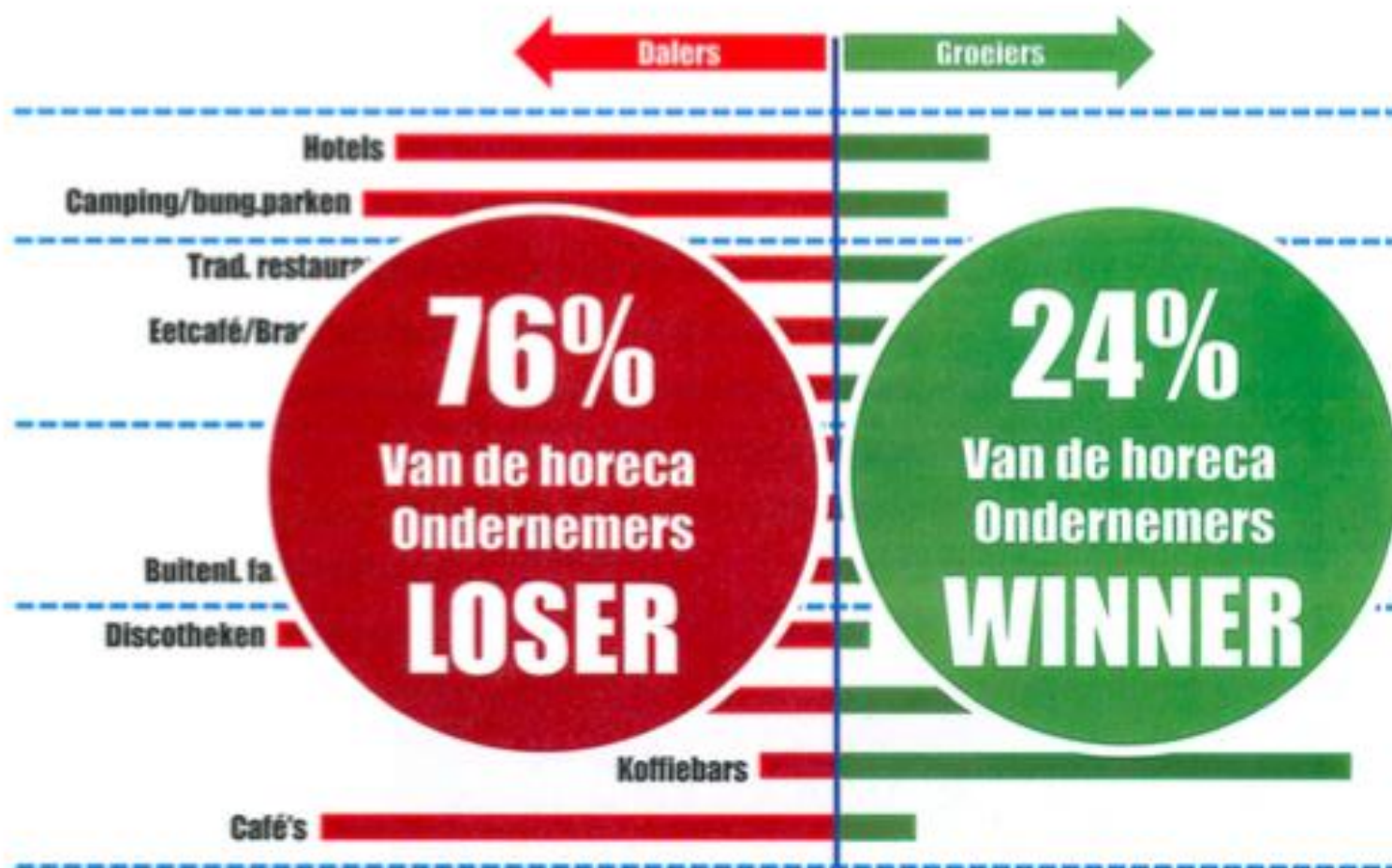


Vooraf te veel hotels en café's?

	BELGIË Gem. Besteding/bezoek	NEDERLAND Gem. Besteding/bezoek
Hotels, pensions	€ 27,40	€ 34,23
Full service restaurants	€ 21,00	€ 20,38
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Cafés	€ 9,22	€ 10,19

**Belgen besteden niet méér aan eten en drinken
buitenshuis, maar gaan wel vaker!**








4. Food Trends

1. The Sriracha effect


A close-up photograph of a small, dark-colored ceramic bowl filled with a vibrant red Sriracha sauce. The bowl is placed on a piece of light-colored burlap fabric. Surrounding the bowl are several fresh chili peppers, including bright red and green ones. In the background, a small metal tray contains a mix of black and white peppercorns. The scene is set on a dark wooden surface, creating a rustic and appetizing atmosphere.

Having learned that Sriracha sauce can add instant ethnic cachet to something as straightforward as a sandwich, chefs are scouting the world for other assertive flavorings.

North African flavors may be next

- ✓ Harissa
- ✓ Sumac
- ✓ Dukka

Gochujang: the latest from Korea



Spicy, salty paste is being used in both Korean and non-Korean recipes

2. Elevating peasant fare



Meatballs and sausages are proliferating, as are multi-ethnic dumplings, from pierogi to bao buns. Even the staff of life gets the royal treatment, from haute toast to signature cheesy bread.

Sausages



★ POSAMUNDIE
SAUSAGE GRILL



Image Source: www.posamundiesausagegrill.com/

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2016 TREND

3. Trash to treasure



'Head to tail' beyond center of the plate

Shake Shack's WastEd Juice Pulp Cheeseburger is made entirely from leftovers



By the numbers

50% of all food is wasted worldwide

Pre-consumer kitchen waste constitutes an estimated **4%–10%** of purchased food



37% of consumers say they would pay more for seafood described as 'sustainable'

2016 TREND

4. Burned



Charred vegetables



5. Bubbly



Effervescence make light work of the trendiest beverages.

'Hard' soda: adults only



6. Negative on GMOs



A chance for competitive differentiation



By the numbers

70% of consumers say they would be more likely to purchase foods or beverages described as **GMO-free**

34% would be willing to pay more for **GMO-free menu items**

29% believe **GMO-free items are tastier**

7. Modernizing the supply chain

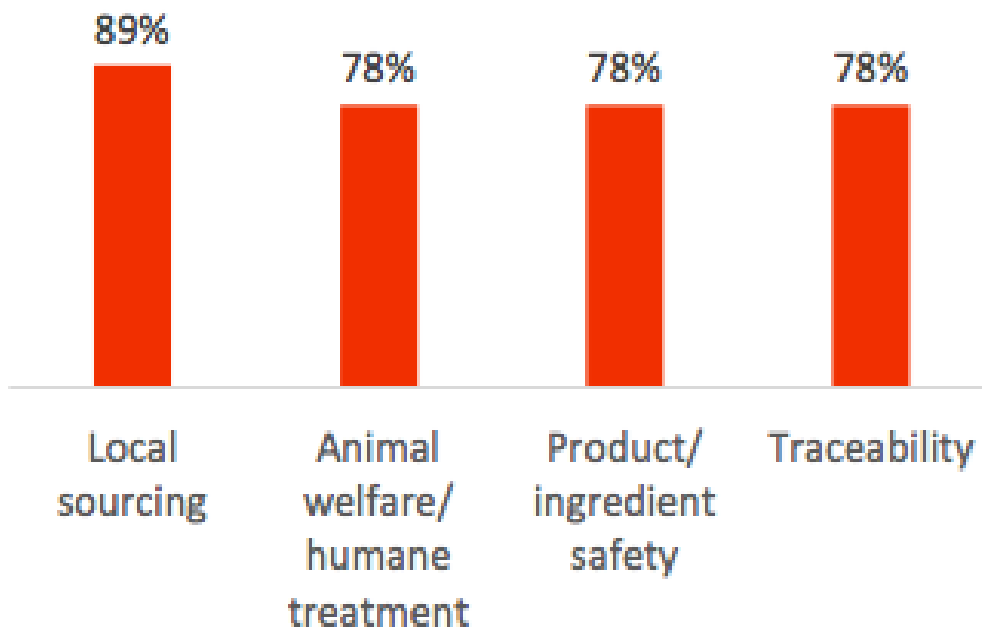


Climate destabilization, mutating pathogens and rising transportation costs, among other challenges, will lead to increasingly frequent stresses on the food supply chain. Diner demand for “fresh” and “local” fare also challenges a distribution system based on consolidation, centralization, large drop sizes and long shelf life.

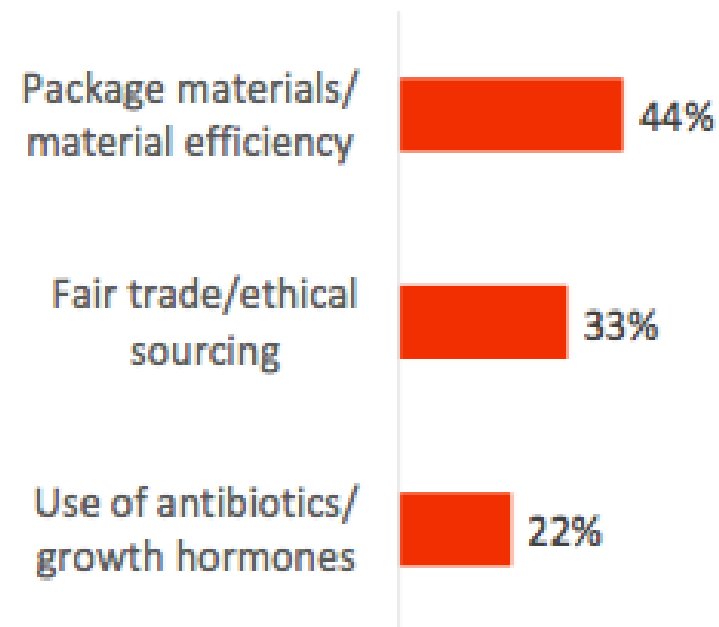
Distributors are juggling many challenges

Our company has initiatives related to . . .

Top 4



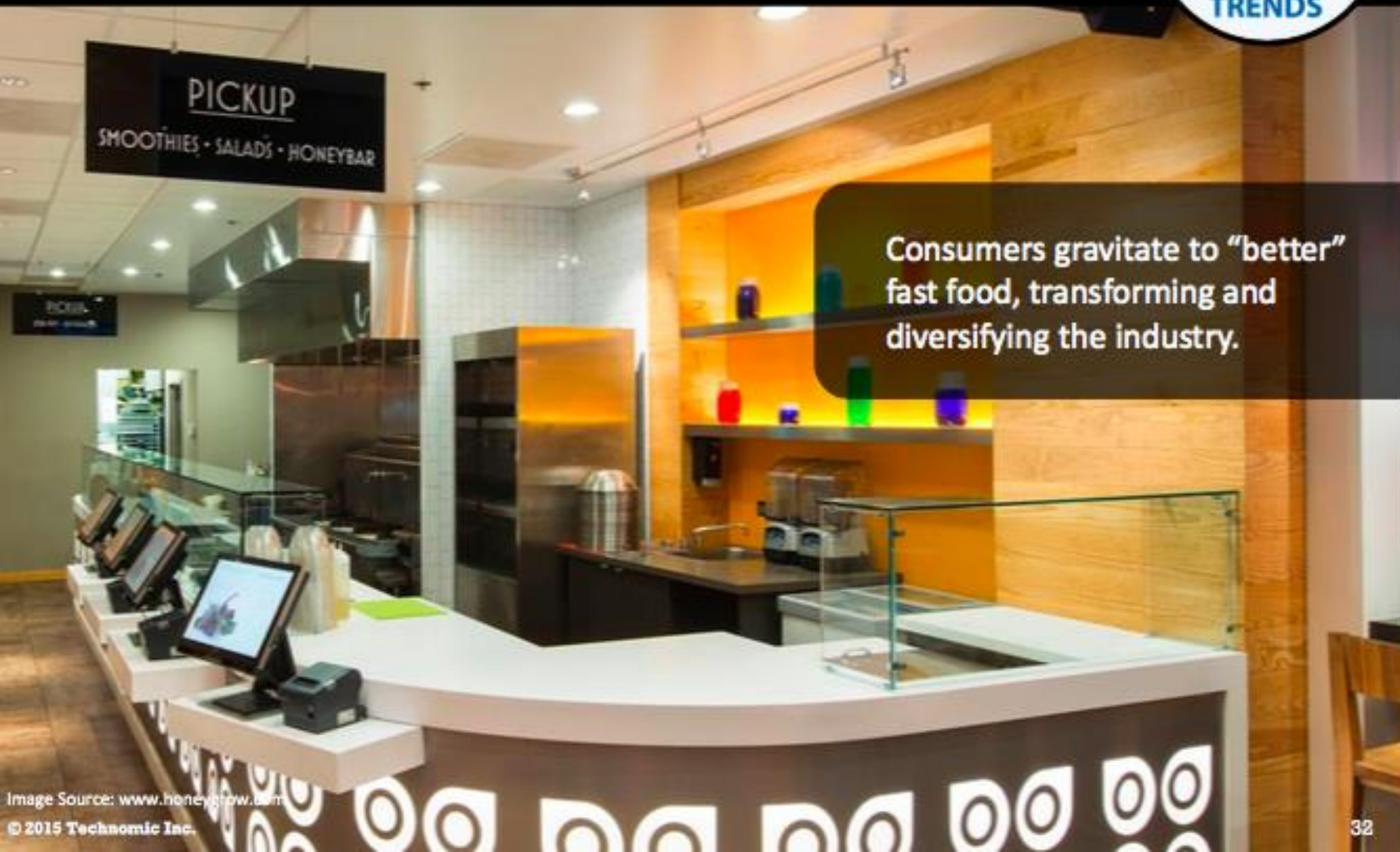
[Other initiatives]



8. Fast food refresh



Consumers gravitate to “better” fast food, transforming and diversifying the industry.



Daypart expansion can be key



STARBUCKS *Evenings*



9. The delivery revolution

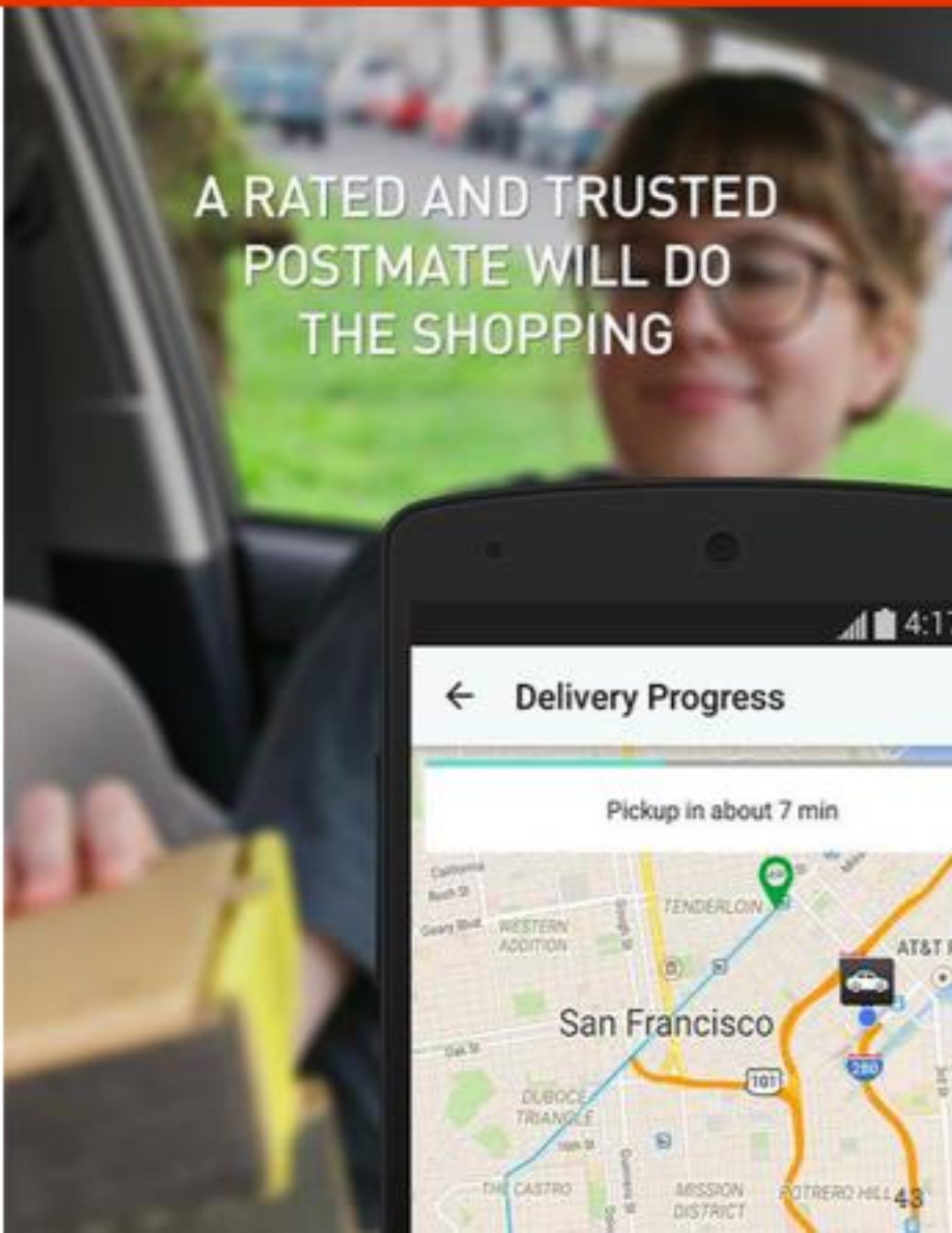


On-demand delivery



POSTMATES

A RATED AND TRUSTED
POSTMATE WILL DO
THE SHOPPING



Transformational companies muscle in



UBER  EATS



From commissaries, not restaurants



01 Every Order, We Donate a Meal
When you order, we provide a meal for someone in need.

02 Food by the Best Local Chefs
A vast variety of restaurant-quality prepared meals, handmade fresh each day using the finest, natural ingredients.

03 Amazing Fresh Beverages
We can't reinvent the weeknight dinner without something to wash it down.

04 Eco-Friendly Everything
We're greening our footprint in every way, even down to our 100% recycled fiber bag.

05 Innovative Sustainable Packaging
Our trays are made from all natural and renewable plant fibers (bamboo & sugarcane). They're compostable and biodegradable as well as oven and microwave safe.

5. TriBE vs Trend vs Tomato

- **TRIBE: Sharing enthusiasts:** > variety to meet everyones needs >>
 - **TREND** Customized, individualized food and drinks
 - Vegetarism
 - **TOMATO:** Spectacular shapes and colors
 - **TRIBE New Normal:** > simplicity. healthy and genuine food/fresh/local >
 - **TREND** Health & food = medicine, more fresh Less waste / less obesitas / less sugar! Farm to Table/Farm to Fork/ Pasture to Plate/Paddock to Plate Heritage of meat & fish Specialty farmers (new rockstar) Foodies & fatties: ingredients & calories by law Alcohol age to 21
 - **TOMATO:** local, fresh authentic, tasteful, shapes and color are important
 - **TRIBE Happy Go Lucky** > Fun, energy, unexpected >
 - **TREND** big varied offer in food, fun + sharing ,
 - **TOMATO:** crazy unusual tomato
- **TRIBE: Nail biters:** > convenience/pragmatism >
 - **TREND** Cultivation instead of wild
 - Data oriented
 - **TOMATO:** lower price, 'longer expiration date' simple red and round
- **TRIBE: Urban dandy:** >prestige luxury/haut cuisine >
 - **TREND** Chefs cooking recipes of guest in stead of own creations
 - **TOMATO:** very good taste and shape, deluxe packaging,
- **TRIBE; Life enricher:** > gourmet/connaisseur >
 - **TREND** COMBI OF Sharing Enthusiast, New Normal and Urban Dandy
 - **TOMATO:** local luxury

TriBE vs Trend vs Tomato

- Tips for product development and production:
 - > Focus on tribes and trends and develop per tribe
 - > Story telling almost as important as the product
 - but the story has to be authentic and true
 - > it is unlikely that one product will service all tribes
 - > consumer testimonials more important as ever before> social media will do your marketing, consumers trust each other more than producers



Thank you for your attention

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