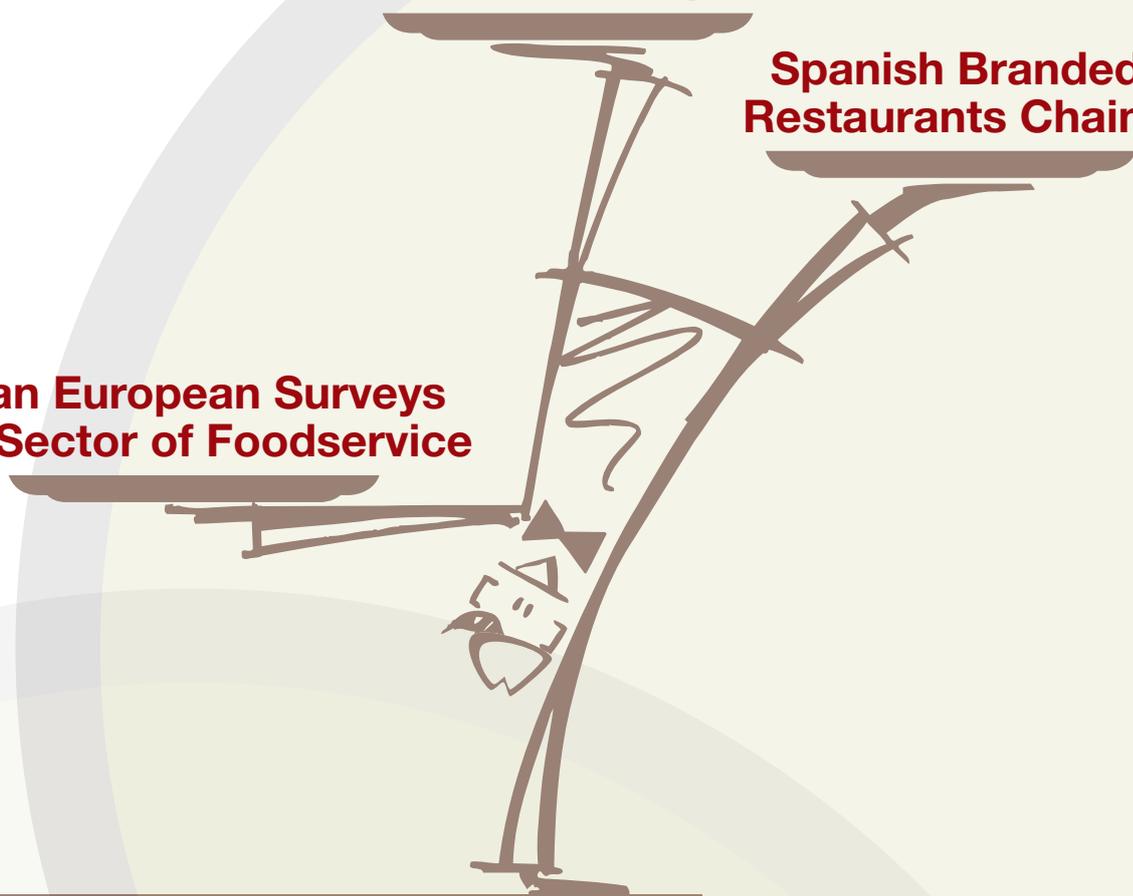


# Rankings of European Foodservice Companies

## Spanish Branded Restaurants Chains

## Pan European Surveys by Sector of Foodservice



*Recent History of the*  
**FOOD SERVICE  
MARKET IN  
EUROPE**

*Key facts, figures and  
leading companies*

Part I: 1999-2010

*A Compilation of Articles  
and Opinions published in*



*A Magazine belonging to*

**dfv** Mediengruppe





# Presentación

Lourdes Verger

Responsable de Comunicación, Acciones y Colaboraciones



## La Restauración de Marca es, en esencia, comprender al consumidor

En 2019 un proyecto editorial me desveló la verdadera alma de la restauración de marca y me enamoré. Lo que comenzó como una investigación histórica se convirtió en una pasión que posteriormente sería clave en mi trayectoria profesional. El reto era narrar cómo nació y evolucionó el sector, desde aquel primer establecimiento en los años 70 hasta sumar, hoy en día, más de quince mil locales repartidos por todo nuestro país.

Esta investigación que abordé con mi lupa antropológica me permitió comprender cómo la restauración de marca, también llamada organizada o moderna, ha transformado los hábitos sociales y gastronómicos. Su éxito no se debe solo al crecimiento en números, sino a su capacidad de conectar, de comprender a las personas y de integrarse en su vida cotidiana. Diría que los restaurantes son laboratorios sociales donde las tendencias llegan, se tastan, se adaptan y se consolidan. No es sólo comida, son nuevas formas de socializar, de alimentarse, de comunicarse, de identificarse... Porque no se elige un plato, se elige una narrativa. Las marcas que prosperan son las que consiguen dominar la personalización a escala en la era del yoísmo, sentirse único en un sistema de miles. Hablamos de algo profundamente humano.

Cuando visito restaurantes es como si explorara culturas y rituales modernos, observas sobre economía, psicología, lingüística, valores y comportamientos como: carta o QR, compartir foto en redes o el porqué de la elección del Take away.

Como sucede en la ciencia de la antropología, la restauración de marca es en esencia, el profundo conocimiento del comportamiento del consumidor. Y en ambos casos, analizar el pasado es fundamental para comprender y predecir reacciones del futuro. Si nos basamos en datos y en experiencias previas podríamos predecir comportamientos ante estímulos similares. Identificar patrones de conducta, conocer qué respuestas se dieron con éxito a los mismos retos que se dan ahora. El análisis retrospectivo potenciado con las nuevas tecnologías y los modelos de negocio nos ofrecerá óptimas soluciones.

Los insights derivados del análisis no pierden vigencia, solo cambian las formas y los escenarios, -como la publicidad de la prensa al tik tok- y por supuesto, los nombres que les damos, eso sí cambia, Virgen del camino seco. Pero las necesidades y los deseos subyacentes del ser humano permanecen. En la antropología se investiga para comprender y ofrecer soluciones. En nuestra industria para tomar decisiones estratégicas sobre el mercado. Pero en ambos casos el pasado informa al futuro y su comprensión es la clave para la predicción.

Para más Inri, el consumidor actual reclama ser investigado a fondo y comprendido. Porque es exigente, sabe lo que quiere y cómo lo quiere y eso, obliga a las marcas a observar, escuchar, y conocer continuamente a su público objetivo, además de una adaptación constante. Un proceso de ensayo y error el falla pronto falla barato. La construcción de propuestas auténticas, en muchas de las ocasiones sobre la calidad excepcional del producto principal. Es sobre todo, crear una experiencia de cliente distintiva que vaya más allá del plato o del scroll en la pantalla. Implica ofrecer propuestas adaptadas a la fragmentación de consumo por conveniencia y siempre con un valor percibido atractivo. El consumidor es multicanal, omnicanal, impaciente y con necesidad de controlar lo que elige por razones diversas. Es práctico, infiel por naturaleza pero fiel a la experiencia si la marca se lo gana continuamente.

Y para seguir en esta carrera competitiva en constante transformación siendo rentable, tan indispensable es, revisar por el retrovisor las tendencias emergentes internacionales que se van acercando y tener la habilidad para adaptarlo al gusto local, como conocer el camino ya recorrido por el sector.

El pasado nunca es un lastre, hay que conocerlo, reconciliarse con él y así descubriremos su poder transformador. Por ello, esta recopilación de Mario Cañizal es un tesoro lleno de conocimiento y experiencia. Es una brújula para navegar en aguas futuras. Un atlas que cartografía el alma y la evolución de nuestro sector. La reseña de hechos que nos llevan al statu quo actual y que puede ayudar a vislumbrar lo que vendrá, localizando patrones para innovar de forma significativa y con mayores probabilidades de éxito.

En este primer bloque se explora cómo la restauración organizada evoluciona del tradicional modelo Quick Service Restaurants (QSR) hacia el dinámico y creciente segmento Fast Casual. Así, tendencias como el Tex-Mex o la comida asiática, se adaptan a formatos que combinan rapidez, calidad y experiencia. Revisa la situación de categorías emblemáticas como los Steakhouses y Seafood Restaurants, que han sabido reinventarse y cómo arraigó lo orgánico y Plant-Based, hasta la llegada del segmento Travel Channel.

Un aspecto especialmente interesante es cómo la globalización y su mezcla cultural también transformó la restauración organizada, demostrando que la búsqueda de la autenticidad, el dominio del producto o la calidad, son paradigmas universales. Casos como la marca danesa Sticks' n' Sushi con sushi, la alemana Vapiano con comida italiana o la suiza Hiltl en plant-based llegan a ser referentes en toda Europa. Esta autenticidad y calidad se asemejan al actual Farm-to-table, que se enfatiza la trazabilidad y la procedencia de los ingredientes.

Cuando el sueldo aprieta aparecen los caprichos asequibles pero con un consumo sofisticado como con los cafés y las masas madres. Calidad y ritual en lo cotidiano. Cuando parecía que la pizza no podía reinventarse aparecen los hornos napolitanos a la vista o sin gluten. Tras el comer bien llega el hacerlo de forma responsable y explícita. La estética salta del emplatado a las paredes y baños. De turnos partidos pasamos a la dinamitar momentos, porque no consumo igual dependiendo del día, de la hora o de con quién esté. ¿Que la comida de servicio rápido era homogénea? Pues ahí llegaron los tacos, los pokes y las milanesas y es que, esto es una rueda que nunca para de girar, pero siempre pasa por los mismos puntos: sorprender, adaptarse y volver a empezar. Eso sí, con un memorable packaging para poderlo compartir con mi tribu, o mejor dicho, comunidad.

Como profesional de este sector, disfrutarás recorriendo estas páginas.



# Introducción



## Introducción

En otoño de 2022, la importante editorial alemana de prensa profesional dfv Mediengruppe, con más de 100 publicaciones editadas para 17 sectores económicos, decidió dejar de editar la revista FoodService Europe & Middle East, FSE&ME, redactada en lengua inglesa, con el fin de que su lectura llegase al mayor número de profesionales, en todo el mundo.

Los motivos no vienen al caso, ya que en los tiempos que vivimos, se pueden imaginar o suponer.

Hasta ese momento FSE&ME, era el principal referente informativo a nivel internacional, para directivos y cuadros profesionales del sector foodservice que, en cualquier país de Europa, quisiera saber lo que sucedía allende sus fronteras.

FoodService Europe, FSE, que así se llamó la revista en un principio, había nacido a finales de 1998, como consecuencia de la inquietud, tesón y visión profesional de dos periodistas de la dfv, Gretel Weiss y Marianne Wachholz, que trabajaban en Food Service (1982), revista que editada en lengua alemana, circulaba principalmente por la zona DAF en Europa.

Ambas terminarían por ser las editoras de la nueva publicación.

Mi primer contacto con Gretel Weiss fue en 1999, por mediación de Daniel Majonchi, creador y CEO de la cadena francesa de restaurantes Chantegrill y alma mater del movimiento Leaders Club France primero y Leaders Club International después, al cual había conocido fruto de mi colaboración profesional, desde Caterdata, con la revista Neorestoration Magazine, que con Livre Service Actualités, creadas por el editor francés Jacques Pictet, eran de lo más leído en los años setenta por quienes nos interesaba saber qué sucedía en Europa, tanto en restaurantes como en el canal super-híper.

A Weiss no había que contarle porqué Barcelona, en los años noventa, formaba parte de las capitales europeas que lideraban el cambio de paradigma en la restauración del viejo continente. Pero quería que el grupo de restauradores que le estaban apoyando a crear FSE conocieran, en vivo y en directo, el porqué de la notoriedad del diseño del Tragaluz de Rosa Esteva, la cocina abierta de El Trovador

de José Cacheiro, los rompedores conceptos de Francesc Nolla ( Il Café Di Francesco) o su hermano Artemi (Tapa Tapa) por no hablar de Bopan o Pans&Co en materia de hacer del bocadillo, plato principal, fuera del hogar.

Así que viajó con ellos a la ciudad condal, teniendo la oportunidad de diseñarles un study tour (ya ocupaba la gerencia de la hoy Marcas de Restauración) cuyo resultado hizo que no sólo repitiera con otras empresas, sino que corrió la voz por Europa, provocando que llegaran también misiones de Suiza, Italia, o Francia, con más restauradores, deseosos, también, de conocer lo que serían iconos de la restauración moderna a nivel internacional.

Iconos que contribuyeron a ser aprovechados por más iniciativas empresariales que como no, se constituían en un filón informativo para FSE que empezó a publicar reportajes sobre el foodservice en España y a invitar a los eventos que organizaría a directivos de empresas como Paradis, Telepizza, Vips, Jamaica Coffee Shop... y así casi cada año.

Con el fin de lograr la necesaria continuidad en publicar actualidad, Weiss pidió que mi despacho profesional se encargara de realizar aquellos reportajes que encajaran en la planificación de la revista, primero semestral, después trimestral y finalmente bimestral, encargando a Katrin Schendekehl la necesaria *Liaison* entre Frankfurt y Barcelona. Labor que duraría desde 1999 hasta 2022.

Trabajar con Katrin no solo fue un placer profesional, sino que me enseñó sobre el rigor, seriedad y exigencia informativa, en cuanto a calidad y actualidad de la información, con la que se trabajaba en el seno del proyecto de Gretel y Marianne; lo cual me ayudó mucho a descubrir -y resolver- las carencias que poseíamos en España sobre tales requisitos, pues acá valía todo y la cuestión era aportar -en ocasiones- cifras y noticias que, aún sin fundamento intentaran validar una hegemonía y liderazgo que no era tal. Con el tiempo se fue mejorando ese escenario.

Aunque soy muy consciente que el equipo profesional que en la dfv se encarga actualmente (Gretel y Marianne, como yo, se han jubilado) del



## Introducción

tratamiento informativo del foodservice en Europa, está diseñando un plan estratégico, contando ahora con las RRSS y la IA, para lograr, de nuevo, liderar la información profesional del sector, me he atrevido a repasar la historia de la revista desde su número dos (el número 1 se publicó en 4T de 1998, incunabla que no llegué a leer) hasta el último editado, con el fin de seleccionar aquellos trabajos que merecería la pena rescatar de la edición en papel (la dvf pone al servicio del interesado un archivo bibliográfico/digital\* de indudable valor) y publicarlos en un modo de e-book.

Y los motivos que me han llevado a ello son múltiples. Primero, crear un “catecismo” sobre el foodservice que me ayude a recordar y en encontrar respuestas sobre el origen de su creación, jerga y protagonistas... En segundo lugar, poner a disposición de investigadores y pedagogos en materia de restauración de marca, materiales y fuentes de información, que les permita conocer las tribulaciones de los grupos de restauración más representativos de la etapa cronológica elegida, donde FSE fue como la notaría donde se registró su aparición, crecimiento, consolidación... u ocaso. Y finalmente inventariar mi aportación, pues ahora que veo el resultado es posible que nadie haya escrito tanto sobre el foodservice en España, para revistas como FSE, pero también para Neorestoration Magazine y otra prensa profesional internacional, como un servidor.

Les introduzco, a continuación, en un primer bloque de materiales informativos editados por FSE&ME entre 1999 y 2010, para en un segundo e-book realizar la misma tarea para la etapa 2011-2022, si acaso, más interesante y voluminosa,

En el resumen ejecutivo, conocerán como he estructurado la información seleccionada, con el fin de que logre manejarse con agilidad, respondiendo al interés de quien elija uno u otro trabajo y esperando no haberme olvidado de algún tema, acontecimiento, empresa o profesional que también debiera haber incluido.

Ha sido una tarea entre faraónica y de “rata de biblioteca”; pero muy gratificante, puesto que cada hallazgo, convertido en selección, fue como desenterrar un tesoro en medio de un apasionante desierto de tinta y papel.

Un esfuerzo minucioso, casi quirúrgico, que exigió paciencia, dedicación y una obsesiva atención por no olvidar nada interesante.

Tarea y esfuerzo dedicado a lo que frecuentemente citaré como “la revista” y a reconocer la labor profesional de Gretel Weiss y Marianne Wachholz que reseñaré a menudo como “WyW”, así como a su equipo (en especial a Katrin Schendekehl) y al que tuve la ocasión de pertenecer como Contributing Author entre 1999 y 2022.

Mario Cañizal

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(\*) Para solicitar copia de reportajes dirigirse a: [zentralarchiv@dfv.de](mailto:zentralarchiv@dfv.de)

## Resumen ejecutivo

En esta primera parte, figura la selección de materiales informativos, editados en su inmensa mayoría\* por la revista FSE&ME que, el autor de la recopilación, entiende son prioritarios, para quien desea introducirse en el seno del foodservice a nivel internacional, preferentemente europeo, en la etapa 1999-2010 y básicamente en materia de restaurantes.

### **Habrá una segunda parte que cubrirá los años entre 2011 y 2022.**

Recopilación que se ha estructurado siguiendo dos criterios básicos. Uno, recogiendo los reportajes según pertenecieran a cada sección de la revista. El otro, siguiendo su orden cronológico de aparición, con el fin de entender su importancia en el momento justo, que la tiene.

Así pues, se inicia el e-book con los Pan-European Survey. Reportajes sobre un sector determinado del foodservice, en determinados países europeos, elegidos para formar parte del artículo. En este caso, se han omitido aquellos en los que el sector no era importante en España (p. ej. restaurantes cercanos a ríos) o países cuya oferta gastronómica no suponía relevancia para el lector, en aras de adelgazar el volumen de páginas que supone esta parte del e-book.

Curioso que no se tratan a los burger con la importancia que deberían tener, en esta primera etapa y se prima con reiterados reportajes a la pizza.

En algunos casos, se complementa el Survey con entrevistas de directivos de empresas de referencia en el sector analizado, A destacar el caso de los “bread based” en la que figura una realizada a Ignasi Ferrer.

A continuación, figuran sendos bloques informativos sobre Rankings de empresas. El primero sobre clasificación de grupos de restauración según ventas-exclusivamente-en Europa y el segundo sobre coffee-shops, según número de locales, dada la predilección de las editoras por este segmento del foodservice ante los sustanciales cambios que ha atravesado, en la etapa analizada y también en la siguiente.

El primer ranking terminará por ser una parte sustantiva de las ediciones de la Summit, que se ha venido celebrando en Zurich cada año, entre 2000 y 2023, siendo presentados los resultados por la propia Gretel Weiss. Y en cuanto al segundo, tal ha sido su consideración que se creará una especie de cluster denominado Café Future, que actuará como convocatoria itinerante (aunque la de mayor importancia tendrá lugar en las ediciones de la feria Internorga en Hamburgo) en la que reunir a todos los protagonistas de la supply chain del café, incluidas las

cadena de coffee-shops o los grupos de restauración, con una división y marca ad-hoc, en su seno.

En este orden de consideraciones, cabe destacar la importancia que va a representar la presencia de marcas españolas en el ranking de coffee-shops y el reconocimiento de Barcelona, junto a Londres, como ciudad con mayor innovación en ese mundo, logrando que España supere a Alemania, algunos años, en el número de marcas que aparecen en la clasificación anual de, primero los TOP55 y después en los TOP60.

Tras presentar información cualitativa (Surveys) y cuantitativa (Rankings) aparecen en un capítulo especial, los principales artículos y reportajes firmados por mí y otros profesionales, a raíz del interés de la redacción de la revista por poseer información actualizada de lo que iba sucediendo en el foodservice español en la etapa considerada.

En este mismo capítulo, se insertan una serie de fichas de restaurantes, venues y eventos que se fueron publicando en las secciones de la revista tituladas como Hot Trends y Concepts to Watch, en los principales países europeos.

No son todas las que aparecieron, pero sí las más representativas; algunas de las cuales atesoran cierto grado de nostalgia, como las referidas a Tapelia, Sandwichs&Friends o Fast Good, por representar hitos sustanciales, en materia de arrocerías, sandwichs y fast casual, en este último caso firmado por Ferrán Adriá, en la emergencia del sector de foodservice en España y que ya no operan en el mercado.

A continuación, figura una reseña por cada una de las Summit organizadas por la revista, en colaboración con el GDI suizo, que ofreció sus instalaciones en Zurich para las primeras convocatorias anuales y la Universidad Central de Florida. Fueron cabeza visibles respectivamente, Gretel Weiss, David Bosshart y Christopher Muller, los cuales se hicieron acompañar por un “think tank” de expertos, donde pronto brillaría, con luz propia Ignasi Ferrer, en calidad de CEO de Eat Out.

Este evento no se caracterizaría solo por el alto nivel de conferenciantes (abierto a intervenciones de directivos de empresas españolas) y asistentes, sino también por el intenso networking generado en los break entre sesiones y sobre todo por la velada que mediaba entre la primera y la segunda jornada: nada menos que a bordo de un bajel, navegando por el lago que limita con la ciudad de Zurich.

Gracias al Boat Party de cada edición anual, estamos seguros de que se han gestado

## Resumen ejecutivo

importantes transacciones y operaciones comerciales, además de estrechamiento de vínculos profesionales entre directivos, como por ejemplo los de Steve Winegar (representando primero a Zena y después a Restauravia) con Henry McGovern (creador del imperio Amrest), hoy partners en el conglomerado financiero empresarial McWin.

Sin gran contenido, que lo tendrá en la Parte II (2011-2022) se ha reservado espacio para la sección Market Analyses, al objeto de reproducir algunos de los importantes informes que publicará en la revista o presentará en eventos organizados por ella, la consultora NPD-Crest (hoy Circana) que con Technomic(EEUU) y el propio GDI, entre otros institutos de investigación de mercados, se encargarán de presenta estudios sobre pronósticos y prospectiva.

Cerrando el índice del e-book emergen dos capítulos más. El primero se titula Essentials&Fundamentals, que pretende ser no tanto un cajón de sastre, como un lugar reservado a documentos “no clasificables”, pero de elevado interés para los profesionales del foodservice.

Contiene pues, desde reportajes sobre cambios en los hábitos de consumo según generaciones ( X, Y...) hasta una anecdótica crónica, sobre la iniciativa de McDonald’s de entrar en el sector hotelero, con una instalación cerca del aeropuerto del Zurich que pude conocer bien al pernoctar en ella y darme cuenta de que, como todo en lo que se inmiscuye la compañía de los arcos, en innovación y servicio van por delante de cualquier otra empresa. Lástima que los números, seguramente, no salieron como deseaba y el experimento, quedó, en eso.

También es objeto de interés repasar la entrevista que se publicó con Rostislav Ordovsky-Tanaevsky Blanco, CEO de Rosinter Group un emprendedor con ADN latino, que supo construir un conglomerado empresarial en Rusia con fuerte

presencia en su mercado de foodservice y que ha sabido mantenerse activo, no sin dificultades, pese al conflicto de dicho país con Ucrania y que llevó a numerosas empresas de restauración, como McDonald’s a retirarse del mismo, como consecuencia del bloqueo económico, decidido por las principales potencias mundiales, como EEUU.

Pero lo más importante de esta sección son algunos de los editoriales de Weiss y Wachholz, aparecidos en los primeros números de la revista. Unos por sentar las bases y filosofía de lo que pretenderán con la planificación de contenidos, a los cuales dedicarán espacio para explicar su desarrollo conceptual y que, en ocasiones no cabe duda, pueden incorporarse como doctrina a los principios del food service. Y la otra, una breve noticia de la osadía, u oportunidad, de erigirse en cronistas del desarrollo del sector en los países de Oriente Medio. De ahí que, desde el 1T de 2004 la revista pasará a llamarse FoodService Europe&Middle East (FSE&ME) en vez de, simplemente, FSE.

Señalar que, la información generada fue en su momento tan rica y útil que fue una pena que no llegara a tiempo para que, los mercados analizados, fueran incluidos en los planes de expansión de algunos grupos españoles de restauración, puesto que, aún es la hora, en que sigue habiendo operaciones de referencia, como la que Eataly ha cerrado recientemente con Azadea, uno de grupos inversores de aquella zona mas receptivos de conceptos europeos de restauración moderna. La “petro-tarta” es tan grande que, aún, hay posibilidades para quien decida asomarse a tan dinámicos mercados.

Por último, que no al final, se halla la sección The Gallery, donde se publican desde fotos, a algunos reportajes y crónicas que pueden contribuir a dar más luz informativa, a los que aparecen en los diferentes capítulos reseñados.

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(\*) Con el fin de enriquecer el acervo estadístico sobre el sector en Europa, figuran en anexo algunas de las clasificaciones elaboradas por la revista francesa NeoRestauracion Magazine sobre restauración comercial, restauración rápida y restauración colectiva en Europa.

A stylized, dark brown line-art illustration of a rooster, facing left. The rooster is depicted in a dynamic, almost dancing pose, with its wings raised and its tail feathers fanned out. The word "ÍNDICE" is written in a bold, orange, sans-serif font to the left of the rooster's head.

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LOS AUTORES

# Pan European Surveys

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Los *pan-european surveys* son reportajes donde, eligiéndose un sector del foodservice por parte de la redacción de la revista, se encarga a cada *contributor-author* (así le llaman a los colaboradores) por país, remitir una crónica con la descripción de las principales empresas que lo lideran y sus datos internos más significativos.

No en todos los reportajes se cuenta con los mismos países, pese a que, en ocasiones, se ha tenido que contar con dos números de la revista para cubrir el sector, por la aparición de numerosos de ellos.

Y en esta selección, que aquí figura, se han omitido reportajes que para el lector español podrían no ser prioritarios (*influencers*, restaurantes cerca de los ríos, restaurantes en empresas de distribución, en cruceros de lujo etc etc) e incluso países que tampoco eran significativos, en un contexto más europeo-occidental.

¿Motivo principal? La macro-extensión que tendría el capítulo, ya de por sí numeroso en páginas, para la veintena de sectores seleccionados.

Destacar la riqueza de datos de las empresas citadas sobre gestión económica; algo inusual para el caso de los reportajes de la prensa profesional española y no debido precisamente a que sus informadores dejaran de aspirar a conseguirlos en las empresas objeto de sus valiosos reportajes.

En cuanto a los temas tratados, en esta primera década se repasan, previamente hecha una selección de lo publicado, las novedades que suponen añadir a la ortodoxia de un *quick service restaurant*, significado por la pizza, la pasta, el pollo o el sándwich, un naciente *fast casual* procedente de otro segmento consolidado tal como el de los casual restaurants, en ese momento atento a conceptos extra-europeos como los relativos al *tex-mex*, *al mex* o al *asian-food*, sin olvidarse de repasar la situación a nivel pan europeo de los *steakhouses* o *seafood restaurants* y la llegada de lo orgánico, partiendo de un plant based que aún no se conocía con ese término en aquellas fechas que, empezaban también a consagrar a un nuevo segmento: el *travel channel* compuesto por la oferta culinaria en estaciones de tren, aeropuertos y carreteras.

En algunos reportajes encontrarán como complemento, o bien editoriales firmados por G. Weiss y M. Wachholz (con el "acrónimo" de **WyW**) o bien entrevistas o artículos sobre directivos y temas relacionados estrechamente, con el contenido seleccionado.

Los reportajes pueden solicitarse a [www.dfv-archiv.de](http://www.dfv-archiv.de)

A continuación se relata una breve descripción como sujetos del contenido del capítulo. En primer lugar, se destaca la imparable penetración de la comida mex y tex-mex en las ciudades europeas y la situación de los restaurantes temáticos de *seafood*, así como un reconocimiento a los pioneros del uso de los plant based, relatando sobre los principales restaurantes vegetarianos en Europa, donde los Hiltl de Suiza serán un referente. Se anexa una entrevista con su creador fundador Rolf Hiltl.

Si de proteína animal se tratara, los *steakhouses* tendrán dos apariciones en la publicación: una en 2002 y otra en 2010 mientras que la influencia asiática se pondrá en evidencia en los artículos de 2005 y 2008 junto a una entrevista con Alan Yau fundador de Wagamama, además de los comentarios de WyW. Figuran también páginas dedicadas a la aparición de los restaurantes *fast casual*, como solución ecléctica ante los cambios de conducta de la clientela.

El segmento de mayor envergadura informativa será el de QSR, pese a una menor consideración sobre los burger y a favor, intensamente, de la comida italiana: tanto de la pizza que tendrá un editorial de WyW y hasta tres reportajes sobre pizzerías en 2002, 2006 y 2010 además de otro sobre la pasta de tenedor.

El pollo frito, los helados y los *juice bar* se sumarán a los reportajes anteriores, que se completarán con el tratamiento del fenómeno del bocadillo, en sus distantes vertientes europeas (bakery café y sándwich bar) con un reportaje en 2003 que irá acompañado de un editorial de WyW y una entrevista con un jovencísimo (32 años) Ignasi Ferrer, en calidad de CEO de Eat Out y del no menos novel, en foodservice, del líder de los panaderos norte-europeos: Alain Caumont fundador de Le Pain Quotidien.

Para terminar este capítulo se reseñan sendos artículos sobre la oferta gastronómica en estaciones de tren por dos veces (2002 y 2008), en aeropuertos (2007) y en las áreas de servicio de carreteras (2008), como expresión de la importancia que iba tomando la aparición del travel channel, o restauración en ruta.

De todos los reportajes seleccionados reproducimos para su lectura directa y a modo de ejemplo:

- El editorial de W y W titulado "A Perfect Blend" y
- El artículo sobre bakery café, "Affordable Treat in Tough Times".
- La entrevista con Alain Caumont, fundador de LPQ.

## Selección de PAN EUROPEAN SURVEYS, etapa 2000-2010

Fecha de Aparición	Título	Contenido
2000	High Energy Environment	Tex Mex
2001	The Ocean's Specialists	Seafood
2001	Meat-Free and Healthy	Vegetarianos
2002	Only a few USA Chains	Steakhouses
2002	Shopping Centres and Rail Stations (Spain)	Estaciones de tren
2002	Fast Food Pizza Still a Rarity	Pizzerías
2003	Shooting Star Sandwich	Sandwichs
2004	Pasta is Everywhere	Pasta
2004	Increasingly Brand Driven	Carreteras y Autopistas
2004	Scoop Shops on the Movie	Helados
2005	Fast Light And Exotic	Asian Food
2006	Fresh Fast and Attractive	Fast Casual
2006	Organics Gain Momentum	Orgánico
2006	Favourites Facing Stiff Competition	Pizza
2006	Between Tradition and New Challenges	Pizza
2007	On The Wings Of	Pollo
2007	Pre-Flight Entertainment and Food to Fly	Aeropuertos
2008	F&B on Trains: Driven by Logistics	Estaciones de Tren
2008	On The Crest of A Wave	Asian Food
2008	Modern Asia Meets Europe	Asian Food
2009	Trust Regained&Credible From Field To Plate	Steakhouse
2010	Niche Market Full Of Energy	Zumos
2010	Dominating The Eating Out Land Scape	Pizza
2010	Enduring Success in Difficult Times	Pizza
2010	Affordable Treat in Tough Times	Coffee & Bakery

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FRONTLINE

# A Perfect Blend



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**The segment is still in its infancy** in terms of outlets and market shares. Wagamama, without doubt the fastest growing pioneer in Great Britain, made its debut in Central London in 1992 and, with around 80 outlets internationally, 50 of them in Britain, still leads the pack by a good margin. However, Wagamama's offspring are sprouting up all over Europe: young Asian concepts, which are particularly popular among urban professionals. Consumers from Madrid to Moscow have at least one important thing in common: they expect quality, high quality. And their experience of the culinary world is above average – naturally, they are also well informed about international cuisine. However, although relatively affluent, they have little time to spare, especially during the day. The result is a demand profile that modern Asian formulas, many of them from the fast-casual segment and almost always oriented towards multiplication, have no trouble in catering for: with a perfect blend of ethnic cooking and a cosmopolitan, trendy atmosphere designed to meet the taste preferences of trend-conscious, design-oriented consumers. While the spectrum of concepts ranges from uncomplicated eateries to high-end fusion approaches featuring culinary influences from other regions of the world, too, the basic recipe remains more or less the same. Good, healthy, trendy food with an authentic background but adapted to Western palates – typically embedded in a stylish setting with absolutely no traces of folklore, which is exactly what modern target groups need to feel at home. We portray the trends, brands and major players across the continent in our pan-European survey on Young Asian Concepts (part 2), which begins on page 8.

**Asian cuisine is blossoming**, particularly in Russia or, more precisely, in Moscow. In fact, there are more chained sushi-bar concepts to be found there than anywhere else in Europe. In this issue, we take a look into one of the most spectacular restaurants the city has to offer in this genre: Nedal'nij Vostok (in English: the Not-So-Far East) was opened in 2007 by Arkady Novikov – probably the most influential figure in Moscow's booming eating-out market, especially in the fine-dining scene. The high-end formula, inspired by London's Zuma and Roka restaurants, combines a pan-Asian menu with a vibrant cosmopolitan ambience: a true firework of stunning design ideas (see pages 66/67).

## Affordable Treat in Tough Times



# Affordable Treat in Tough Times

For more and more quick-service guests, baking is as good as cooking. Bread-based dishes and snacks, as well as savoury and sweet products from the oven, are becoming increasingly popular, while operators are tailoring their foodservice concepts accordingly. At the same time, a growing number of bakers are pushing into the foodservice segment, especially in the German-speaking region. Their expertise when it comes to bread is the most credible. Moreover, mounting competition from the food retail trade frequently means they have no choice but to test the gastronomic potential. Part 1 of our pan-European survey portrays a category that is currently inspiring and driving the quick-service market like no other – bakery cafés.

### UK

It seems everyone – from fine-dining group Caprice Holdings to casual dining behemoth Pizza Express to Britain's biggest supermarket group Tesco – is trying to muscle in on the bakery-café space. The number of different companies and brands playing in this segment is perhaps one of the clearest illustrations of the blurring of the traditional boundaries in the eating-out market. The attraction to this part of the market is driven by a number of factors: the big restaurant chains wanting to drive incremental sales; an affordable treat in tough economic times; the desire to target qui-

et day-parts; the opportunity to capitalise on the consumer's growing demand for artisan baked goods; the realisation of pubs that they are often empty during the day while coffee shops are full, and so on. Consequently, the bakery café is a broad church in the UK. From the everyday cheap-and-cheerful **Greggs** fayre that adorns every town centre to the rarified delectables produced by the likes of **Paul** and **Patisserie Valerie** often against the backdrop on London's wealthiest high streets and suburbs. The coffee giants like **Caffé Nero** and **Costa Coffee** are increasingly focusing on baked goods amid efforts to improve their food offering

while pubs are adopting a café-bakery offer as part of the ongoing gentrification of the British boozier.

The proliferation of baked goods is illustrated by Horizons, the foodservice research firm, which found croissants on 10% of menus across the UK pub, restaurant and hotel sector, while brownies featured on more than 50% of menus and sweet and savoury tarts on almost 70% of menus.

According to Allegra Strategies, the near-24,000 coffee shops, sandwich bars and cafés in the UK account for £6.9 bn of the £40.5 bn spent each year on informal eating-out. But if we are to focus on the heart of this segment, then it is probably those concepts and businesses that operate the bakery-café in its purist form. This is best defined as those that are food-led (rather than coffee led), and where the production of the food involves some form of on-site process – be it made from scratch, or merely baked off on site after being made at a central kitchen. But in essence, as the bakery-café name suggests, these brands bake goods and run cafés.

This segment has attracted the attention of one of the restaurant sector's best-known investors, Luke Johnson, founder of Risk Capital Partners. Johnson, who bought and built the Pizza Express business in the 1990s, and is an existing investor in Ego Restaurants and Giraffe, has in the past three years bought three businesses in the space – **Patisserie Valerie**, **Druckers** and **Baker & Spice**, which between them have 66 outlets – the biggest collection of pure bakery-cafés.

Johnson says the growth in the segment can partly be attributed to travel and in-

# UK



**Druckers**  
VIENNA PATISSERIE

## Affordable Treat in Tough Times

ternational experiences, and consumers demanding more varied offers.

"Authenticity is important – we focus on the food in a way that many coffee-led operations do not. We make all our own products which is an important part of a validation with the customer."

"These type of businesses tap into all-day eating, they do not demand that customers sit and have a three-course meal – they can eat as much or as little as they wish. To a certain extent they are taking over from pubs as a place where people gather to meet and eat."

The three brands have been lumped together under Patisserie Holdings. Patisserie Valerie is a premium London-focused offer while Druckers is more mass-market, found in shopping malls around the country, with a particular focus on the Midlands. If Patisserie Valerie is premium to Druckers, then the niche Baker &

Spice, acquired out of administration, is premium to Patisserie Valerie.

Johnson aims to open at least one outlet a month under one of the three brands for the "foreseeable future". "We have no plans to exit," he says. "The business is doing extremely well and can fund its own growth."

Growth is also on the cards at **Paul**, the French brand owned by Groupe Holder, a fourth-generation family business. Under the direction of new UK chief executive James Fleming, Paul plans to add 50 units to its current 23 in London over the next four years. It also aims to build on its presence in transport environments, such as airports, through franchise agreements. Groupe Holder also has big plans for the USA.

"The market has become fiercely competitive," says Fleming. "In reality our competitors are all the food-led sandwich chains like **Pre**

### Business Characteristics

- In contrast to sandwich bars and coffee shops or fast-food chains with a focus on bakery products, they typically have baking/bread as their core expertise, ideally based round an on-site oven or bakery unit. However, the borders with neighbouring operational categories are becoming increasingly blurred.
- Represent international bread traditions from all over the world (Europe, Arabia, India, America).
- Typically dual-track operations, with retail (bread, cakes, pastries, etc.) and foodservice sections – including take-away business. All-day operations, particularly busy at breakfast time.
- Extended foodservice assortment including hot dishes (salads, soups, snacks) but still with a spotlight on bread and related products. Range of beverages focusing on coffee (specialties) and non-alcoholic beverages; in many cases, however, with a small range of alcoholic drinks (beer, wine). Hot beverages play a dominant role in the sales mix. High margins thanks to low food costs (bread, coffee).
- Restaurants' appeal involves chairs instead of bar stools in the foodservice section. Refined casual-dining ambience, although, in concept terms, it belongs more in the fast-casual segment (average bill, length of stay, rarely open in the evening); counter service or mixed-service modes as a rule.
- Brand and system compatibility is generally high. Depending on the market structure, there are numerous individual players, too.
- Olfactory marketing appeals to all age and income groups. The food and beverage portfolio is generally perceived as healthy, especially in comparison with classic fast food.
- Ambience can be nostalgic or contemporary, but generally quite warm and cosy. High-traffic locations are a must for success – often found in travel hubs or shopping centres.
- International benchmarks are set by Panera Bread, Le Pain Quotidien, Paul, Bread Talk, Princi (London)

FOODSERVICE EUROPE & MIDDLE EAST 6/10



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## Affordable Treat in Tough Times



**A Manger and Eat**, plus the coffee chains like **Caffe Nero** (which is currently advertising freshly-baked products) so it comes down to the quality of our products and the service. We are obsessive on product quality – it is our point of differentiation.”

For many of these businesses including Paul, merchandising is a huge part of its success. The shop-window displays are changed four times a day (breakfast, pre-lunch, afternoon and consolidation) in order to entice customers through the door. It is as much about running a retail operation as a restaurant.

Fleming is to unveil two sites before the New Year and then plans to open between 10 and 12 outlets in the next 12 months, with the aim of securing stores that can typically seat 50 guests. The ‘biggy’ for Fleming is to take Paul be-

yond London, something that will require one store to act as the mother ship (baking goods from scratch) serving other satellite stores in a classis hub-and-spoke distribution approach. This was how Paul first established itself at Covent Garden before a central bakery was launched later on. He says that while Paul will focus on its ‘fantastic’ core format, it will also experiment with express and kiosk variants as well as looking for more opportunities in travel locations, plus possible brand extensions into supermarkets.

After a brand overhaul, the 14-strong **Maison Blanc** business – founded by French chef Raymond Blanc and now owned by Kuwait-based KFG Group – is eyeing expansion. Chief operating officer Simon Wilkinson, who has been with KFG for just over a year, led a wide-rang-

### ■ ■ ■ Panera Bread: the Segment Pioneer & Leader ■ ■ ■

The Panera Bread legacy began in 1981 as Au Bon Pain Co., Inc. Founded by Louis Kane and Ron Shaich. Between 1993 and 1997 average unit volumes increased by 75%. Ultimately the concept’s name was changed to Panera Bread.

By 1997, it was clear that the bakery cafés had the potential to become one of the leading brands in the United States. Today, there are more than 1,400 units in 40 US-states and in Ontario/Canada, nearly 60% of them are operated by 48 franchise groups with various area development agreements. The average unit size is 4,600 sq ft (investment: \$750,000).

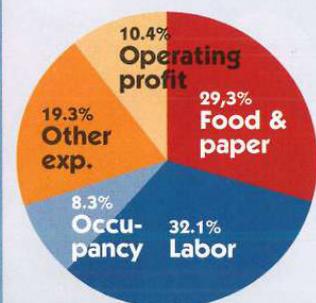


### ■ ■ ■ Units & Sales ■ ■ ■

Year	2009	2008	2007	2006	2005
System sales in \$m	2,793	2,649	2,271	1,911	1,596
Comparable sales *	+ 0.7 %	+ 5.8 %	+ 1.9 %	+ 3.9 %	+ 7.4 %
Bakery cafés	1,380	1,325	1,230	1,027	877

\* company owned units > \$2 m/unit

### – Bakery Café expenses as % of sales –



and coffee beverages such as hot or cold espresso and cappuccino drinks and smoothies.

“Our menu, operating systems, design and real estate strategy, allow us to compete successfully in several segments of the restaurant business: breakfast, AM ‘chill’, lunch, PM ‘chill’, dinner and take home, through both on-premise sales and Via Panera catering. We compete with speciality food, casual dining and quick-service restaurant retailers, including national, regional and locally-owned restaurants. Our goal is to be the best competitive alternative for those customers craving soup, salad or a sandwich.”

The concept has proven successful in a number of different types of locations, such as in-line or end-cap locations in strip or power centers, regional malls, drive-through and free-standing units. Most cafés also provide customers with free internet access through a managed Wifi-network. As a result, the brand is hosting one of the largest free public Wifi-networks in the United States.

One more statement from Ronald M. Shaich: “Since we went public in 1991, the stock is up more than 1,600% (on a split adjusted basis).” Yes, Panera Bread is a benchmark in many aspects (innovation, quality and finance). [www.panerabread.com](http://www.panerabread.com)

GW

## Affordable Treat in Tough Times

### ■ ■ ■ UK: Bakery Cafés ■

#### – emerging concepts –

Brand	Units
Baker & Spice	3
Bea's of Bloomsbury	2
Benugo	6
Buttercupcake Shop	3
Candy Cakes	7
Euphorium Bakery	7
Fernandez & Wells	3
Flat White	2
Hummingbird Bakery	3
Melrose & Morgan	2
Monmouth Coffee	2
Natural Kitchen	2
Nordic Bakery	2
Peyton & Byrne	4
Sacred	6

#### – Single Site Mavericks –

[www.cocomaya.co.uk](http://www.cocomaya.co.uk)  
[www.coxcookiesandcake.com](http://www.coxcookiesandcake.com)  
[www.gingerandwhite.com](http://www.gingerandwhite.com)  
[www.thehackneypearl.com](http://www.thehackneypearl.com)  
[www.kaffeine.co.uk](http://www.kaffeine.co.uk)  
[www.lantanacafe.co.uk](http://www.lantanacafe.co.uk)  
[www.themountstreetdeli.co.uk](http://www.themountstreetdeli.co.uk)  
[www.nudeespresso.com](http://www.nudeespresso.com)  
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ing root-and-branch review of the business that saw the introduction of better management systems, training programmes and a move to reposition Maison Blanc to more of an all-day offer. The operation has also been simplified, as illustrated by the reduction of the patisserie range from 120 products to 16 plus some seasonal items.

Wilkinson says the changes are having an impact with like-for-like sales running ahead at almost 15% in October. He and his team have identified 30-40 new locations for the business although they are not in any rush as they do not wish to "compromise the quality".

Wilkinson says a crucial component of Maison Blanc – like Patisserie Valerie and Paul – is the ability to be in complete control of the product. A central kitchen produces many items with final preparation, or 'bake off', taking place within each store. "Our own bakery delivers fresh products to all of our stores 364 days a year," says Wilkinson. "This business is about experience so the quality is key."

The way customers use Maison Blanc varies enormously according to store size and location, with some stores up at 80% eat in and others at 90% take-out. The brand has introduced a dinner menu with hot menu items in a bid to drive food sales further and increase the trading window into the evening.

A rival that has successfully capitalised on evening business is **Le Pain Quotidien**, the organic Belgian chain founded by Alain Coumont – and another import from mainland Europe – known for its communal tables. Having only launched in London just six years ago, the brand has in short order established itself as one of the stand-out bakery-café brands. For some Le Pain is a restaurant masquerading as a patisserie or café, but this is largely due to the fact that it genuinely trades all day, and because most of its sites are heavily skewed towards eat in.

The business was brought to these shores by entrepreneur Philippe Le Roux through franchise although in 2009 he agreed a deal to sell the operation back to the Le Pain parent company. Such has been the success of Le Pain in the UK, that four of the group's top 10 performing stores globally – out of a total of more than 150 – are in London. Shortly after completing the deal Le Roux handed over the managing director reins to Steven Whibley.

The group currently has 15 sites in the capital, having recently opened a store near foodie haven Borough Market, although like many of these operations is yet to step beyond England's first city.

Another of the relatively new kids on the block is **Apostrophe**, run by Amir Chen, a former investment banker who has now built the modern bakery-café brand up to 16 sites. Working in London he



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## Affordable Treat in Tough Times

### BAKERY CAFÉS



Italy



witnessed the success of Starbucks and Co but saw an opportunity to do something different, in the tradition of a French patisserie, with both great coffee and great food. "Apostrophe is rare in that the split between food and beverage is almost straight down the middle in every store," he says. "Most concepts in this market are skewed either toward one or the other, by at least 70-30."

Apostrophe will unveil its third airport site – at Gatwick – in the spring before possibly conducting a fundraising to fund an accelerated expansion plan.

He says one of the reasons for the segment's ongoing success is the appeal of the food. "This is comfort food. It is a food that people know and recognise and gravitate to," says Chen. "With our business we attract people who are looking for a bit more of an experience so the atmosphere, design and music is very important, although ultimately we're judged on product."

Of course, in the eyes of the consumer there are many more operators in this space aside from these food-focused 'purists', but what they have seemingly done though, is throw a spotlight on food quality and authentic products. The ripple effect can be seen across the industry. Every brand is intent on raising standards, be it **Greggs**, the blue-collar value

baker with more than 1,400 stores, which is currently trialling a next generation store, and **Krispy Kreme**, which is now up to 45 stores and in strong growth, or the "big three" coffee chains (Caffè Nero, Costa Coffee and Starbucks), which have all sought to improve their food credentials, especially Costa. "Everyone is fighting against a more knowledgeable customer," says Jean-Michel Orioux, who used to run Paul UK and is now managing director of dim sum chain Ping Pong. "It is all about the quality of the product."

There are some fantastic emerging brands in this space, such as **Bea's of Bloomsbury**, which has just opened its second outlet at the One New Change development in the City of London, and the **Nordic Bakery**, which has also just added its second site. Many of these concepts have been described as London's "third wave" of coffee bars – a new generation majoring on craft coffee and craft food products. Of course, the next big thing in this space is the cupcake, as seen in New York and as witnessed in London with the launch of **Cox Cookies & Cake**, a new alliance between shoe designer Patrick Cox and French master patissier Eric Lanlard. They currently have one shop in Soho, with another shortly to be unveiled.

### Italy

Bakeries in Italy have traditionally sold not only bread but all sorts of snacks, such as focaccia, pizza by the slice, panini, croissants and cakes. The traditional bakery, though, has had to rethink itself to survive under the pressure of competition from big supermarkets, just as other small retail shops have had to. In a growing number of cases the answer is to add bar service to the retail side of the business, to catch the breakfast and lunch clientele and, increasingly, to intercept the cocktail hour crowds, too. Most of the time the restyling of the old corner bakery entails no more than a shelf and a few stools, but in some instances there is a well defined café and restaurant area.

A forerunner is **Princi**, of Milan ([www.princi.it](http://www.princi.it)). A few years ago Rocco Princi, a baker working with traditional methods, e.g., stone-ground organic flours and natural yeast, slow baking in wood burning ovens, put a bar counter into one of his shops. The success was such that Mr Princi has remodelled all his shops and designed the new ones with a café area, serving breakfast, lunch and aperitivo in the late afternoon. Princi now has 4 bakery cafés in Milan and one in London's Wardour Street. Mr Princi is a frontrunner in more than one sense – apart from pioneering the bakery café concept in Italy, he also was among the first to reintroduce the old artisanal methods of baking, and to make bakeries attractive and 'cool' places by enlisting famous architects for the interior design and dressing his shop assistants in uniforms designed by Armani.

Another major bakery chain making the transmigration into the bakery café category is **Pattini & Marinoni** ([www.pattiniemarinoni.it](http://www.pattiniemarinoni.it)). There are five shops in Milan, two of them with a bar and seating area, and one with a wine bar and restaurant.

Outside Milan, an up-and-coming bakery café chain is **Redipane** ([www.redipane.it](http://www.redipane.it)), the brainchild of Andrea Gaibazzi, scion of a family who have been making bakery ovens and equipment for generations. Banking on the family industrial experience and connections all over Italy and Europe, Gaibazzi launched the Redipane concept as a sort of Noah's ark of typical and local bakery products. Redipane have selected a network of artisans all over Italy and even abroad who are noted for making local authentic specialties, such as

# Affordable Treat in Tough Times

## BAKERY CAFÉS

# Spain

Taggia torta verde (a vegetable pie from a small town in Liguria) or French baguettes and croissants (made in France according to the traditional method). The products are uncooked or half cooked, chilled and delivered to the Redipane delivery platform and then on to the individual outlets where, depending on the products, the last stages of raising and cooking take place. This network ensures that recipes and flavours are authentic and helps give new life to vanishing or struggling local artisans, who don't have access to a large market. All Redipane outlets also have an on-site kitchen for the lunch menu, which is "coherent with the bakery world", explains Gaibazzi. One example is the 'bread lasagna', slices of unsalted bread with cold cuts and ragout. All panini are made to order. Bread, cakes and bakery products account for 60 % of sales, the café side for 40 %. All cafés usually have three areas: a lounge with sofas, a breakfast area with small tables and a lunch area, with bigger tables. The cafés are open every day from 7 am to 9.30 pm. There are currently 8 Redipane bakery cafés, all of them in the Emilia Romagna region, with another four scheduled to open in the next few months. Of these four, one (in Reggio Emilia, 420 sq m) is directly owned, the other three are affiliated and two of them mark the first foray of the brand outside Emilia Romagna (one will be in Gallarate, north of Milan, the other in Civitanova Marche, on the Adriatic coast). Redipane plan to have 20 company-run and 20 affiliated outlets in the next 4 to 5 years. Although chain concepts are in the embryonic stages, bakery café concepts are growing very popular with independent owners and making headway not only in

the North of Italy but also in the more traditional South.

One example is **3 Lire**, in Naples, a bakery and delicatessen shop with an eat-in area and a coffee bar counter. A huge spit is one of the eye catching features of the place while a glass wall enables clients to see the bakers at work, making bread, pizza, focacce, pies and cakes. There is a daily hot-food menu.

Not far from Naples, in the Campania Mall in Marcianise, is **16 Libbre**, a multifunctional bakery café wine bar restaurant, open 7 days. Bread takes centre stage from early morning until late night, as all meals and snacks revolve around it. Both 3 Lire and 16 Libbre have been designed by Costagroup.

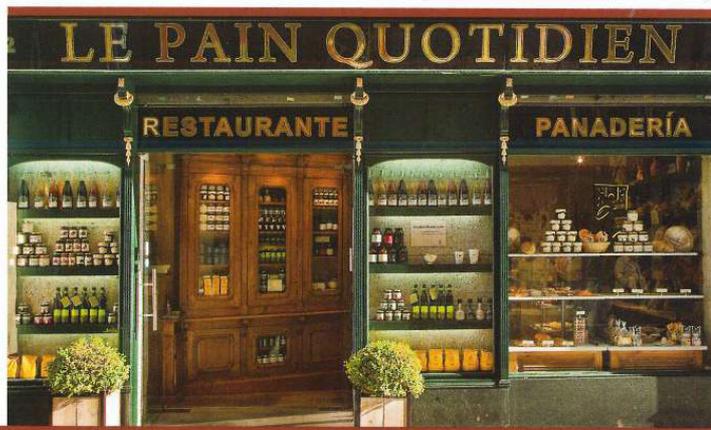
## Spain

In Spain, as in many other countries, what began as an answer to the restructuring of society – especially the huge influx of women into the working world – as well as the need to differentiate bakers' from the

food, attach great importance to an attractive setting.

As in a number of other foodservice sub-segments, Barcelona can claim to be an important birthplace of Spanish bakery cafés. Brands such as **Pans&Company**, **Bocatta** and **Vienna** as well as the **Central Café** coffee-bar concept, were some of the evolutionary driving forces of the mixed bakery, snack-bar, café and restaurant formulas mentioned.

Now: Back to the beginning. Over 25 years ago, Xavier Parera launched **Bopan** ([www.bopan.cat](http://www.bopan.cat)) in the Catalanian metropolis. Today, he runs five outlets there, all with a magnificent cornucopia of high-quality breads and bakery products, as well as sausage and other delicatessen products, professionally presented in a lovingly, opulent and highly aesthetic manner. Plus breakfast, sandwiches, salads and ready to eat sweet or savoury dishes. Burgers are offered for €6-7.5, quiches for €6.4 and tartines for €10 – everything to take away or consume on the stylish and comfortable premises. By



growing competition of supermarkets and filling stations, has developed into a serious competitor for fast-food concepts. Bakery cafés are becoming increasingly popular in Spain because the range of products is attractive, because the products are filling and quick to eat on the spot, because bread and its 'derivates' are regarded as healthy fast food, and because the products are affordable – a great success, especially in times of economic crisis. Additionally, the assortment fits in nicely with Mediterranean tastes and eating habits. It is also fully compatible with popular coffee specialities and is a hit with women of all ages who, besides appealing

shifting the accent away from the purely retail business to a more pronounced gastronomic interpretation, Parera laid the foundation for casual fast food in the bakery segment – a conceptual milestone. Each Bopan outlet has its own outfit. One has a classic Parisian look, another is rustic in style while another makes an urban cosmopolitan impression. Each is adapted to the structure of the district via its 'outfit' and assortment. "Our target group comprises freelancers, the middle and upper classes, and cultivated guests who appreciate our service as a whole", says Parera. Total turnover including catering is estimated at €5 m and the foodservice

## Affordable Treat in Tough Times

share in the 'resto-panaderías' at over 50%. Instead of further expansion, the current focus is on constantly improving the range of products and services offered. Today, successor **El Fornet d'en Rosend** ([www.elfornet.com](http://www.elfornet.com)), a family company founded in 1927, which underwent a strategic reorientation in 1992 when it changed from having a purely bakery to a foodservice orientation, has 40 units. Based on centralised production, this formula of Grupo de Panadería Pan Rosendo offers not only a wide, range of attractively presented bread and pastries – 95% of which comes from its own production – but also salads and sandwiches (€2.5-4). The latter are also available as set meals for €9.5 including a beverage and dessert. The spacious interior design based on fine woods and comfortable sofas creates a second living-room ambience in English style. The latest unit has 400 sq m and – a first for the group – also serves alcoholic beverages. In addition, the company offers a catering service.

Also run by professional bakers or industrial preliminary-product suppliers are

**Hansell** - a bakery-shop formula founded by Francesc Altarriba, which spotlights creative bread ideas, focaccia and open sandwiches, and also includes a cafeteria – and **L'Obrador del Molí** ([www.lobradordelmoli.com](http://www.lobradordelmoli.com)), which belongs to Catalonia's multinational Europastry Group. The Spanish market leader for deep-frozen pastry owns the **El Molí Vell** bakery-product chain, which has over 100 outlets in Catalonia (most of them in Barcelona) – including around 60 bakery cafés where bread sales account for an estimated 50% of revenues. Salads, pizzas, coffee and other beverages make up the other half. In mid-October 2010, the company opened a premium version of its formula, L'Obrador del Molí, in the Sarrià district – a bakery workshop with a visible production and a sampling zone. The idea: high-grade bread and bakery products based on the best ingredients, long fermentation of the sourdough and respect for natural processes. All are kneaded, formed and baked in front of customers and guests – genuine baking craft with a sense of tradition.

An important catalyser for conceptual reorientation of classic bakeries is undoubtedly the 'Sandwich Forum' founded in 2003. This annual congress at which the leading players from the sandwich bar, coffee bar and bakery shop sectors get together with manufacturers from the preliminary stages of the bread industry focuses not only on product developments and studies on the market and guests but also on new concepts and ideas – a confidence booster for looking at things in a new way. [www.sandwichforum.com](http://www.sandwichforum.com)

In distinction to many of the recipes, the production facilities are anything but traditional. "Thanks to the latest technologies, we don't have to start work very early in the morning", says Jordi Gallés, who is responsible for the relatively new concept. "We can schedule the products very precisely without having to dispense with a long fermentation period for the sourdough, the secret of good bread. With this concept, we have shown that artisan production and modern technology are not diametrically opposed to each other" – and not in opposition to a large company

### BAKERY CAFÉS



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### BAKERY CAFÉS

specialising in deep-frozen pastry either. The total area of 250 sq m is divided into four zones: the visible bread workshop with 130 sq m and five permanent employees, the sales and tasting zone focusing on salads (€6), bocadillos (€5), quiches, 'cocas' and focaccia and a 'multi-function room' where bread tasting, courses, etc. are to be held. "We want to promote the culture of making and eating bread, put down roots and become part of life in this district." At present, no offshoots are planned, says Gallés. The turnover target is €600,000 p.a. Investments in the site are estimated at €500,000.

Other examples near the Ramblas boulevard: the French **Paul** concept ([www.paul.fr](http://www.paul.fr)), which now has four outlets, and **La Mie Caline** ([www.lamiecaline.com](http://www.lamiecaline.com)).

Bakery shops took longer to gather momentum in Madrid. The pioneer here was **Oriopan**, a 'boutique de pan' with seven outlets founded in 1980 that became renowned thanks to its high-quality prod-

Fritsch in 2008. The sandwiches come in three types: 'classic', e.g., with cheese and cooked ham, 'selección', e.g., with Roquefort cheese, and 'gourmet', e.g., with salmon or roast beef. Additionally, customers can buy sweet pastries and empanadas with a variety of fillings – and, of course, coffee, hot chocolate and cold beverages. At present, Hirtz operates three units in Madrid.

Worth a look outside the major cities are **Panishop** ([www.panishop.com](http://www.panishop.com)) in Zaragoza and **Polvillo** in Sevilla ([www.polvillo.es](http://www.polvillo.es)). As are **Dona Vaniri** in Galicia ([www.donavaniri.es](http://www.donavaniri.es)) and **Vizcarra** in the Basque region.

And the future perspectives for this sub-segment? There is plenty of momentum there, without doubt, and anyone who combines good quality and a range of products oriented to the needs of the target group with a suitably urbane setting has good chances of long-term success.

### The Netherlands/Belgium

provide a peaceful oasis for their busy customers. In a warm, Mediterranean atmosphere, you will find a large reading table, with soft classical music or light jazz coming from the speakers. And free Wi-Fi. 'For bagels, espresso, and happiness'. In 2009 Bagels & Beans was named Franchise Formula of the Year. It has 42 locations (most of which are franchises) in 25 Dutch cities. [www.bagelbeans.nl](http://www.bagelbeans.nl)

**Bakerstreet** is to be found at busy locations with lots of traffic (A1) in and around the big cities in the Netherlands and in Belgium. There are three kinds of store: 'to go', 'sit down', and 'shop in shop'. Commonly found locations are service stations, garden centres, hardware stores, and furniture centres. Their selection comprises sandwiches, salads, fresh juice, savoury snacks and sweet treats. A popular choice at Bakerstreet is the 'sandwich your way', where customers choose their own combination of bread and toppings. Bakerstreet designed the Flow formula especially for Shell service stations. Food ar-

## The Netherlands / Belgium



ucts and high-grade ambience. However, the bakery-shop idea did not really take off until **Le Pain Quotidien** ([www.lepain-quotidien.com](http://www.lepain-quotidien.com)) opened a pilot store there. Within two years, the formula could boast six outlets – all in Madrid and all very well positioned strategically (one of them is on Plaza Mayor). By 2014, the company plans to have opening a total of 30 units in Spain, 15 of them in the capital, says Nahuel Román, the brand's CEO in Spain. The first LPQ in Barcelona is scheduled to open its doors in 2011. For 2010, the turnover is estimated at €6.5 m.

Also worthy of note: **Entremigas** ([www.entremigas.com](http://www.entremigas.com)), a small-area, fast-casual concept focusing on sandwiches, which was launched by Federico

With more than 60 locations, the biggest player on the Dutch bakery café scene since 1984 has been the original French **Delifrance**. Their selection consists entirely of French breads and pastries, but they have also adopted new trends, such as serving breakfast, adding healthy foods and more vegetables to the menu and offering smoothies and shakes. They also have a club card, discounts, and a loyalty points system through which customers can earn free meals.

Runner up is **Bagels & Beans**. With their freshly baked bagels, organic (where possible) toppings, freshly squeezed juices, espresso and cappuccino made with freshly ground fair trade coffee, coupled with their friendly service, they aim to

eat are open plan and the concept aims to appeal to all the senses. Premium coffees, healthy juices, and sandwiches to go with freshly baked bread and fillings. A good choice for in the car, or at school. The first two 'Flow' pilot locations will be opened in the autumn of 2010. Bakerstreet is present in 15 locations. [www.bakerstreet.nl](http://www.bakerstreet.nl) Food that is honest, robust, solid and healthy, but above all, really delicious. That's the impression that **Broodzaak** aims to make in train stations. Broodzaak (with 3 'o's) is the new formula from Servex, the foodservice subsidiary of the NS (the Dutch Railways). The locations used to be called 'C'est du pain', had a French feel, and served mainly croissants, filled baguettes and pastries. In 2008, all

## Affordable Treat in Tough Times

the locations were remodelled and turned into 'Broodzaak' shops, with the trusted look and feel of a traditional Dutch bakery, though now self-service. This allows customers to be served more quickly, even at peak times.

The range includes freshly baked artisan bread, dressed sandwiches and buns, and snacks from the 'treat yourself' table, cakes and cookies, coffee, juice, dairy, and water. The 30 locations are all at train stations. [www.broodzaak.nl](http://www.broodzaak.nl)

Originally a Belgian formula, **Le Pain Quotidien** has been in business for the last 20 years. It is the brainchild of Brusselite Alain Coumont, who was deeply attached to his grandmother's rustic sourdough bread and created a slow fast food chain (see box) based around it. The brand can be found in 14 Belgian cities, often in multiple locations. The Netherlands was remarkably late jumping on the bandwagon. The first Pain Quotidien appeared in De Pijp, Amsterdam's Latin Quarter and, in August 2010, an outlet was opened in fashionable Old South. [www.lepainquotidien.be](http://www.lepainquotidien.be)  
[www.lepainquotidien.nl](http://www.lepainquotidien.nl)

'Cool and fun' is the formula for **De Bakkerswinkel**. Their selection includes artisan bread, savoury and sweet tarts, scones and canapés – for breakfast, lunch, afternoon tea. It is not a chain; each store is different and depends heavily on the location, which must always retain something of its own character. The interior design for the Bakkerswinkels was done by Piet Hein Eek, the best-known Dutch interior designer today. His design respects the interior space, whilst retaining the greatest possible freedom and flexibility in a safe, homely, familiar space to which people like returning.

The effect is created using reclaimed wood and other vintage materials. The second-hand floral tea services, tea pots, fresh flowers, old photographs and paintings are typical of the shop style. One can even arrange to get married in some of the Bakkerswinkels. The founder is Piet Hekker, who is also part owner of Proef, Marije Vogelzang's restaurant/catering project. His ambition is to bring people of widely varying backgrounds together for healthy and delicious local food.

### BAKERY CAFÉS



Today there are 7 Bakkerswinkels with seating; 3 in Amsterdam, 1 in Utrecht, Zoetermeer, The Hague and Makkum (Friesland) respectively. Additionally, there are 3 take-away shops and one shop which specialises in cakes. [www.debakkerswinkel.nl](http://www.debakkerswinkel.nl)

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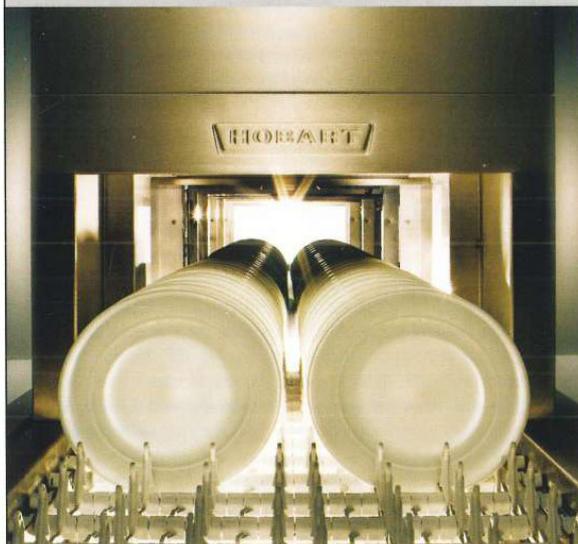
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# Intuitive Innovator

Blending artisan bakery, cafe and bistro within a stylishly rustic setting, Le Pain Quotidien has brought a fresh, lifestyle edge to the commodity-driven world of the bakery shop. Now with over 80 branches across 14 countries, this highly original concept was the brainchild of Belgian chef Alain Coumont. He talks about the inspiration for innovations such as each store's centrepiece communal table and his views on organic produce and ethical purchasing.

Interview by Bruce Whitehall.

**Le Pain Quotidien has been hailed as one of the most innovative of current foodservice concepts. Where did the inspiration come from?**

**Coumont:** It just somehow emerged. I started with the idea of a nice brasserie in Brussels. I had no specific business plan or even the notion that it would become a business. It was more of a hobby. I did not wear a business suit – just blue jeans and T-shirt. And I did not worry too much about the numbers or making a profit.

However, I wanted to be able to offer good bread and finding a good source proved difficult. I concluded that the only way to get what I wanted was to bake it myself. So I bought a big (3 tonne) dedicated

bread oven for €4,000. It was a bit crazy for just one restaurant but I concluded that I could maybe do a bit of wholesaling and maybe open a retail outlet.

**What influenced your choice of decor and your use of a large communal table?**

**Coumont:** I rented a very small shop premises in Brussels, at about €300 per month. With traditional-style bread in mind, I felt the premises should also reflect an old-fashioned, nostalgic theme, so that led to the rustic look of the walls and the shop-front. For furniture, I checked out a couple of antique stores, more like the flea market type of shops rather than high class places. I was attracted to a very large table and decided to try it.

The first store, with the bakery in the basement, was so small that the single big table took up most of the space. The idea of sitting around a table and sharing bread influenced how we named the store. Basically, I wanted to capture a countryside feeling. At one point, I was a little afraid that some people might read Biblical or religious overtones into the Daily Bread name but there have never been any bothers. So all the basic elements were in place from day one.

The communal table has become the symbol of our brand. We try to transmit the idea of mutual sharing to both our customers and staff.

**What do you think about other people – even McDonald's – now using communal tables?**

**Coumont:** A lot of people use them but they often tend to be sufficient for maybe 8-10 people. Ours are so large that they are more like those used at a banquet. They work as the centrepiece of each restaurant. In our newer and larger places, like at the Royal Festival Hall in London, we have a variety of other seating but we always try and have as big a table as possible, ie 6 m long with 24-30 seats in a prominent position. That makes a very bold visual statement.

**When you had just one store, did you ever think it would develop into a chain?**

**Coumont:** When I opened the first store, I was trying so hard to get the business to work successfully that I did not have time to think ahead. But about a month after opening a lady came over and said: "I love your bread – if I set up a store which looks like yours, can you sell your bread to me?" That's how the franchise idea first got started – in a matter of three years, we grew from a single store to 15 around Belgium.

**We try to transmit the idea of mutual sharing to both our customers and staff.**

We had a very easy type of franchise system. The franchisees did not pay any royalties on sales at the beginning and contracts were based on handshakes. The only provision was that they had to buy all our bakery products. That was fine initial-

ly, when selling bread was the main business. But little by little, the restaurant part of the business grew and more and more premises opened on larger sites with more seats.

**How has your approach to franchising evolved?**

**Coumont:** We eventually had a business where the head company was not making any money on 60-70% of the business. This led to a much more specific and disciplined approach to franchising. I am an optimistic and trusting human being but, looking back at my experience, I have become convinced that it is important to have good contracts in place.

I would say that when I started the company, everything was basically subconscious and instinctive. I did not really think about it. LPQ was born rather than made. And just as when a child is born, you try to be a good parent. But as soon as they are 6 months old, they have a life of their own and you just try to put them on the right rails.

**You had to surrender ownership of the brand in the mid-1990s (to a flour**

**milling company) but helped buy it back, with private investor backing, in 2004. Do you still feel as committed to the brand?**

**Coumont:** I could have gone bust but I am happy, 17 years after I started the business, that I am still involved. I'm glad to say that I'm still alive and did not die of a heart attack from exhaustion. After the buy-back, we managed to re-establish the brand in our Belgian home market and also did a lot of fine tuning which greatly helped improve our operational performance. I'm still here and feel very comfortable about that.

**Exporting the brand**

**There are now over 80 LPQ stores in 14 countries. How have you managed to spread the concept internationally?**

**Coumont:** We now have a dedicated development team who are focused on franchising. We also have specialist back-up personnel who go in every three months and focus on aspects like kitchen operations. I also do a lot of travelling myself –

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# Intuitive Innovator

## INTERVIEW



Photos: Thomas Fedra, BW





maybe too much – and I am training a couple of young people to travel round the world liaising with franchisees. Both started at the bottom of the ladder.

The business now spreads from the USA to Australia and we currently have contracts on the table for Mexico, Korea and Japan.

**What did it take to break into the New York market, where several European foodservice operators have had a tough time?**

**Coumont:** We now have 16 locations in Manhattan and 9 in Los Angeles. All US stores are company-owned with no licensees. I came to NY and lived out of a suitcase. We found and bought a property which enabled us to do everything under one roof, with the baking downstairs and retail area on ground level. We took the same approach in USA as we had in Belgium: 'let's go do it'. That is, of course, very much the American way. When you have no money, you do things differently. You don't spend money on feasibility studies and you do half the jobs yourself, from hammering in nails to getting plumbers if leaks occur.

Some people start a business and at a certain point they make a confusion over what money they are actually making; for instance, the

difference between what is coming into the tills and what they actually make after everything else is paid for. I chose not to pay myself for five years. I had very small reserves so I invested myself in the business. As long as you are not starving, why not work 20 hours a day?

I think it is important to have some notion of what it is like to be a little bit starving. Taking the Broadway show analogy, it's a bit like actors. I know that some come from wealthy families but most have to have to work like troubadours or circus performers, taking only a basic income. You do it because you believe in what you are doing, and in the long term, there is a chance that rewards will be high.

**The London-based Pret A Manger sandwich brand had a lot of difficulty breaking into NY. Why do you think that happened?**

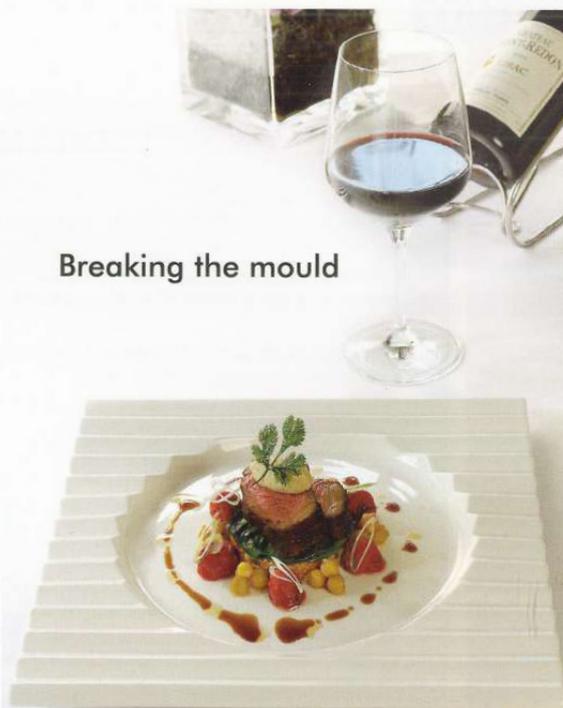
**Coumont:** I have a lot of respect and admiration for them but I think the challenge in NY is that on every street corner you get a little deli, making sandwiches to order. Maybe Pret was too simple for the US market, but they are doing OK now. For us, one advantage has been table service; American consumers love service and they are prepared to pay for it.

**What are the main challenges of dealing with relatively short-life products?**

**Coumont:** Most of our main menu items are bread-based and assembled to order in each store on an open work station. Dough production is handled traditionally with unhurried mixing, kneading and proofing at one central bakery in every city. Distribution varies; in the USA everything is made and delivered fresh to stores while in the UK and some other markets, some of the product range is frozen. I see that as entirely natural; freezing is a very natural way to preserve things with no loss of flavour.

Doing things in a natural way is not always easy technically since you are dealing with a live product. You need a little magic powder sometimes. But it's a choice we choose to make. I would not want to sell a

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## INTERVIEW

### Le Pain Quotidien

**Established:** 1990

**Head office:** Brussels, Belgium

**Systemwide sales:** over €100 m in 2007 (€80 m in 2006)

**Concept:** good value, high quality organic produce in a convivial rustic setting

**Main products:** Organic artisan-style bread (mainly sourdough), croissants and brioche, with range of fillings to order plus salads, soups, cakes and patisserie, coffee and wine

**Retail product range:** Organic loaves and cakes plus about 100 organic packaged oils, vinegars, spreads, sauces, etc.

**Typical store sales breakdown:** eat-in 70%; takeaway and retail 30%. Main meals 50%; coffee 10%. Bread and retail products 9%

**Average spend per head:** €5 (retail); €12 (dining).

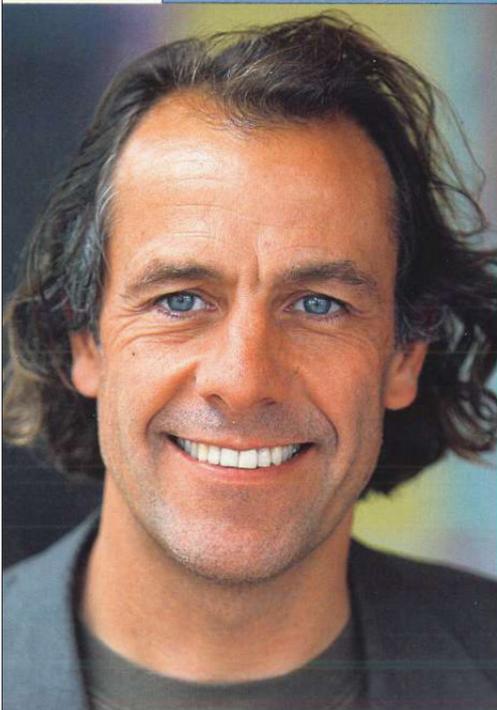
**No. of outlets:** over 80 in 14 countries (Belgium 24, USA 30, France 7, UK 8, Dubai 4, Kuwait 3, Switzerland 3, Australia 2, Turkey 2, Russia 2, Qatar 1, Bahrain 1, Spain 1, Mexico 1 (by June 2008).

**Trading:** from 7.30 am to early evening (later at suitable locations)

**Franchising:** Most new stores are franchised, with an Area Developer structure favoured in Western Europe (apart from France, where individual franchises for single units are still available), Asia and South America. Area Developers have the exclusive rights to develop, operate and own all stores in their specified area. Area Developers are typically expected to have a minimum net worth of €2 m, with at least €1 m in liquid assets.

Area Developers pay an initial development fee to LPQ, which grants them exclusive right to develop a specific territory within a certain time frame. The Development fee is approximately \$40,000 per projected store. Monthly on-going royalty is 5% of gross sales plus a further 2% for systemwide and local marketing. Within most countries, Area Developers are required to open a minimum of 8-15 stores within the first 5-7 years.

[www.lepainquotidien.com](http://www.lepainquotidien.com)



product to the consumer which I would not want my kids to eat.

**With more and more high street businesses serving sandwiches, coffee and bread products, how readily can LPQ retain its edge?**

**Coumont:** The only thing that I know is that we are bringing a little bit of the countryside into the city – in fact it is not even the real countryside but it is the same basic fantasy anywhere in the world, whether for Americans or Europeans. It is basically about the food which poor people would have eaten 50 years ago – nowadays the rich like to act like poor and they are ready to pay a premium for something which used to cost very little.

### Menu development

**At what stage did you become committed to a more ethically-aware approach, such as the systemwide use of organic ingredients?**

**Coumont:** About ten years ago, I started to feel despondent about what I was doing. I had by that time acquired two partners to help stabilise the business, and the money was coming in. In that situation, you can have a very comfortable living. But I started wondering if that was enough. In my own personal life, I had got used to going into health food stores and buying organic vegetables and bread but I thought: why am doing this only when I am at home? I started to realise that,

**I don't like it where a great chef talks as if he invented the tomato.**

while we applied traditional, hand-made methods to our bread-making, our ingredient buying policy meant that we were, basically, poisoning thousands of people every day in our 50 stores. The challenge was to reconcile the business side with the wider needs of the environment and social responsibility.

**How easy was it to change in view of the much higher prices for many organic items?**

**Coumont:** I think that too many people in foodservice are obsessed with keeping prices down rather than trying to understand what is the right price. With organ-

ic, you get much closer to the realities of the land and the environment. We were able to change things at LPQ because we were still a relatively small business. We instituted a number of changes, including purchasing organic flour. That meant paying double the price but it proved to be a great

**Too many people are obsessed with keeping prices down rather than trying to understand what is the right price.**

strategic move. I was able to prove that we could increase your meal bill by up to 60% and still, with a switch to organics, retain a loyal customer base.

In New York, the flour for one of our baguettes, selling at \$2.50, cost us about 12 cents. When we went organic, that jumped to 25 cents. But we found that we only needed to increase the selling price from \$2.50 to \$2.75.

After switching the flour, we moved to organic coffee and then organic milk. Little by little, we managed to bring in more and more organic product. What we did find, however, is that organic ingredients are not so easy to get. We found that you have to get a lot more involved with your suppliers. But one of the great things about organic is traceability. You can basically go back to the piece of land where the product came from. You get to know your farmers.

We already had some established suppliers, for instance, of olive oil. I said to them: I want you to become organic. They were already applying traditional, organic methods to what they did so it was more a question of encouraging them to get certification for their products, which ultimately helped their business.

Everybody benefits, not just customers but suppliers. The farmer is paid a better price to do a better product. They are proud to be farmers and believe in what they are doing. Their families are more

likely to stay in farming. They make better money and they enjoy life more. This encourages me to feel that organic is the right way to go.

**Are you now 100% organic?**

**Coumont:** No, but we plan full certification in 2008-2009, depending on local factors. All our bread baking facilities are now certified and all our wine, coffee and tea, milk, butter, charcuterie, soup and chocolate are organic, plus many other items on both our menu and in our retail range.

A separate sourcing problem for bread-makers at the moment is the doubling of the wheat price during the last year. Many farmers don't want to grow wheat any more and prefer to grow corn because George Bush put in a lot of money to encourage manufacture of gasoline with the corn derivative ethanol.

In terms of other menu items, I feel there is now a definite move to a more vegetarian and vegan way of eating, so we try to have a lot of dishes without animal products. Consumption of animal products

**Le Pain Quotidien was born rather than made.**

in the West is now way too high; it is no longer in step with daily protein needs and requires a bigger environmental footprint than vegetarian items.

**Is it practical to apply an ethical approach in other areas?**

**Coumont:** We now see responsible and ethical production and purchasing as the only way to go. We aim for sustainability with our wooden furniture, using reclaimed or reused sources such as railway carriages. We also, wherever possible, use packaging and disposable products from sustainable or recycled sources.

**Does the preference for organic put you in the luxury price bracket and does this in turn mean you are becoming a bit exclusive and elitist?**



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## INTERVIEW

### Personal Perspectives



#### What led you to come into the foodservice industry?

**Coumont:** I was born into a family of hoteliers so I had early experience of being in a food business. So much so that when I was a teenager I thought of getting out altogether and becoming a veterinary doctor. But I concluded that you cannot escape your genes. I had the opportunity to attend a small hotel school in Belgium – basically a place where you studied to be a hotelier and restaurateur, learning every aspect of both businesses. That taught me a lot, from cleaning the linen to being a wine sommelier, and was very important. To me, the restaurant business is like a Broadway show. You need a good script, good actors, a comfortable venue, good PR. So many things matter: opening the place on time each day, clean toilets, smiling staff, consistent food quality. It's a very complicated business and if you have just one element missing – for instance, great food but poor service or bad locations – you risk failure. That's why so many restaurant businesses go bankrupt.

#### You started your career as a chef. What motivated that?

**Coumont:** At the last Food Service Summit in Zurich, I was described by fellow-speaker Louis Le Duff (owner of leading French bakery manufacturer and retailer Groupe Le Duff) as a Michelin two star chef. That was kind of Louis, but not true. I never had a Michelin-starred restaurant. However, when I was at hotel school I had experience of working in three of the five best restaurants in France, all with three Michelin stars, including that of Michel Guérard, the creator of Cuisine Minceur. I even wrote a cookbook with Michel, published in 1987, which was co-signed by him.

#### Has being a chef shaped the way you approach business?

**Coumont:** I think you need a certain generosity of spirit as a chef because cooking is basically about giving. You focus your attention on turning simple ingredients into something which you want people to enjoy. Also, you have to give a lot of yourself physically, because the work can be very demanding. The great thing about food is the variety – we are not obliged to eat the same plate every day.

#### What other attitudes do you think are important?

**Coumont:** I think you need to take a broad view in running any business. I came into the business with a consumer perspective, in the same way as some wine makers start as wine lovers, i.e. with an amateur approach. I think foodservice is also a business where you can contribute to society. If you only go into business to try and become a billionaire I think that is the wrong attitude.

#### Now that LPQ is well on course to be an international brand, are you interested in getting into other types of business?

**Coumont:** I am to a small extent in the wine business, with a line of organic wines which I introduced two years ago and now sell to my own stores and elsewhere. This is a separate business, called Bioghetto and based in the south of France, and it specialises in cool, inexpensive organic wine. We aim to sell quarter of a million bottles this year.

We try to take a fresh approach to marketing. Our wine is called RN13 (Rouge National 13% alcohol content) and the label has a picture of the Tour de France with people having a picnic at the side of the road. However, the organic wine market is

**Coumont:** I don't think so. For example, our organic coffee, milk and sugar are the same price as Starbucks. I like to think we are accessible to everyone. One good thing with our concept is that we are aiming at the aspirational consumer and so can charge a realistic price. But even though we are relatively expensive alongside standard bakery shops we still, at

€10-20 per head for eat-in meals, fall into the affordable category. Thus many people can readily afford to eat with us every day and people with lower incomes also use us, maybe more as little luxuries for the weekend. I like to say, as a joke, that, even if you are homeless in NY, you can come to us after a good day begging in the subway and buy an organic coffee and

a croissant from us. In some respects, we are a similar concept to Paul, the French patisserie, but at Paul, diners get their food from a counter and then sit down to

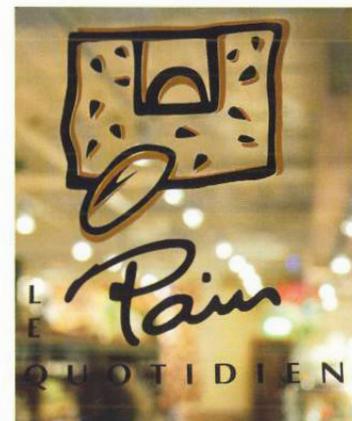


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still small. The main factor in selling this kind of product is that most people will drink a wine because they like it; they don't care whether or not it is organic.

**Who do you particularly admire in the world of foodservice?**

**Coumont:** In quickservice, I have a lot of admiration for Julian Metcalfe. Although it has taken time to get it to work in some countries, Pret A Manger is a brilliant concept – very well thought-out.

**What particular personal values do you most admire?**

**Coumont:** Being simple and down-to-earth. Foodservice is a profession where you naturally have a lot of ambitious people but you can also have too much ego. I don't like it where a great chef talks as if he invented the tomato and keeps on reminding you every five minutes that he is the greatest chef on the planet.

In many ways, the most admiration I have is for a small restaurant where people stay in the same kitchen for many years and turn out consistently good food for a small number of diners each day. I think it is better to live below the radar. I also think a good thing is to have a concept which stands on its own. LPQ does; nobody knows who is behind it and I think it is better like that.

eat in. At LPQ, a waiter comes, takes the order and then brings the food. So while we operate a simple concept, it is fullservice just as if you were dining in a white tablecloth restaurant. Some people don't want to wait in line. Also, if they want an extra drink, they have to go back in the queue. I think that is important to quite a lot of the population.

**Do you see yourself as a baker who caters, or as a restaurateur?**

**Coumont:** It's a question I am always asking myself. Our focus is on bakery but to me most bakery shops are about selling commodities. We aim to meet a range of needs through the day. For instance, we have a very strong breakfast offer, starting at 7.30 am and we trade through until 7 pm at night. Some branches even open until 11 pm, par-

ticularly in locations where people are going out to the theatre and have a short time to eat. The branded coffee bars, by contrast, often have no trade in the evening.

**Does the menu vary between different countries?**

**Coumont:** When you move to other countries, you need a certain amount of flexibility to adapt the concept, such as no alcohol in the Middle East. But we manage to keep the same menu in all countries although we are not rigid about that. If some markets

demonstrated that we needed to be a bit more flexible, then we would do so. But you have to be very careful and know your borders or you start to lose your focus.

For example, we have had consumers in the USA asking us for 10 years if we can make bagels. I am sure that we could sell a reasonable quantity of bagels and maybe get a couple of million dollars in sales. But I think it would be what I would call a negative sell. It would work for a while but we lose our soul little by little. ■

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**The TOP 100  
Sales Ranking of  
European's Biggest  
Food Service  
Companies**

**2**





Los grupos de restauración en España han pasado casi siempre desapercibidos en los rankings elaborados por las revistas económicas; no así en la prensa profesional. En cambio a nivel europeo siempre ha habido interés en conocer, en cualquier medio, profesional o no, su existencia, evolución y comportamiento.

Si no nos vamos más allá de los años 90, en la profesión se manejaban, con independencia de los estudios y clasificaciones de consultoras como Gira, al menos tres referencias. Las listas elaboradas por Peter Backman desde el Reino Unido; las construídas\* desde la revista Neorestoration Magazine (en especial desde que aparece Jacques Borel y sus discípulos) y finalmente, las que coordina Gretel Weiss para su revista internacional, si bien en su origen se apoya en Backman.

Un editorial de WyW en 2002, es el pistoletazo de salida de uno de los trabajos más arduos de la revista, en materia de recolección de información actualizada y homogénea.

Son listas que inicialmente poseen dificultades para convencerse, el que las trate, de la verosimilitud de los datos, dada la dificultad de armonizar, sectores, fechas, métricas e interrelación entre empresas, matrices y filiales. Pero no cabe duda de que, las tres fuentes citadas, terminaron por aportar brillante luz sobre un sector difícil, en cuanto a manejo de datos y estadísticas.

Por eso, pese a la utilidad de disponer de todas las series históricas, en este capítulo se recoge solamente el primer ranking que edita la revista en 2001 con datos del 2000 (**TOP2000**) y se realiza un salto hasta 2010 (**TOP 2009**), con el fin de comparar las cifras de las empresas más representativas.

La constancia en la recogida de datos por los equipos de Gretel Weiss hará que cada año se vaya valorando más la fiabilidad de la información y las conclusiones que dicha analista efectúa de ellas; hasta el punto de que, su presentación en la anual Summit de Zurich, hasta 2023, era esperada con gran interés, dadas las novedades que solía anunciar en materia de tendencias, protagonismo de sectores y empresas, a la luz del análisis del comportamiento de la clientela en los países considerados.

Por ejemplo, incluir en la lista a los grupos de *contract-catering* junto a los de QSR. Ambos serán hegemónicos en el ranking, durante muchos años, debido a la potencia de los líderes en cada sector, encabezados siempre por McDonald's seguido de una rival alternancia entre Sodexho (hoy Sodexo) y Compass Group.

Otra característica destacable será contar no sólo con un incipiente sector (ahora consolidado) como el de travel channel, sino también no soslayar al food retail y sus maniobras (ahora rigurosas) en el foodservice.

En lo que se refiere a empresas españolas, aunque pocas, ya empiezan a aparecer en las listas europeas y su colocación en la parte media baja de la lista irá con el paso del tiempo mejorando gracias al crecimiento, interno y externo, de sus más significados representantes.

En la parte I, se han seleccionado los rankings con cifras del 2000 y 2009 para que sirvan de referencia, con el fin de analizar las cifras de los grupos más representativos; tanto los que son europeos natos, como los que no (los cuales sólo registran cifras correspondientes a su actividad en Europa).

Podrán compararse cifras también del share que supone el QSR, el *contract-catering* y los casuales restaurants como principales segmentos del sector, comprobándose como el primero crece desde un 27% del total en 2000 a un 34,2% en 2009, siendo en este último año las empresas (24) de EEUU las que más ventas registran (22,3%) por delante de las (17) del Reino Unido (20,8%).

En este capítulo aparecen pues los rankings, publicados en la revista, correspondientes a los años citados (con datos del año anterior) bajo los siguientes títulos, siendo precedido por el editorial de WyW y antes de una de las conferencias de Gretel Weiss en la Summit, concretamente, la VIII edición, del año 2007.

Año 2000: The Leaders of the Pack **TOP2000**

Año 2007: Gretel Weiss **EFSS2007top100**

Año 2010: Bigger, Bigger, the Biggest **TOP2009**

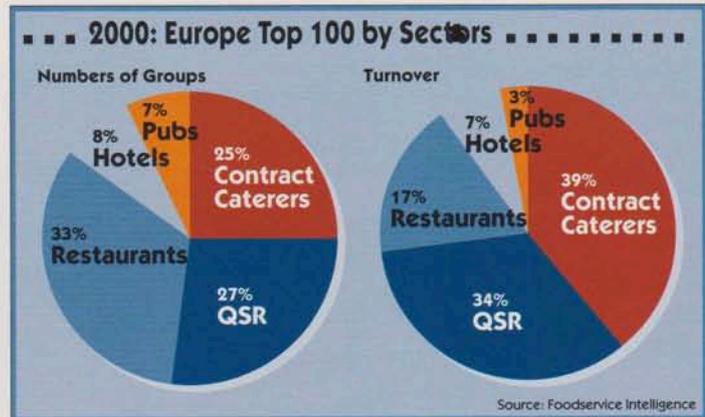
El resto de rankings anuales pueden consultarse accediendo a la hemeroteca: [www.food-service.de](http://www.food-service.de) y a DFV Mediengruppe: [www.dfv-archiv.de](http://www.dfv-archiv.de)

(\*) En la sección The Gallery, se recoge una serie de rankings elaborados por la revista NeoRestoration Magazine, sobre grupos de restauración en Europa, bien en el segmento de restauración comercial, en el de restauración de servicio rápido y en el de restauración colectiva y en los que tuve ocasión de colaborar en su confección. Para los analistas y curiosos, hay cifras y datos que pueden resolver más de una duda.

# The Leaders of the Pack

## RESEARCH

Top 100 Foodservice Groups in Europe: this is the second time that this ranking has been prepared. It shows the dominance of the UK and US brands and companies in the world of chains as well as their multinational activities. Research by Peter Backman and Ian Beston of Foodservice Intelligence, London, UK.



# The Leaders of the Pack

Top 5 by Country of Origin

Country	Group	Turnover (€ m)	Top 5 Turnover
USA	McDonald's	10,057	13,627
	Tricon	1,836	
	Hilton International	827	
	Aramark	750	
	Domino's Pizza	157	
UK	Compass Group (1)	7,763	13,677
	Whitbread	2,180	
	Diageo	1,680	
	Six Continents	1,241	
	Punch Group	813	
France	Sodhexo Alliance	4,553	8,665
	Ellor	1,765	
	Accor	1,412	
	Agapes	486	
	Servair	449	
Germany	LSG	1,055	2,688
	Tank & Rast	495	
	Pedus	443	
	Mitropa	351	
	Nordsee	344	
Italy	Autogrill	1,026	2,406
	Gemeaz Cusin	725	
	Gruppo Onama	243	
	Camst	232	
	Pellegrini	180	
Switzerland	SAir Relations	1,014	2,279
	Migros	465	
	Mövenpick	315	
	SV-Group	309	
	Passaggio	176	
Spain	TelePizza	365	1,216
	Sol Meliá	263	
	Areas	227	
	Grupo Sigla	215	
	El Corte Inglés	146	

Source: Foodservice Intelligence

A major indicator of the foodservice sector is the growing importance of group operators. Increasing size means that a foodservice company can enjoy the benefits of economies of scale in many areas of its activities. For instance, it can afford to recruit the brightest and best managers and offer them exciting career prospects. Size also allows foodservice operators to extend their marketing and brand development opportunities. A third, and very significant, advantage of size is the benefits it brings in terms of driving out costs by minimizing logistical inefficiencies and, fundamentally, by buying food and other supplies at the lowest prices.

For all these reasons, group operators are increasing their importance throughout Europe. Many of them have reached the limits of their growth in a single country and are becoming international. This internationalisation is handled differently by different companies. The American model, for example, is to drive a single brand across as many borders as possible; but many groups prefer to develop specific brands for individual markets – generally defined within a single country.

Given these developments, Foodservice Intelligence have worked for months to create the Top 100 – a listing and ranking of the largest companies active in this growing market – worth over €220 billion in terms of foodservice sales in 2000.

This ground breaking list shows that the Top 100 had a total foodservice turnover in 2000 valued at €56 billion – nearly 24% of the total European market, up from over 21% in 1999.

**Who is leading the way?** Of those groups originating in Europe, those from the United Kingdom represent the largest portion of group operators in the Top 100 list. With a total of 24 groups, four of which are in the Top 10, they are some way ahead of France both in terms of numbers of operators and value of foodservice turnover. UK group operators have a combined foodservice turnover accounting for 31% of the Top 100 total and 38% of the Top 10 total. The 16 group operators originating from France account for 20% of the total foodservice turnover for the Top 100 and 23% of the Top 10. Thereafter Germany, Italy, Switzerland and Spain are most significant with a total of 40 companies in the Top 100. The combined foodservice turnover of these 40 European groups however accounts for only 19% of the Top 100 total and is significantly smaller than the UK. The two US companies in the Top 10 account for 35% of the combined foodservice turnover of the Top 10 groups. The eight US group operators featured in the Top 100 account for 25% of the Top 100 turnover.

The combined turnover of the UK and US groups accounts for a staggering 74% of the Top 10 total foodservice turnover and 56% of the Top 100 total. In order to explain the predominance of UK and US groups in Europe we need to consider which foodservice sectors are strongest in the context of our Top 100 listing.

Foodservice sectors: when the Top 100 group operators in Europe are classified according to their main area of activity, the contract catering sector dominates the list.

# The Leaders of the Pack

RESEARCH

## Europe: Top 100 Foodservice Groups

(classified according to their foodservice turnover in Europe in 2000)

'00 Group	Brands	Turnover (€million)	Sectors	Country of Origin
1. McDonald's#	Aroma, McDonald's	10,057	QSR	USA
2. Compass Group	Café Ritazza, Café Select, Eurest, Medirest, Not Just Donuts, Scolarest, SSP, Upper Crust	7,763 (1)	Contract Caterers, QSR	UK
3. Sodhexo Alliance	Sodhexo Prestige, Sodhexo Remote Site, Sodhexo Catering & Services	4,553	Contract Caterers	France
4. Whitbread	Beefeater, Bella Pasta, Brewer's Fayre, Café Rouge, Churrasco, Costa Coffee, David Lloyd Leisure, Maredo, Marriott, Pizza Hut, Swallows, TGI Friday's, Travel Inn	2,18	Restaurants, QSR, Pubs, Hotels, Leisure	UK
5. Tricon	KFC, Pizza Hut, Taco Bell	1,836	QSR	USA
6. Elior	Avenance, Eliance (Arche, Café Route, Phileas, Pomme de Pain, Station Sandwich)	1,765	Contract Caterers, QSR, Motorway Service Areas, Travel Contract Caterers, Leisure, Restaurants	France
7. Diageo#	Burger King	1,68	QSR	UK
8. Accor	Courtepaille, Formule 1, Gemeaz Cusin, Ibis, Le Nôtre, Novotel	1,412	Hotels, QSR, Restaurants, Contract Caterers	France
9. Six Continents (2) (formerly known as Bass)	Alex, All Bar One, Browns Restaurants, Crowne Plaza, Harvester, Holiday Inn, Inter-Continental, O'Neills, Toby Restaurants, Vintage Inns	1,241	Restaurants, Pubs, Hotels	UK
10. LSG	LSG/SkyChefs	1,055	Travel Contract Caterers	Germany
<b>TOTAL TOP 10</b>		<b>33,542</b>		
11. Autogrill	AutoGrill, Bar Alemagna, Bar Motta, Ciao, Côte France, Spizzico	1,026	QSR	Italy
12. SAir Relations	Gate Gourmet, Gourmet Nova, Rail Gourmet, Restaurama	1,014	Travel Contract Caterers	Switzerland
13. Hilton International	Hilton, Stakis, Scruffy Murphy's, Wacky Warehouse	827	Hotels	USA
14. Punch Group	Alloa Pubs, Big Steak, Goden Inns, Firkin	813	Pubs, Restaurants	UK
15. GIB Group	Crock'In, Quick, Lunch Garden	753	QSR	Belgium
16. Aramark	Aramark	750	Contract Caterers	USA
17. Gemeaz Cusin	Eurocatering, Ticket Restaurant	725	Travel Contract Caterers	Italy
18. Scottish & Newcastle	Carveries, Chef & Brewer, Finnegan's Wake, Henry's Table Homespreads, Lodge Inns, Old Orleans, Whole Hog	654	Pubs, Restaurants, Hotels	UK
19. Tank & Rast	Tank & Rast	495	Motorway Service Areas	Germany
20. Agapes	Amarines, Flunch, Pizza Paï	486	Restaurants	France
<b>TOTAL TOP 20</b>		<b>41,085</b>		
21. Migros	Migros	465	In-store restaurants	Switzerland
22. Nomura	Unique Pub Co (no central purchasing)	453	Pubs	UK
23. Servair	Servair	449	Travel Contract Caterers	France
24. Pedus	Pedus	443	Contract Caterers	Germany
25. Greggs	Greggs	389	QSR	UK
26. Alpha Catering Services	Alpha	371	Travel Contract Caterers	UK
27. TelePizza	TelePizza	365	QSR	Spain
28. City Centre Restaurants	Caffe Uno, Chiquito, Deep Pan Pizza, Frankie & Bennys, Garfunkel's, Wok Wok Wok	357	Restaurants	UK
29. Mitropa	Mitropa	351	Travel Contract Caterers	Germany
30. Nordsee	Nordsee, Meeresbuffet	344	QSR	Germany
31. Sokos Group	Sokos	343	Restaurants	Finland
32. Buffalo Grill	Bistrot D'Augustin, Buffalo Grill, Victoria Pub	334	Restaurants	France
33. Groupe Flo	Bistro Romain, Café Flo, Hippopotamus, Petit Bofinger	332	Restaurants	France
34. Mövenpick	Cindy's Diner, Marché, Mövenpick Restaurants	315	Restaurants, QSR	Switzerland
35. SV-Group	SV-Group	309	Contract Caterers	Switzerland
36. Amica (Fazer Group)	Amica	291	Contract Caterers	Finland
37. Groupe Sogeres	Sogeres	285	Contract Caterers	France
38. Casino Cafeteria	Casino	284	In-store restaurants	France
39. Sol Meliá	Paradisus, Mellá, Tryp	263	Hotels	Spain
40. Pizza Express	Pizza Express	256	Restaurants	UK
41. Karstadt	Karstadt	250	In-store restaurants	Germany
42. Ikea	Ikea	244	In-store restaurants	Sweden
43. Gruppo Onama	Onama	243	Contract Caterers	Italy
44. Groupe Le Duff	La Brioche Doree, Pizza Del Arte	240	Restaurants	France

By strongly focusing on chaining and branding, group operators originating from the UK and the US account for the largest proportion of the European foodservice market, in which contract catering and QSR are the most significant sectors of foodservice activity.

# The Leaders of the Pack

RESEARCH

## Europe: Top 100 Foodservice Groups

(classified according to their foodservice turnover in Europe in 2000)

'00	Group	Brands	Turnover (€million)	Sectors	Country of Origin
45.	Camst	Camst	232	Contract Caterers	Italy
46.	Areas	Areas	227	Motorway Service Areas	Spain
47.	Dinea	Dinea	221	In-store restaurants	Germany
48.	Grupo Sigla	Gino's, Vips	215	Restaurants, QSR	Spain
49.	Goody's	Flocafe, Goody's	191	QSR, Restaurants	Greece
50.	Groupe Holder	Boulangeries Paul, Ladurée	184	QSR	France
<b>TOTAL TOP 50</b>			<b>50,331</b>		
51.	Pellegrini	Pellegrini	180	Contract Caterers	Italy
52.	Passagio	Passagio Café, Passagio Snack	176	Travel Areas	Switzerland
53.	Cremonini	Chef Express	175	QSR	Italy
54.	Euro Disney	Restauration de Disneyland Paris	174	Leisure	France
55.	Albron	Albron	173	Contract Caterers	Netherlands
56.	Narvesen	Caroline Café, Peppes Pizza, Togservice	171	Restaurants, QSR	Norway
57.	Queens Moat Houses	Queens Moat Houses	169	Hotels	UK
58.	Servex	Pizza Hut, Kiosk	163	QSR	Netherlands
59.	Prêt A Manger	Prêt A Manger	162	QSR	UK
60.	Kronenbourg	Adidas Sports Café, Tavernes et comptoirs de Maitre Kanter	160	Pubs, Restaurants	France
61.	Wigast	Wienerwald, Wigast	157	Restaurants	Austria
62.	Domino's Pizza	Domino's Pizza	157	QSR	USA
63.	Thistle Hotels	Thistle Hotels	155	Hotels	UK
64.	Norges Gruppen	Big Horn, Dolly Dimple, Toasty	155	Restaurants, QSR	Norway
65.	Vendex Group	La Place, Cafe Marche, Panini	154	In-store restaurants	Netherlands
66.	Wimpy	Wimpy	150	QSR	UK
67.	El Corte Inglés	El Corte Inglés	146	In-store restaurants	Spain
68.	Coop Suisse	Coop, Pasta Gala, Panofino	144	In-store restaurants	Switzerland
69.	Wolverhampton & Dudley	W & D	142	Pubs	UK
70.	Société du Louvre (3)	Campanile	133	Hotels	France
71.	La Cascina	La Cascina	122	Contract Caterers	Italy
72.	Pansfood	Pans & Company	120	QSR	Spain
73.	Zena	Foster's Hollywood etc.	111	Restaurants	Spain
74.	PJB Holding	Chez Clement	111	Restaurants	France
75.	Stockheim	Stockheim	109	Restaurants, QSR	Germany
76.	Trivalor (Gertal Itau)	Trivalor	105	Contract Caterers	Portugal
77.	Greene King	Hungry Horse, Morland, Old Speckled Hen	105	Pubs	UK
78.	Enterprise Inns	Enterprise Inns	103	Pubs	UK
79.	Initial Catering Services	Initial	101	Contract Caterers	UK
80.	Cooperativa Italiana di Ristorazione	Cooperativa Italiana di Ristorazione	100	Contract Caterers	Italy
<b>TOTAL TOP 80</b>			<b>54,614</b>		
81.	Pubmaster	Pubmaster	98	Pubs	UK
82.	Groupe Score	Score	93	Contract Caterers	France
83.	DSR	DSR	83	Contract Caterers	Switzerland
84.	Kuffler Group	Kuffler	80	Restaurants	Germany
85.	Starbucks	Starbucks	75	QSR	USA
86.	Grupo Restmon	Cantina Mariachi, Rock & Ribs	75	Restaurants	Spain
87.	Bocatta	Bocatta, Pokins	75	QSR	Spain
88.	Feinkost Käfer	Käfer	74	Restaurants	Germany
89.	Perfect Pizza	Perfect Pizza	74	QSR	UK
90.	Block House	Block House, Elysee	74	Restaurants	Germany
91.	Conran Restaurants	Bluebird, Quaglinos', etc.	73	Restaurants	UK
92.	Manor	Manora	68	In-store restaurants	Switzerland
93.	Candrian	Bahnhof Buffet	63	Restaurants, QSR	Switzerland
94.	Bindella	Bindella, Santa Lucia, Contrapunto	62	Restaurants	Switzerland
95.	Belgo Group	Beirodrome, The Ivy	61	Restaurants	UK
96.	Italjolly	Jolly Hotels Classic, Jolly Hotels Master	60	Hotels	Italy
97.	Kochlöffel	Kochlöffel	57	QSR	Germany
98.	Group Chez Gerard	Livebait, Signiture, Richoux	56	Restaurants	UK
99.	Subway	Subway	54	QSR	USA
100.	Do & Co	Do & Co	53	Travel Contract Caterers, Restaurants	Austria
<b>TOTAL TOP 100</b>			<b>56,022</b>		

1) Compass Group published results for financial year 2000 including Granada restaurants and hotels.  
2) Bass changed its name to Six Continents on 1 August 2001. 3) Entered in 1999 as Envergure.

Source: Foodservice Intelligence.

Foodservice Intelligence estimates that the foodservice turnover of the Top 100 accounts for around 24% of the European market (measured in terms of food sales) – of this the UK and US operators in the list account for nearly 14%.



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Company \_\_\_\_\_

Name (Mr | Mrs) \_\_\_\_\_

First Name \_\_\_\_\_

Address \_\_\_\_\_

City | Code \_\_\_\_\_

Country \_\_\_\_\_

Phone \_\_\_\_\_

MGH, Bürgerweide, 28209 Bremen, Germany  
Phone +49 (0) 421-3505-260  
Fax +49 (0) 421-3505-681  
E-Mail [info@fishinternational.de](mailto:info@fishinternational.de)  
Internet [www.fishinternational.com](http://www.fishinternational.com)

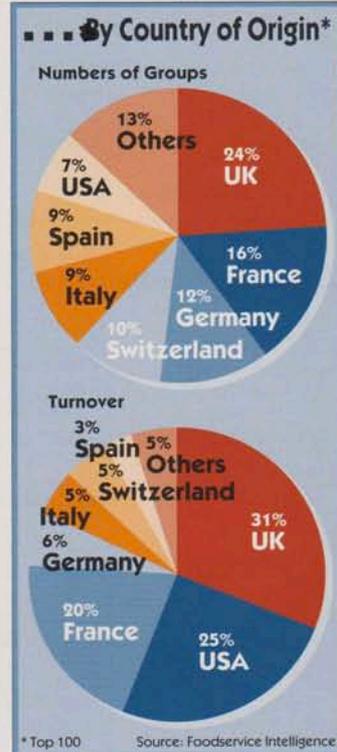
**MGH** MESSE- UND AUSSTELLUNGSGESELLSCHAFT HANSA GMBH

The combined foodservice turnover of contract caterers represents 39% of the Top 100 total. The QSR sector follows second (34%). Group operators in these two sectors account for 73% of the European foodservice turnover of the Top 100.

To summarise, group operators originating from the UK and US account for the largest proportion of the European foodservice market, in which contract catering and QSR are the most significant sectors of foodservice activity. This is largely a result of the UK following developments in the US, where group operators focus on chaining and branding. With chaining and branding concepts particularly prevalent in the QSR and contract catering sectors, these have been the first two areas of activity which have been most marketable across national boundaries.

We estimate that the foodservice turnover of the Top 100 accounts for around 24% of the European market (measured in terms of food sales) and of this the UK and US group operators featured in our list account for nearly 14%. With this in mind, our Top 100 table clearly shows the advances other European group operators will have to make if they are to challenge the leading groups from the UK and the US for a larger share of the European foodservices market.

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### Notes for Top 100

This is the second year that this list has been prepared, however this is the first year that this list has been extended from 80 to the top 100. Consequently there may be companies in different countries we have missed. To identify companies for inclusion we assessed information from various sources (company sources, industry reports, Internet etc.) and made assumptions regarding their foodservice turnover. As a result in many cases the figures presented are Foodservice Intelligence estimates. We would welcome all comments, whether your company is one we have included or one you believe should be included.

1. Turnover is based on 2000 information, converted into Euros at average annual 2000 exchange rates.
2. Turnover calculations are based on company performance and activities reported for Financial Year 2000.
3. Turnover figures only cover food (and associated drink sales). They exclude income generated outside Europe, sales taxes, accommodation, retail sales and other income.
4. Space restrictions mean only some brands operated by multi-brand companies can be listed.
5. We have tried to remove double counting. This has not always been possible (e.g. where a group operates a franchise from another company in the list). Systemwide sales are shown with a (#).

8th EFSS

## Europe & Foodservice

- ✕ top 111 restaurant companies
- ✕ spotlights on products & trends



Gretel Weiss, FoodService Europe & Middle East  
Frederike Barkhausen & Philipp Laqué, presentation

8th EFSS

## Consumer Mega Trends

 Time

 Health

 Trust

 Emotion

Source: Bratschi/Feldmann



## The Leaders of the Pack

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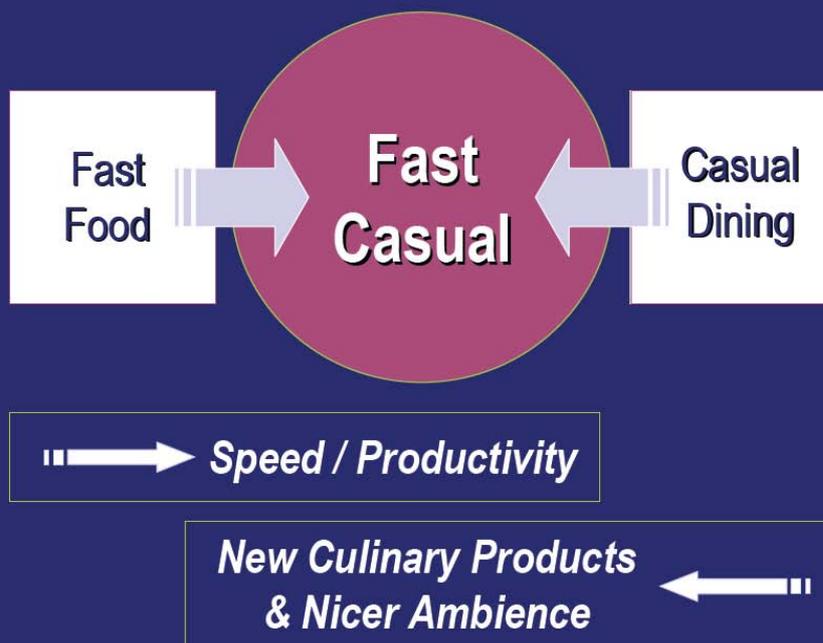
# Subway / Starbucks Comparison

Subway	Aspect	Starbucks
Fresh Fast Food	1 USP	Lifestyle, 3rd Place
Private	2 Company	Public
Σ Small Businesses	3 Acting	Large Corporation
Decentralised	4 Focus	Centralised
Local Franchisees (Development Agent)	5 Expansion	Joint-Ventures Country by Country
Small Investments (each)	6 Finance	Long-term Investment
Operations Driven	7 Energy	Brand Driven
Little	8 Publicity	Lots



8th EFSS

# Convergency



# Chapter 1

## Top 111 Restaurant Companies



## Rules: 2006 Top 111

- ✘ figures as reported, otherwise estimated
- ✘ ranked by corporations, not brands
- ✘ categorised by main business field
- ✘ system sales include franchise activity
- ✘ UK pubs: managed houses only
- ✘ hotels (if estimated):
  - 1-3 ★ - 20% F&B share
  - 4-5 ★ - 30% F&B share
- ✘ use of constant currencies (€ conversion)
- ✘ overlapping activities are disregarded



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# Top 111 Operators

in Europe:

- ✘ €75 bn turnover in 2006 (+ 5.8%)  
2005 (+ 5.2%)  
2004 (+ 4.8%)
- ✘ 18 countries of origin
- ✘ over €330 bn Europe's total



8th EFSS

# Top 10 Groups in Europe

R.	Group	No. of C.	Origin	Sales € m	vs. '05
1	McDonald's	37	USA	12,719	7.0%
2	Compass Group	29	UK	7,072	0.2%
3	Sodexho Alliance	29	France	5,518	5.6%
4	Elior	8	France	3,002	6.4%
5	Mitchells & Butlers	2	UK	2,524	5.5%
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7	Burger King*	15	USA	1,980	6.5%
8	Accor*	28	France	1,583	4.8%
9	LSG	20	GER	1,367	-0.7%
10	Aramark*	7	UK	1,288	9.0%
	<b>Total</b>			<b>39,553</b>	<b>5.2%</b>

\*estimated

Source: FoodService Europe & Middle East / Horizons



## The Leaders of the Pack

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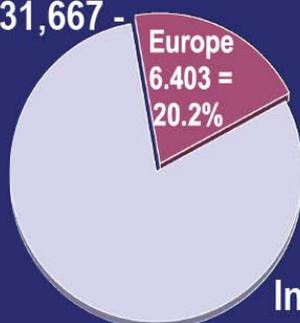
## The Leaders of the Pack

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# McDonald's 2006

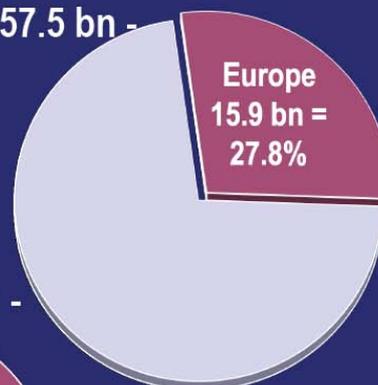
- Restaurants

Worldwide 31,667 -

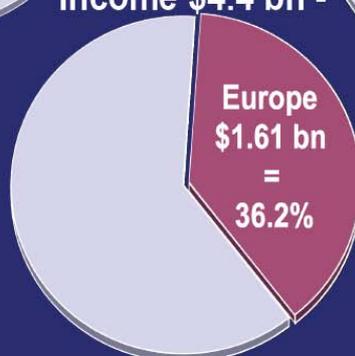


- Sales Worldwide

\$57.5 bn -



- Operating Income \$4.4 bn -



Source: FoodService Europe & Middle East

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<b>Total</b>				<b>39,553</b>	<b>5.2%</b>



\*estimated

Source: FoodService Europe & Middle East / Horizons

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# 2006: Most Distributed Groups

## Country Markets in Europe



\*estimated

Source: FoodService Europe & Middle East / Horizons

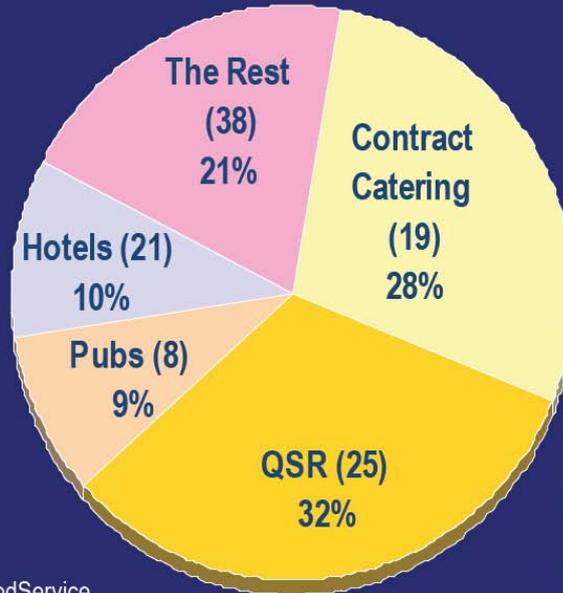


# The Leaders of the Pack

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## Which Sectors ?

- Europe 2006: Share of Top 111 Sales -



The Rest:

Restaurants	9%
Travel	8%
In-Store	4%

( ) = no. of companies

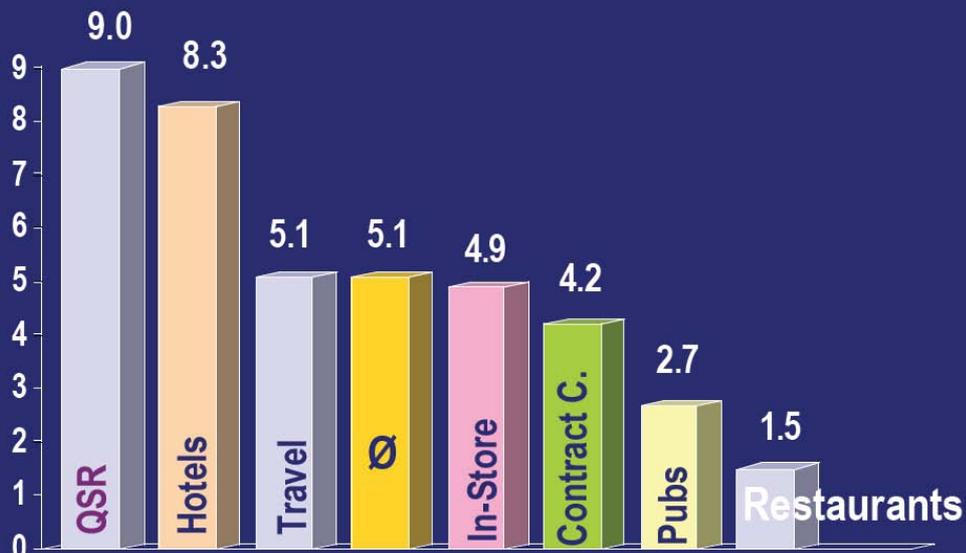
Source: FoodService Europe & Middle East / Horizons



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## Sectors with

fastest % Growth 2006 vs. 2005



Source: FoodService Europe & Middle East / Horizons

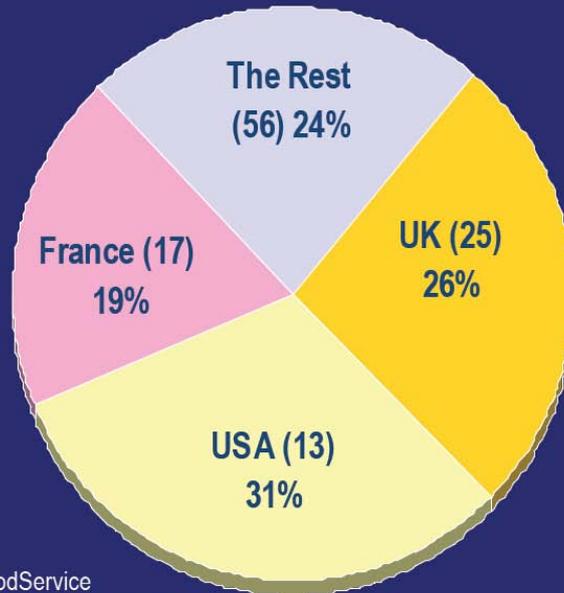


# The Leaders of the Pack

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## Which Countries of Origin?

- Europe 2006: Share of Top 111 Sales -



The Rest:

Germany	6%
Italy	4%
Switzerland	3%
Spain	3%
Others	8%

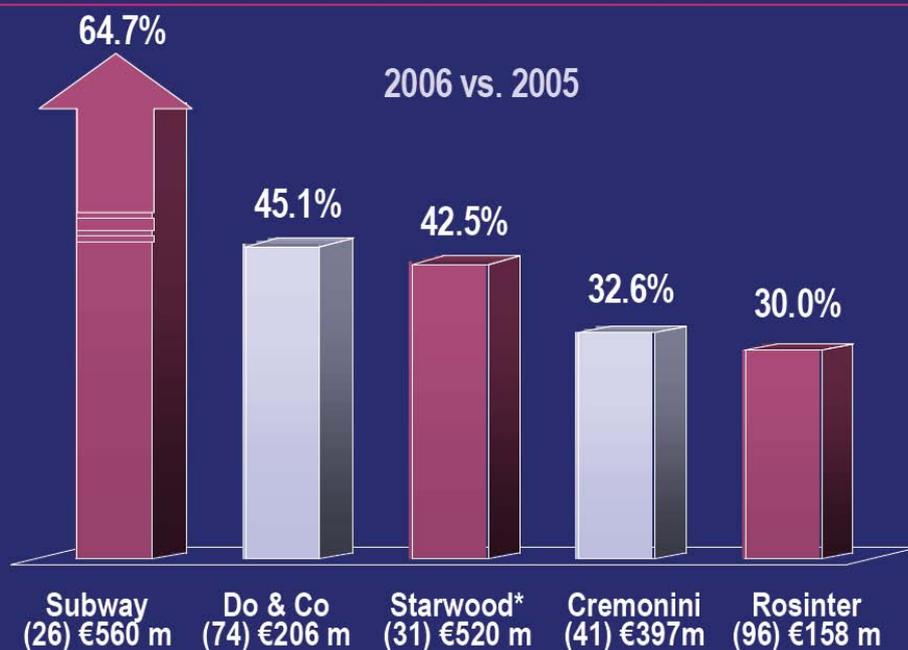
Source: FoodService  
Europe & Middle East / Horizons

( ) = no. of companies



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## 2006: Top 1- 5 by % Growth



\*estimated

(rank in top 111) foodservice turnover in Europe

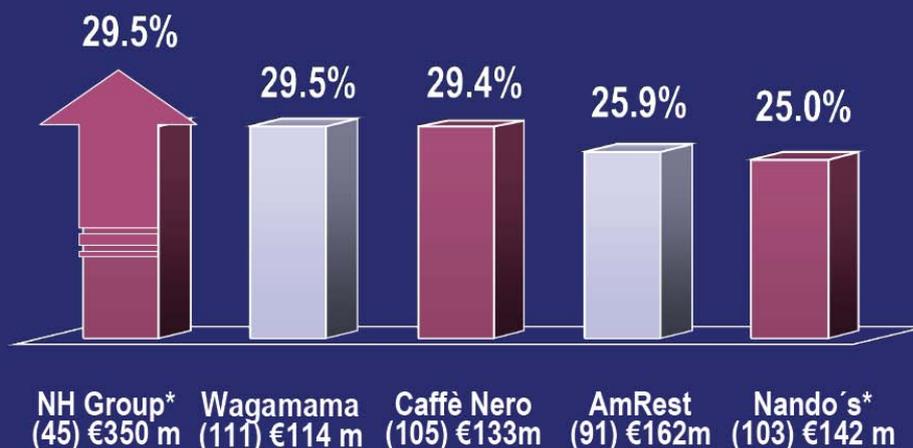


## The Leaders of the Pack

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# 2006: Top 6 - 10 by % Growth

2006 vs. 2005



\*estimated

(rank in top 111) foodservice turnover in Europe

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# E. '06: Top 10 by absolute Growth

R.	(111)	Group	Sector	Country	Growth € m
1	(1)	McDonald's	QSR	USA	832
2	(3)	Sodexo	CC	France	294
3	(6)	Yum! Brands *	QSR	USA	221
4	(26)	Subway	QSR	USA	220
5	(4)	Elior	CC	France	180
6	(31)	Starwood *	Hotels	USA	155
7	(5)	Mitchells & Butlers	Pubs	UK	131
8	(7)	Burger King *	QSR	USA	120
9	(10)	Aramark *	CC	USA	106
10	(25)	Starbucks *	QSR	USA	103
		<b>Total</b>			<b>2,362</b>



\*estimated

Source: FoodService Europe & Middle East / Horizons

8th EFSS

## Segment Analysis

- ✗ the top players
  - ✗ the top trends
  - ✗ the top challenges
- ➔ the drivers of development?



8th EFSS

## 2006: QSR Segment

- ✗ Groups: 25 out of 111
  - ✗ Origin: 6 x USA, 5 x UK, 3 x France
  - ✗ New: AmRest, Wagamama
- 
- ✗ Sales: € 24 bn (out of 75 bn)
  - ✗ Growth: + 9% (05: +5.6%)



## The Leaders of the Pack

8th EFSS

# 2006: Top 10 QSR

R.	(111)	Group	Origin	Sales € m	vs. '05
1	(1)	McDonald's	USA	12,719	7.0%
2	(6)	Yum! Brands*	USA	2,500	9.7%
3	(7)	Burger King*	USA	1,980	6.5%
4	(19)	Greggs	UK	808	3.3%
5	(20)	Quick	Belg.	807	6.1%
6	(25)	Starbucks*	USA	590	21.0%
7	(26)	Subway	USA	560	64.7%
8	(27)	Domino's*	USA	550	19.6%
9	(37)	TelePizza*	Spain	440	10.3%
10	(42)	Nordsee	GER	370	3.6%
		<b>Total</b>		<b>21,324</b>	<b>8.7%</b>

\*estimated

Source: FoodService Europe & Middle East / Horizons



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# QSR: Top 6 in Growth

R.	(111)	Group	Origin	Sales € m	vs. '05
1	(26)	Subway	USA	560	64.7%
2	(111)	Wagamama	UK	114	29.5%
3	(105)	Caffè Nero Grp.	UK	133	29.4%
4	(91)	AmRest	PL	162	25.9%
5	(103)	Nando's*	S Africa	142	25.0%
6	(25)	Starbucks*	USA	590	21.0%

\*estimated

Source: FoodService Europe & Middle East / Horizons



## The Leaders of the Pack

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\*estimated

Source: FoodService Europe & Middle East / Horizons



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## McDonald's

- ✗ the leader of the pack is back on track
- ✗ the magic word is upgrading
- ✗ not exactly trendy but riding the lifestyle wave



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## McD's Europe

- 3 core strategies:
- ✗ brand transparency
  - ✗ better customer & employee experience
  - ✗ more local relevance



## The Leaders of the Pack

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# McCafé Germany

Number of Stores



8th EFSS

# McCafé Europe

R.	Country	1 / 05	1 / 06	8 / 07
1	<b>Germany</b>	7	58	300
2	Portugal*	105	105	105
3	Italy		6	48
4	Russia	7	19	32
5	Hungary	5	8	20
6	Austria	2	2	12
7	France		3	10
8	UK	7	7	7
9	Spain	4	4	6
10	Ireland	4	4	4
11	Sweden	-	-	1
	<b>Europe total</b>	138	213	545

\*not full standard



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## QSR: Upgrading Influence

### 3 young segments

- ✕ fast casual
- ✕ coffee shops
- ✕ bakery cafés



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## Success Formula 2007

<b>Key Factor</b>	<b>Fresh</b>	<b>Quick</b>	<b>Attractive</b>
<b>Dimension</b>	<b>Food</b>	<b>Time</b>	<b>Lifestyle</b>



*quick & easy to enjoy*

8th EFSS

## Fast Casual Influence

- ✗ classical fast food has to get upgraded
- ✗ otherwise the consumer will downgrade it



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## Caffè Latte & Co

- The premium offer
- ✗ little difference in high price point concepts
  - ✗ big difference in the lower price point world
- ➔ additional frequency for QSR



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## Qualified Coffee Breaks

- ✗ it's not the drink
- ✗ it's not the food
- ✗ it's the little luxury



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## Qualified Coffee Breaks

- ✗ mentally –  
I am buying a break  
by  
paying for Caffè Latte & Co
- ✗ it's an escape from a demanding city life



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## Bakery Snacks/Meals

Because of quick service

- ✘ baking is getting equal to cooking in the away-from-home-market
- ✘ bakery products are perfect for modern life on the run



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## Vertically Integrated Brands

- ✘ formerly beer pubs
  - ✘ today coffee bars and pasta bars
- ➔ benchmark fashion industry



## The Leaders of the Pack

8th EFSS

# 2006: Contract Catering Segment

- ✕ Groups: 19 out of 111
- ✕ Origin: 4 x France, Germany
- ✕ Sales: € 21 bn
- ✕ Growth: + 4.2% (05: + 5.0%)



8th EFSS

# Top 5 in Growth: Contract Catering

R.	(111)	Group	Origin	Sales € m	vs. '05
1	(83)	Groupe Score	France	180	20.4%
2	(95)	Groupe API	France	160	18.0%
3	(84)	BaxterStorey	UK	176	16.5%
4	(80)	Klueh	GER	191	11.9%
5	(44)	Dussmann	GER	357	9.2%

Source: FoodService Europe & Middle East / Horizons



## The Leaders of the Pack

8th EFSS

# 2006: Top 10 Contract Catering

R.	(111)	Group	Origin	Sales € m	vs. '05
1	(2)	Compass	UK	7,072	0.2%
2	(3)	Sodexho	France	5,518	5.6%
3	(4)	Elior	France	3,002	6.4%
4	(10)	Aramark *	USA	1,288	9.0%
5	(23)	Camst	Italy	700	7.2%
6	(33)	Fazer Amica	Finland	513	3.4%
7	(44)	Dussmann	GER	357	9.2%
8	(47)	SV Group	CH	347	2.2%
9	(53)	CIR Food	Italy	300	7.3%
10	(55)	Pellegrini	Italy	282	8.1%
		<b>Total</b>		<b>19,378</b>	<b>3.9%</b>

\*estimated

Source: FoodService Europe & Middle East / Horizons



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## Contract Catering

- ✗ captive markets
- ✗ large operations
- ✗ high concentration on lunch
- ✗ on contract level very competitive



## The Leaders of the Pack

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# B&I

- ✗ canteens have to become restaurants
- ✗ systems and branding are needed
- ✗ cost-driven
- ✗ new markets, new energy



8th EFSS

## 2006: F&B in Hotel Segment

- ✗ Groups: 21 out of 111
- ✗ Origin: 6 x USA, 5 x Germany, 3 x Netherlands, Spain
- ✗ Sales: € 7.826 bn
- ✗ Growth: + 8.3% (05: + 4.2%)



## The Leaders of the Pack

8th EFSS

### Top 5 in Growth: Hotels

R.	(111)	Group	Origin	Sales € m	vs. '05
1	(31)	Starwood *	USA	520	42.5%
2	(45)	NH Group *	Spain	350	29.5%
3	(78)	Hyatt *	USA	195	14.3%
4	(88)	Maritim	GER	167	10.0%
5	(36)	Rezidor SAS *	Belg.	460	10.0%



\*estimated

Source: FoodService Europe & Middle East / Horizons

8th EFSS

### 2006: Top 10 Hotels

R.	(111)	Group	Origin	Sales € m	vs. '05
1	(8)	Accor *	France	1,583	4.8%
2	(15)	Hilton	USA	1,002	9.3%
3	(17)	Best Western *	USA	890	7.9%
4	(30)	Marriott *	USA	520	4.0%
5	(31)	Starwood *	USA	520	42.5%
6	(36)	Rezidor SAS *	Belg.	460	10.0%
7	(45)	NH Group *	Spain	350	29.5%
8	(60)	InterContinental	UK	254	-5.6%
9	(69)	Van der Valk *	NL	210	2.9%
10	(73)	Sol Meliá	Spain	207	4.0%
		<b>Total</b>		<b>5,996</b>	<b>9.4%</b>



\*estimated

Source: FoodService Europe & Middle East / Horizons

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## Hotels: Main Trends

- ✗ more properties
- ✗ more branding
- ✗ more internet-generated business
- ✗ more event catering



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## 2006: Pub Segment

- ✗ Groups: 8
- ✗ Origin: all UK
- ✗ Sales: € 7.050 bn
- ✗ Growth: + 2.7% (05: + 7.9%)



## The Leaders of the Pack

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### 2006: Top 8 Pubs\*

R.	(111)	Group	Origin	Sales € m	vs. '05
1	(5)	Mitchells & Butlers	UK	2,524	5.5%
2	(11)	Wetherspoon	UK	1,243	4.6%
3	(13)	Punch Taverns	UK	1,090	-16.9%
4	(21)	Greene King	UK	801	5.7%
5	(32)	Laurel Pub Company	UK	514	21.1%
6	(34)	Marston's	UK	485	4.2%
7	(72)	Fuller, Smith & Turner	UK	207	22.8%
8	(81)	Barracuda	UK	186	16.8%
		<b>Total</b>		<b>7,050</b>	<b>2.7%</b>

Source: FoodService Europe & Middle East / Horizons

\*managed estates only



8th EFSS

### Top 5 in Growth: Pubs\*

R.	(111)	Group	Origin	Sales € m	vs. '05
1	(72)	Fuller, Smith & Turner	UK	207	22.8%
2	(32)	Laurel Pub Company	UK	514	21.1%
3	(81)	Barracuda	UK	186	16.8%
4	(21)	Greene King	UK	801	5.7%
5	(5)	Mitchells & Butlers	UK	2,524	5.5%

Source: FoodService Europe & Middle East / Horizons

\*managed estates only



## The Leaders of the Pack

8th EFSS

# 2006: Travel Segment

- ✕ Groups: 10 out of 111
- ✕ Origin: 3 x Germany, 2 x UK, Italy
- ✕ Sales: € 5.974 bn
- ✕ Growth: + 5.1% (05: + 2.7%)



8th EFSS

# 2006: Top 10 Travel

R.	(111)	Group	Origin	Sales € m	vs. '05
1	(9)	LSG	GER	1,367	-0.7%
2	(12)	Autogrill / HMSHost	Italy	1,109	7.9%
3	(14)	SSP	UK	1,030	6.0%
4	(18)	Gate Gourmet	CH	813	-3.5%
5	(28)	Tank & Rast *	GER	550	4.8%
6	(41)	Cremonini	Italy	397	32.6%
7	(65)	Servair *	France	225	0.0%
8	(74)	Do & Co	Austria	206	45.1%
9	(100)	DB Gastronomie	GER	152	0.7%
10	(108)	Welcome Break *	UK	124	4.4%
		<b>Total</b>		<b>5,974</b>	<b>5.1%</b>

\*estimated

Source: FoodService Europe & Middle East / Horizons



8th EFSS

## Travel: Large Players

Having both in the portfolio:

- ✗ own brands
- ✗ franchise brands

➔ to run as many units as possible at one location



8th EFSS

## Top 5 in Growth: Travel

R.	(111)	Group	Origin	Sales € m	vs. '05
1	(74)	Do & Co	Austria	206	45.1%
2	(41)	Cremonini	Italy	397	32.6%
3	(12)	Autogrill / HMSHost	Italy	1,109	7.9%
4	(14)	SSP	UK	1,030	6.0%
5	(28)	Tank & Rast *	GER	550	4.8%

\*estimated

Source: FoodService Europe & Middle East / Horizons



8th EFSS

## Russian Railways

- ✘ more than 1.4 m employees
- ✘ 250,000 meals per day
- ✘ traditional cooking in on-board kitchens of the trains



8th EFSS

## 2006: Restaurant Segment

- ✘ Groups: 19
- ✘ Origin: 6 x France, 5 x UK (no. US!)
- ✘ Sales: € 6.440 bn
- ✘ Growth: + 1.5% (05: + 6.4%)



## The Leaders of the Pack

8th EFSS

# 2006: Top 10 Restaurants

R.	(111)	Group	Origin	Sales € m	vs. '05
1	(16)	Whitbread	UK	897	-27.0%
2	(22)	Agapes	France	731	4.9%
3	(29)	SOK	FL	537	18.5%
4	(35)	The Restaurant	UK	462	4.1%
5	(38)	Buffalo Grill *	France	430	9.4%
6	(40)	Grupo Vips	Spain	407	14.0%
7	(43)	Zena	Spain	370	5.7%
8	(46)	Groupe Flo	France	349	12.3%
9	(49)	Pizza Express *	UK	340	6.7%
10	(52)	Moevenpick	CH	305	4.3%
		<b>Total</b>		<b>4,827</b>	<b>-0.3%</b>

\*estimated

Source: FoodService Europe & Middle East / Horizons



8th EFSS

# Top 5 in Growth: Restaurants

R.	(111)	Group	Origin	Sales € m	vs. '05
1	(96)	Rosinter	Russia	158	30.0%
2	(29)	SOK	Finland	537	18.5%
3	(97)	Restel	Finland	157	17.5%
4	(107)	NorgesGruppen*	Norway	128	15.0%
5	(40)	Grupo Vips	Spain	407	14.0%

\*estimated

Source: FoodService Europe & Middle East / Horizons



8th EFSS

## Full Service-Restaurants

- ✗ smaller corporations
- ✗ less travelled brands
- ✗ more challenges in crossing borders
- ✗ mainly multi-concept operators



8th EFSS

## Full Service-Restaurants

### Full service-restaurants

- ✗ made by main meals
- ✗ made by going out for dinner
- ✗ made by culinary performance

most competition  
with Mom & Pop-businesses

challenge: singles and seniors



## The Leaders of the Pack

8th EFSS

# 2006: In-Store Segment

- ✕ Groups: 9
- ✕ Origin: 2 x Switzerland, Germany
- ✕ New: Marks & Spencer
  
- ✕ Sales: € 2.756 bn
- ✕ Growth: + 4.9% (05: + 3.5 %)



8th EFSS

# 2006: Top 9 In-Store

R.	(111)	Group	Origin	Sales € m	vs. '05
1	(24)	Ikea	SWE	598	13.5%
2	(39)	Migros	CH	420	-4.1%
3	(48)	Metro *	GER	347	2.0%
4	(51)	Groupe Casino	France	314	1.3%
5	(58)	Maxeda	NL	261	7.0%
6	(62)	Marks & Spencer*	UK	240	9.1%
7	(68)	El Corte Ingles *	Spain	218	11.9%
8	(70)	KarstadtQuelle	GER	209	0.4%
9	(101)	Coop Suisse	CH	148	1.8%
		<b>Total</b>		<b>2,754</b>	<b>4.9%</b>

\*estimated

Source: FoodService Europe & Middle East / Horizons



## The Leaders of the Pack

8th EFSS

# Top 5 in Growth: In-Store

R.	(111)	Group	Origin	Sales € m	vs. '05
1	(24)	Ikea	SWE	598	13.5%
2	(68)	El Corte Ingles *	Spain	218	11.9%
3	(62)	Marks & Spencer *	UK	240	9.1%
4	(58)	Maxeda	NL	261	7.0%
5	(48)	Metro *	GER	347	2.0%

\*estimated

Source: FoodService Europe & Middle East / Horizons



8th EFSS

# In-Store Restaurants

Dominated by

- ✗ self service concepts
- ✗ female customers
- ✗ elderly people



## Chapter 2

# Selected Trends



## Change in Society

### A few buzz-words:

- ✗ new work
- ✗ more grey hairs than kids
- ✗ hunger for health
- ✗ seeing myself very individual
  
- ✗ globalisation



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## Bold Flavours

Fundamental shift

- ✗ from rich, creamy & heavy
- ✗ to big bold flavours



8th EFSS

## Bold Flavours

- ✗ people are not asking for a lot of food
  - ✗ they are asking for a lot of flavour
- ➔ striking taste profiles are becoming a must



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## Ethnic Influence

- ✗ Asia is staying very hot
- ✗ it's not the authentic foreign food
- ✗ it's the inspiration coming from other culinary worlds



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## East & West

- ✗ food from the east:
  - success based on health, tradition, speed and transparency
- ✗ similar position:
  - Thailand in Asian & Italy in Europe
- ✗ both regions:
  - world champions in exporting their food culture
  - freshness is the key in food perception



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## Updated Tradition

- ✘ new twists
- ✘ well-known dishes in an updated format
- ✘ if you are able to make tradition trendy, you are a star – financially



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## Back Packs

From an  
old-fashioned utensil  
to a worldwide  
lifestyle bestseller



8th EFSS

## Updated Tradition

- ✘ intelligent modernised dishes are mega in
  - ✘ new local food is fresher, lighter and better looking
- ➔ memories, retro trend



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## Healthful Options

- ✘ need for healthful choices
- ✘ mainly a question of perception
- ✘ it's not just calories or just fat, it's the whole picture



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## Green Style

### Green is the new black!

- ✗ organic food & sustainability
- ✗ focus on regions
- ✗ consumer meets farmer
- ✗ think global – act local

➔ restaurants are not early movers



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## New Beverages

### Example smoothie

- ✗ fruits & berries to drink
- ✗ a liquid snack - standing for itself
- ✗ both in one: F&B
- ✗ healthful with additional values
- ✗ colourful, natural, low or no alcohol
- ✗ packaged for travelling



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## Lifestyle

- ✗ lifestyle-aspects are becoming the road to success
- ✗ it's the language of a menu, of the interior, of an event
- ✗ people are asking for showrooms to express their individual life



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## Singles & Seniors

- ✗ single / senior eaters are a huge growth potential
- ✗ big difference between QSR and Full Service in feeling comfortable

➔ communal tables – family feeling



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## Public Space

- ✘ move from intimate private to public areas
  - ✘ new families: work, leisure etc.
  - ✘ not going out
    - being out most of the time
  - ✘ foodservice happening in public space
- ➔ future path for the hospitality industry



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## Final Thoughts

Restaurants  
- are social platforms,  
home away from home!



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## Final Thoughts

In mindset and spending habits

- culinary enrichment
- guilt free consumption
- lifestyle experience

have taken center stage!



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## Final Thoughts

The truth lies  
in the eye of your guests!

Everything is about perception!



# Big, Bigger, the Biggest in Europe

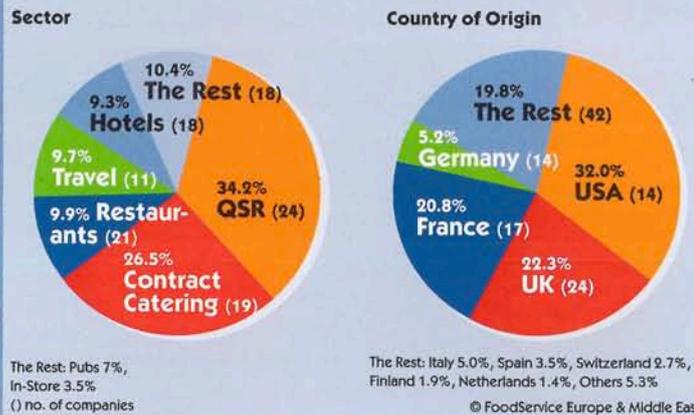
## MARKET RESEARCH

### Top 10 in Europe\*

R	Group	Turnover in €m
1	McDonald's	15,314
2	Sodexo	6,651
3	Compass Group	5,905
4	Elior	3,561
5	Yum! Rest. Int.	2,597
6	Burger King**	2,200
7	Mitchells & Butlers	2,199
8	Autogrill / HMSHost	2,089
9	Accor**	1,623
10	SSP	1,533
	<b>Total</b>	<b>43,672</b>

\* Foodservice sales \*\* estimated  
© FoodService Europe & Middle East

### Turnover 2009: Top 111 Europe



# Big, Bigger, the Biggest in Europe

Europe's Top 111 foodservice operators rang up combined sales of nearly €84 bn in 2009. These 111 companies are based in 18 countries and they operate in practically all nations across the continent. The leaders achieved growth of 1.7% (in constant currency), the smallest figure since this list was first published at the beginning of this decade (best in 2007: more than 8% growth). Two sectors are dominant – quickservice and contract catering, 3 sectors show declining sales (hotels, travel & in-store). The research was carried out by Gretel Weiss and Simone Straubinger (FoodService Europe & Middle East) with additional information on the UK provided by Mark Stretton (M&C Report).

The 111 largest foodservice operations in Europe grew at a combined rate of 1.7% in 2009 ('08: 6.0%; '07: 8.3%; '06: 5.8%). Their sales currently account for more than 20% of total market value in Europe – which is, by the way, a small number compared to the concentration in many other product- and service-industries. Because of very fragmented structures in most countries.

All over Europe trade environments were not good or even bad. Especially in Russia and Spain. However, for many countries we have to say that private consumption stayed quite stable. Why? Especially visits in quickservice restaurants are an established part of our daily life. The picture looks different for corporate spendings in

the hospitality industry – they dropped dramatically.

Without any doubt, hotel F&B was most affected by the worldwide down-turn – especially in the 4 and 5 star chain category. Also we are talking about the very biggest players in Europe. No less than 37 out of the Top 111 make their money in just one country. And it has to be mentioned that 16 out of these 37 are British players with a more profitable cost structure than on the continent – especially in the field of beverage driven concepts.

It's the truth, going multi-national is a very demanding business. It's not only the investment, you also need a clear strategy, management power and partners. And you need patience and time to adapt.

## Important

The list covers foodservice outlets of all kinds from QSR, fullservice restaurants, contract catering and hotels to any other type of outlet where food is served away from home. It does not, however, include military institutions, self-management and places that act primarily as retailers, such as filling stations. As usual, we have taken great care to exclude non-foodservice activities, such as accommodation, from our ranking.

The figures are based mainly on annual reports and information supplied by the companies on request: estimates are marked accordingly.

The ranking makes no claim to be complete – the challenge is to provide an overview of the continent as a whole.

Again, 2009 was characterised by enormous currency fluctuations. A stronger American Dollar against the Euro – on the average 5.2%. But, the British pound lost nearly 11% – compared to 2008. This means, for example, that £100 m were €146 m in 2007, €126 m in 2008, but only €111 m in 2009. Thus, despite the same turnover in pounds, British companies have fallen to much lower ranks in a Euro-based ranking.

To eliminate disadvantage as far as possible from our list, growth rates from companies based and reporting outside of the Euro-zone are shown in constant-currency terms. Otherwise, you would mainly see the monetary ups and downs – but we want to watch operating performances.

Multi-national players such as Compass and McDonald's provided growth data based on both current exchange rates and constant currency, which makes it easier for international rankings. However, companies selling and/or reporting outside the

# Big, Bigger, the Biggest in Europe

## MARKET RESEARCH

### Europe 2009: Top 111 Foodservice Groups

(classified according to their foodservice turnover without VAT in Europe in the year 2009 - gastronomy, contract catering, F&B in hotels)

R. (08)	Group	Main Brands	Main Sector	Turnover '09 (€m)	vs. '08	Country of Origin	EC	Notes
1	(1) McDonald's	McDonald's, McCafé	QSR	15,314	7.0%	USA	37	As reported: system-wide sales in Europe \$21,293 m, +7% increase in 'constant currency'. 6,785 units (+157). Total world wide: \$72,387 m sales, 32,748 units in 117 countries.
2	(3) Sodexo	Sodexo	Contract C.	6,651	7.2%	France	99	Total sales: €14.7 bn/+7.9% (operating profit €746 m). European share: continental 36.5%, UK/Ireland 8.8%. Total employees: 380,000; 33,900 sites in 80 countries. Acquisition of Groupe Score.
3	(2) Compass Group	Eurest, Scolarest, Medirest, etc.	Contract C.	5,905	-1.8%	UK	23	€13,444 m total turnover +17.5% reported (+1.3% in constant currency). Europe: -1.8% in constant currency - continental €3,429 m, UK & Ireland €1,829 m.
4	(4) Ellor	Avenance, Arpège, Serunió, Areas etc.	Contract C.	3,561	3.0%	France	9	14,500 outlets. 69,000 employees. Sales: 67.3% contract catering & co., 32.7% concession & travel. 58% France, 42% international (incl. Latin America). Operating profit €173 m (-5.5%).
5	(5) Yumi Rest. Int.	KFC, Pizza Hut, Taco Bell	QSR	2,597	6.5%	USA	32	Worldwide system-sales in 2009 \$35.5 bn (+1% in constant currency). 37,080 units (+2.2%). Europe: 2,906 (+1.8%) units - 1,338 Pizza Hut, 1,547 KFC (incl. Rostk's/KFC), 21 Taco Bell. \$3.611 bn sales (+6.5% in constant currency)
6	(7) Burger King*	Burger King	QSR	2,200	2.3%	USA	20	Globally 12,000 stores; System-sales calendar year '09 approx. \$14.7 bn. Europe: 2,432 (+150) stores. Top 4 country markets: Germany 700, UK 511, Spain 493, Turkey 282. Start in Russia.
7	(6) Mitchells & Butlers	All Bar One, Vintage Inns, Toby Carvery, etc.	Pubs	2,199	2.6%	UK	2	Leading UK operator of managed pubs/pub restaurants with 1,958 outlets (+1.6%). Turnover: €1,958 m (+2.6%), operating profit: €300 m (-12.5%). Sales Mix: 53% Beverage, 41% Food, 6% others. Sizeable gains in food.
8	(8) Autogrill/HMSHost	Ciao, Coté France, Spizzico, Acafé, La Galleria, Aldente, etc.	Travel	2,089	-2.2%	Italy	23	*Total group sales: €5,728.4 m (-1.1%); Sales mix: 66% F&B, 27% travel retail & duty free, 7% flight. F&B sales: €3,787 m (North America/Pacific 47%, Italy 34%, others 19%).
9	(9) Accor*	Sofitel, Mercure, Ibis, Lenôtre, Wagons-lits, etc.	Hotels	1,693	-8.0%	France	25	Total revenues: €7,065 m ('08: 7,739). Worldwide 4,111 (Europe 2,310) hotels in 100 countries with more than 150,000 employees. Europe's leading hospitality company.
10	(10) SSP	Caffè Ritazza, Caviar House & Prunier, Upper Crust, etc.	Travel	1,533	3.0%	UK	17	Total sales 2009: £1,559 bn (+5.3%) in more than 30 countries worldwide. Europe: 1,365 bn. Travel Food Expert with over 2,150 units (1,700 in Europe).
<b>Top 10</b>				<b>43,672</b>	<b>3.7%</b>			
11	(12) LSG Sky Chefs Group	LSG Sky Chefs	Travel	1,215	-9.6%	Germany	15	Global leader in airline catering. €2,102 m total sales worldwide (-9.6%). More than 200 flight kitchens worldwide. Europe: 57.8% share, 52 flight kitchens (top 3 countries: Germany, UK, Italy).
12	(11) Aramark*	Aramark	Contract C.	1,200	0.0%	USA	8	Global Contract Caterer with \$12.3 bn (08:13.4 bn) in sales. International F&B: \$2.3 bn. Top 4 markets in Europe: UK, Germany, Ireland and Spain.
13	(15) Whitbread	Beefeater, Brewer's Fayre, Costa Coffee etc.	Restaurants	1,103	13.9%	UK	13	Total revenue: £1,435 m. 373 Pub restaurants £466.2 m (+1.3%), 1,600 (1,069 in UK, 531 int.) Costa Coffee shops - systemwide sales £515.7 m (+28.3% / LFL +5.5%).
14	(14) Best Western*	Best Western	Hotels	1,080	-2.0%	USA	34	World's largest hotel chain (membership association of independently owned and operated hotels). Europe: 1,300 hotels. Approx. F&B share nearly 30%.
15	(13) Wetherspoon	JD Wetherspoon, Lloyds No.1, Lodges	Pubs	1,073	5.2%	UK	1	Total turnover €955.1 m (+5.2%), operating profit €75.1 m (-13.9%). 731 (+37) outlets throughout the UK. Like-for-like sales up by 1.2%.
16	(16) Quick	Quick	QSR	921	3.5%	France	5	Largest European based hamburger chain founded in 1971. 468 units (+15). Europe: 456 units (+15) - mainly France and Benelux. New in Spain and Russia.
17	(20) Camst	Travolamica, Magnosfera, Gustami	Contract C.	867	7.1%	Italy	2	Active in different fields: contract catering (leading in schools), ticket restaurants, restaurants, etc. More than 10,000 employees.

\* Turnover estimated

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# Big, Bigger, the Biggest in Europe

## MARKET RESEARCH

### Europe 2009: Top 111 Foodservice Groups

(classified according to their foodservice turnover without VAT in Europe in the year 2009 - gastronomy, contract catering, F&B in hotels)

R ('08)	Group	Main Brands	Main Sector	Turnover '09 (£m)	vs. '08	Country of Origin	EC	Notes
18 (26)	Ikea	Ikea	In-Store	844	8.5%	Sweden	20	Total group turnover worldwide: €21.5 bn. Foodservice sales (restaurant, bistro, Sweden shop) account for €1,044 m in 301 units. Europe: 236 (+10) locations. Top 3 countries: Germany, France, UK.
19 (22)	Agapes*	Flunch, Pizza Pai, Amarine, etc.	Restaurants	800	1.3%	France	7	Multi-brand player with approx. 450 restaurants. Main Brand: Flunch with more than 250 units. Biggest international market: Spain.
19 (18)	Gategroup*	Gate Gourmet	Travel	800	-0.7%	Switzerland	14	Turnover worldwide: CHF2.7 bn ('08:2.9 bn). No. 2 player in global airline catering. 97 flight kitchens. Europe: CHF1,580 m total sales (-0.7% in constant currency). Since April 2009 listed at Swiss stock exchange.
21 (21)	Starbucks*	Starbucks	QSR	760	-5.0%	USA	19	Revenues worldwide: \$9.8 bn (2008: 10.4). Stores Europe-wide: 1,294 (-9). Top 3 Countries: UK 671 (+44), Germany 143 (+1), Turkey 127 (+11). New partners: Amrest, SSP.
22 (17)	Punch Taverns	Chef & Brewer	Pubs	755	-4.3%	UK	1	Major pub company. Over 7,500 units; most are tenanted or leased. But: 835 (2008: 864) are managed in 4 divisions - revenue £672 m (-4.3%). LFL sales -1.5%.
23 (25)	Domino's Pizza*	Domino's Pizza	QSR	750	10.0%	USA	10	Worldwide market leader in delivery. 8,900 stores. System sales more than \$5.0 bn. Top European countries: UK/Ireland 608 stores (£406.9 m/+16.0%/LFL+8.4%), France 154 stores, Turkey 132 stores.
24 (22)	Greggs	Greggs	QSR	739	4.8%	UK	1	Europe's largest bakery chain. Turnover: £658.2 m (+4.8%) profit before tax £48.8 m LFL +0.8%. Outlets: more than 1,400 (+10). Specialized in sandwiches. 19,000 employees. New brand strategy in 2009.
25 (18)	Subway Int.	Subway	QSR	737	3.0%	USA	27	System sales worldwide \$13.8 bn (+7%). 32,076 stores (+1,819). Europe: \$1,024 bn - 2,900 units (+285). Leading: UK, Germany, France.
26 (30)	SOK	Fransmanni, Amarillo, Sevilla, etc.	Restaurants	671	-1.3%	Finland	2	Group's total sales €11,687 m. Tourism and hospitality trade total €848 m (2008: 846).
27 (28)	Greene King	Hungry Horse, Loch Fyne R.	Pubs	662	3.5%	UK	1	64 Hotels & 266 restaurants, bars, cafes etc.
28 (24)	Rezidor*	Radisson Blu, Park Inn, Regent, etc.	Hotels	650	-14.0%	Belgium	34	Total turnover: £984.1 m (+3.1%). Pub Company: £589.2 m/+3.5% (operating profit £106.4 m/+0.8%). 778 (-1) units under direct management. LFL sales +3.5%.
29 (29)	InterContinental*	InterContinental, Crowne Plaza, Holiday Inn, etc.	Hotels	640	-5.2%	UK	24	System sales approx. €2 bn including leased and managed properties plus franchised units. Revenue down 14%. 286 hotels in operation (232 in Europe). In average 33% F&B sales.
30 (33)	Tank & Rast*	Tank & Rast	Travel	595	0.8%	Germany	1	Worldwide nearly 4,440 hotels (+439) with \$16.8 bn total gross revenues (-9.9% in constant currency). EMEA: 695 hotels (+20).
31 (31)	Hilton*	Hilton, Garden Inn, DoubleTree, etc.	Hotels	570	-5.0%	USA	30	389 service stations at German motorways. Owned by Deutsche Bank (50%) and Terra Firma/UK (50%). A strong focus on branding - own and licensed brands.
32 (32)	Servair	Servair	Travel	566	-4.2%	France	4	181 properties in Europe. Top 2 countries: UK (71 properties) and Italy (16 properties).
33 (35)	Gondola Group	Pizza Express, Ask, Zizzi, Byron	Restaurants	560	10.1%	UK	1	Group sales worldwide in 2009 €755 m (-3.5%). No. 3 global airline caterer. Europe: more than 40 flight kitchens. Top 3 markets France, Italy, Spain.
33 (41)	Cremonini*	Chef Express, Roadhouse Grill	Travel	560	4.3%	Italy	8	Revenues in 2008/09: €498.8 m (+10.1%). Market leader in casual dining. Over 600 sites (378 PizzacExpress, 111 Ask, 106 Zizzi, 10 Byron). Figures without Marzano.
35 (26)	Marriott	The Ritz-Carlton, Marriott, Renaissance, Courtyard, etc.	Hotels	550	-14.0%	USA	24	Total Revenues €2.8 bn (+4.3%). Catering activities (20% of total sales) in different areas: on-board trains, railway station buffets & motorway service areas and the steakhouse business (more than 20 units). Group revenues: \$10.9 m ('08: 12.8). More than 3,400 hotels in 70 countries. Europe: 169 hotels incl franchised. Foodservice sales in Europe: \$763 m.

\* Turnover estimated

© FoodService Europe & Middle East

# Big, Bigger, the Biggest in Europe

## MARKET RESEARCH

### Europe 2009: Top 111 Foodservice Groups

(classified according to their foodservice turnover without VAT in Europe in the year 2009 - gastronomy, contract catering, F&B in hotels)

R ('08)	Group	Main Brands	Main Sector	Turnover '09 (€m)	vs. '08	Country of Origin	EC	Notes
36 (34)	Fazer Amica	Amica	Contract C.	536	-6.3%	Finland	7	Leading in Scandinavia. Sales: Finland 54%, Sweden 25%, Denmark 14%. More than 7,400 employees. Fazer Group total sales €1,441 m.
37 (37)	Groupe Flo	Hippopotamus, Brasseries, Bistro Romain, Tablapizza	Restaurants	525	2.5%	France	4	278 Outlets (+11). Company stores in France (sales: €365 m), Spain, Slovakia, Russia. Also in China and UAE.
38 (36)	The Restaurant Group	Frankie & Benny's, Chiquito, Garfunkel's, etc.	Restaurants	490	5.0%	UK	1	Revenues: £436 m (+5%). 367 restaurants/pubs predominantly in leisure and airports. (+19/-5). Sold 35 m meals.
39 (39)	Buffalo Grill*	Buffalo Grill, etc.	Restaurants	480	-2.0%	France	5	More than 320 units (2/3 company owned). France (300) the others in neighbouring countries. Nearly 32 m customers.
40 (37)	Starwood*	Sheraton, Luxury Collection, Le Meridien, Westin, etc.	Hotels	470	-9.6%	USA	28	Worldwide revenues \$4.7 bn ('08: \$5.7 bn). 992 hotels in nearly 100 countries (EMEA 244/-10).
41 (45)	Vivartia	Goody's, Flocafe, Everest, La Pasteria, etc.	QSR	452	3.2%	Greece	4	No. 1 foodservice company in Greece: 556 (-12) Units with 7 brands. In 2008 acquisition of Everest SA (2nd largest player in Greece).
42 (46)	Migros	Migros	In-Store	431	-4.5%	Switzerland	1	Switzerland's biggest restaurant player (self-service, Gourmessa/take-away) running 190 units. Foodservice turnover: CHF650 m (-4.5%). Total group sales: CHF21.04 bn (-2.4%).
43 (42)	TelePizza*	TelePizza	QSR	430	-8.5%	Spain	4	Global Sales in 2009 nearly €500 m (77% in Spain), 1100 units. Europe: Spain 633, Poland 120 and Portugal 115. Also strong in Latin America. Ambitious expansion plans.
44 (43)	Grupo Vips	Vips, Ginos, Tio Pepe, The Wok, TGI Friday's	Restaurants	426	-6.4%	Spain	2	350 units (-50) with 16 brands (incl. Starbucks-JV for Spain and Portugal/not France anymore). Approx. 130,000 clients daily.
45 (40)	Marston's	Pitcher & Plano, Bostin Locals, etc.	Pubs	413	-3.6%	UK	1	Total group sales: £645.1 m (-1.4%). Inns & taverns: £367.8 m /-3.6% (operating profit: £60.3 m /-6.5%). 496 (-10) managed pubs and bars. Fl. sales -0.6%.
46 (48)	Zena	Foster's Hollywood, Cañas y Tapas, California, Nostrus	Restaurants	403	-1.7%	Spain	1	Almost 480 units across Spain, 7 brands (since 1981 franchisee of Burger King). Rebranding more than 100 Pizza Hut/Yumi stores mainly into Domino's Pizza (mid 2009).
47 (47)	Le Duff*	Brioche Dorée, Del Arte	QSR	400	4.0%	France	7	Group sales (food & foodservice): €820 m ('08: 740), 780 units (720). Brioche Dorée 489 units (+60) with €300 m sales, Del Arte 88 units with €123 m sales. USA: ownership La Madeleine.
48 (49)	SV Group	SV Business, SV Care, SV Event, SV Hotel	Contract C.	392	-2.0%	Switzerland	3	A Swiss institution. Total group sales CHF616 m /-2% (Business 73.7%, Care 14.1%, Event 7.8%, others 4.4%). F&B turnover CHF592 m. 8,098 employees in 545 outlets.
49 (44)	NH Group*	NH Hoteles	Hotels	383	-15.0%	Spain	12	Total revenues hotel business: €1,192 m (-19.6%). 398 hotels worldwide, more than 350 in Europe (Spain 176, Germany 58, Italy 51). F&B sales -15%.
50 (52)	CIR Food	Resteuropa, Progettare Zerosei, Pastarito	Contract C.	375	5.3%	Italy	5	Cooperativa Italiana di Ristorazione. Services: school 24%, commercial 17%, luncheon vouchers (blueticket) 16%, etc. More than 8,100 employees. Nearly 934 directly managed kitchens.
50 (51)	Dussmann*	Dussmann-Service	Contract C.	375	2.2%	Germany	7	Group sales €1,440 m (+2.4%). Nearly 54,000 employees in 24 countries. Main division: facility management. Catering: biggest market Germany (€348 m*/+1.8%).
<b>Top 50</b>				<b>70,321</b>	<b>2.1%</b>			
52 (54)	Groupe Holder*	Paul, Ladurée, Saint Preux	QSR	365	4.3%	France	9	Branded sales in 2008: €456 m. More than 480 units. Flagship brand: Paul with more than 450 stores in nearly 30 countries. Strong also in Asia and Middle East.
53 (50)	Do & Co	Do & Co International, Demel, etc.	Travel	353	-9.0%	Austria	6	Gourmet entertainment company. Turnover: airline catering €259 m(+4.7%), event catering €34 m (-55.8%), restaurants and co. €60 m (-6.0%). Including sales in NYC.
54 (53)	Nordsee	Nordsee	QSR	350	-0.8%	Germany	10	Europe's leading fish/seafood restaurant chain, started in 1965. €297.5 m just in Germany. 414 units (Europe 413) in 10 countries. New markets in Eastern Europe.

\* Turnover estimated

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# Big, Bigger, the Biggest in Europe

Euro zone can be quite complicated statistically.

## The Top 10

The Top 10 operators, with combined sales of nearly €43.7 bn account for somewhat more than half of the volume of all Top 111 companies. As many, many times before, McDonald's comes first by a wide margin and is followed by Sodexo and Compass. Two changes among the Top 10 – in both times (Compass and Mitchells & Butlers) a lower rank because of the weakness of the British pound.

## Growth Champions

This year, the list of the fastest-growing companies is headed by a South African brand with its European business (mainly UK), the Nando's quickservice restaurants, with an increase of 25.6%. It is followed in second and third places by AmRest based in Poland (also QSR) with a 15.1% jump in system sales and Whitbread restaurants, another British player (pub-restaurants

### Rules: Top 111 in 2009

- Where possible, figures as reported; estimates shown with asterisk\*
- Turnover/system sales based on company performance and activities in European markets including franchise activities, excluding sales taxes
- Growth rates are shown in constant currency
- Foodservice includes food and beverages only; accommodation etc. is excluded
- Ranked by corporations, not brands
- Categorised by main business field
- Conversion into Euros, where necessary, at average 2009 exchange rates
- Hotel food and beverage sales, where not given by the company or noted separately, are estimated as follows:
  - 1-3\*: 20% share of sales
  - 4-5\*: 30% share of sales
- UK-pubs: managed estates only
- Franchised and other overlapping activities are double counted

and Costa Coffee shops) with a 13.9% plus. The Top 10 growth champions – a colourful mix: 5 companies in the quickservice category (Nando's, AmRest, Wagamama, Caffè Nero and Hesburger) and 6 companies are based in UK (Whitbread, Wagamama, Welcome Break, Caffè Nero, Fuller, Smith & Turner and Gondola Group). Altogether, only 11 of the Top 111 companies noted double digit rates of growth – based on individual company performance. By comparison, there were 42 in the year 2007 and 29 in the year 2008.

At the opposite pole: 52 players with de-

clining sales – against 15 in 2008 and just 9 in 2007.

Yes, it was a tough year for the restaurant industry. Only the quickservice category had both: less and more visits because of the trading down effect. Pizza delivery for example does typically well in recession times.

## Sectors

A glance at the various sectors shows clearly that quickservice restaurants and contract caterers have the largest market

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## MARKET RESEARCH

### Europe 2009: Top 111 Foodservice Groups

(classified according to their foodservice turnover without VAT in Europe in the year 2009 - gastronomy, contract catering, F&B in hotels)

R '08	Group	Main Brands	Main Sector	Turnover '09 (€m)	vs. '08	Country of Origin	EC	Notes
55 (56)	Pellegrini	Pellegrini	Contract C.	325	-3.8%	Italy	1	Total turnover: €391 m (+1.6%). Foodservice: approx. 450 locations. Established in 1965 by Ernesto Pellegrini. Also activities in Africa (sales: €34 m in 5 countries).
56 (60)	Servex	Smullers, Broodzaak, Swilliers, Café T Espresso	QSR	324	4.5%	Netherlands	1	325 units at approx. 110 railway stations. Serving up to 250,000 people daily. Total of 18 concepts. New: Starbucks on train stations.
57 (66)	Nando's	Nando's	QSR	314	25.6%	South Africa	3	Founded in 1987. 867 restaurants in 29 countries. Europe: sales €280 m, 225 units (+19) - very strong in UK (London: 60 x).
58 (61)	Marks & Spencer*	M&S Cafe, etc.	In-Store	310	2.0%	UK	2	Group sales: £4 bn. Operating 283 M&S Cafes (rebranded from Cafe Revive), 48 hot food to go units etc. Total 352 sites. Not included are foodservice sales in more 300 M&S simply food stores.
59 (62)	The Eat Out Group	Pans & Co, Ribs, FresCo, etc.	QSR	303	1.0%	Spain	4	675 units (+5). Top 3 countries: Spain (strong in F&B concessionary business at airports), Portugal, Italy. Operating also in Middle East, India + South America. Ww 700 units.
60 (74)	Bay / Town & City Pub Group*	Slug & Lettuce, La Tasca, ha ha	Restaurants	298	-2.3%	UK	1	Sales £265 m, more than 320 sites. Sister companies owned by Kaupthing and Commerzbank. Bay is up for sale through McQueen.
61 (54)	Moevenpick/ Marché Int.	Marché, Mövenpick	QSR	297	-7.3%	Switzerland	11	Total sales worldwide: CHF1,339 m (-7.8%). Nearly 140 units in Europe CHF449.2 m F&B-sales mainly in Germany and Switzerland. Good development for Marché International (new markets: Hungary, Croatia).
62 (58)	Amrest	KFC, Pizza Hut, Burger King, Starbucks, Applebee's	QSR	295	15.1%	Poland	6	Total sales: PLN2,000 m (incl. US business/Applebee's) European sales: PLN1,275 m (+15.1%). 334 restaurants (+33).
63 (59)	Tragus	Café Rouge, Strada, Bella Italia, and the Brasseries	Restaurants	294	5.7%	UK	1	FY'09: Sales £262 m (+£14m/lfl -2.3%). Independently owned (majority Blackstone) multi-brand operator with 277 sites (more than 100 Café Rouge). Major acquisitions in 2007 (Strada).
64 (62)	Groupe Casino*	Casino Cafétéria	In-Store	290	-3.3%	France	1	Consolidated net sales €26.7 bn (-1.2%). More than 10,000 outlets in Europe and international. More than 250 cafeterias/corporate dining areas in France.
65 (65)	Umoe Group	Peppes Pizza, Café Opus, Burger King, TGI, La Baguette, etc.	Restaurants	284	4.3%	Norway	2	Biggest foodservice player in Norway. Foodservice sales: NOK2,476 m ('08: 2,394). 220 units in Europe, total 228. Multi-brand growth strategy.
66 (70)	Prêt A Manger	Prêt A Manger	QSR	275	9.2%	UK	1	Total sales: £277 m. UK: £244.4 m (+9.2%) - 200 (+4) units, more than 100 wide-spread in London. Present also in US (24) and Hong Kong (8).
66 (68)	Serare SAS	Grill Courtépaille	Restaurants	275	1.1%	France	2	Oldest restaurant chain in France. 215 (+2) units throughout France and Poland (new) - 168 company, 47 franchise. 14 m guests, 3,000 employees.
68 (57)	Metro*	Dinea, Grillpflanze, etc.	In-Store	270	-20.0%	Germany	13	Total turnover €65.5 bn. Mainly restaurants in Kaufhof department stores and Metro C&C markets (Germany: €185 m/-26.2%/196 units/-46), approx. 290 outlets in total.
69 (64)	Sol Meliá*	Sol, Tryp, Meliá, Premium	Hotels	266	-10.1%	Spain	9	Largest resort hotel company in the world (revenues: €1,148 m/-10.2%). More than 300 hotels in nearly 30 countries.
70 (73)	Arturo Cantablanco	Arturo, Tony Roma's, Tikki Grill, Pizza Jardin	Contract C.	264	3.5%	Spain	1	Family empire founded in 1898. Portfolio: Contract Catering (57%), Fine- & Casual Dining (13%), Hotels (12%), Motorway (6%), Others (12%).
71	The Orchid Group	Pubs & Dining	Pubs	255	5.8%	UK	1	6th largest managed pub company. Established in 2006. 290 sites with sales of £226.6 m, 6,500 employees.
72 (69)	Albron	Albron, Lunch Together, Food & Shop etc.	Contract C.	253	-6.0%	Netherlands	1	Throughout the country 1,100 sites. Number 2 in contract catering. New in 2010: food service in Center Parks and Sunparks.
73 (92)	Trivalor*	Gertal, Itau, Socigeste, etc.	Contract C.	250	6.4%	Portugal	1	Total group turnover: €315 m. Over 2 m customers per year. Also active in public restaurants, logistics, vending and facility management.

\* Turnover estimated

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shares among the Top 111 followed by the restaurants, travel and F&B in hotels. Over the years, there have been few changes to this structure apart from the increasing importance of QSR (driven by expansion).

## Quickservice

24 of the Top 111 names are in this category. The majority are based in the USA, UK and France. With a turnover of nearly €29 bn, they represent more than one third of the total. It's the full range from pizza delivery and hamburger stores to coffee bars and noodle shops.

QSR was the fastest-growing segment last year with turnover up by 5.4% (2008: +10.4%).

The segment is more powerful than any other category. It's the pace-maker of the restaurant industry – most new openings, most innovation, most profit, most chained and most industrialized.

3 young concept categories – fast casual, coffee shops and bakery cafés – are the main drivers of this segment. They push long time established companies more than any other influence. Classical quickservice concepts have to be upgraded – and they did. Otherwise the consumer is down-trading them.

## ■ ■ ■ Distribution\*\* ■ ■ ■

R	Group	Countries
1	McDonald's	37
2	Best Western*	34
3	Rezidor*	34
4	Yum! Rest. Int.	32
5	Hilton*	30
6	Sodexo	29
7	Starwood*	28
8	Subway Int.	27
9	Accor*	25
10	InterContinental*	24
11	Marriott	24
12	Compass Group	23
13	Autogrill/HMSHost	23
14	Burger King*	20
15	Ikea	20
16	Starbucks*	19
17	SSP	17
18	LSG Sky Chefs Group	15
19	Kempinski*	15
20	Choice*	15
21	Gategroup*	14
22	Whitbread	13
23	Metro*	13

\* estimated \*\* In Europe  
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One more thing is very clear: compared to other categories, quick service restaurants are most recession resistant. Out of 24 names only 2 with declining sales (Starbucks and Telepizza).

A few words about the segment leader. McDonald's, which rang up a 7% increase in sales calculated in constant currency terms. The company only opened 157 new stores between Ireland and Russia, which means that the driving force for growth comes primarily from existing stores (relaunch and product innovation). Comparable sales went up 5.2% (following 8.5% in 2008). The figures are impressive:

- 12.1 m customers served per day
- 375,000 people are employed
- free Wifi-connections are available in 90% of all restaurants.
- over 60% of all stores have new interiors.
- more than 1,100 McCafés.

In 2009, about \$1 bn got invested across McDonald's Europe. By the way, France, Germany and UK are bringing in two third of the operating income in Europe for the corporation in Oak Brook. Next year the brand will celebrate its 40th anniversary in the old world. McDonald's got started 1971 in The Netherlands and Germany.

Looking into the future, it's also about investing in multi day-parts. In many European countries the morning business is nearly untapped, great opportunities for quickservice in the long run. In general, it's about snacks & drinks, about driving traffic throughout the entire day.

## Contract catering

Contract catering was represented by 19 companies in this year's listing and their combined sales reached a very creditable €22.2 bn in 2009, an increase of 2.5%.

The four largest contract caterers (Sodexo, Compass Group, Elior and Aramark) operate in many countries across Europe – and indeed across the globe generally.

Most others in this list have regional networks, which means 1 to 5 countries. Best in growth: Group API from France with 13.4% plus

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# Big, Bigger, the Biggest in Europe

## MARKET RESEARCH

### Europe 2009: Top 111 Foodservice Groups

(classified according to their foodservice turnover without VAT in Europe in the year 2009 - gastronomy, contract catering, F&B in hotels)

R ('08)	Group	Main Brands	Main Sector	Turnover '09 (€m)	vs. '08	Country of Origin	EC	Notes
73 (70)	Disneyland Paris*	Foodservice at Disneyland Paris	Restaurants	250	-5.7%	France	1	15.4 m (+1%) visitors. Total revenues €1,230 m (-7%); 55.9% theme parks, 38.5% hotels & Disney Village, 5.6% others. Theme parks average spending per guest: €44.22 (-5%). 74 restaurants Resort-wide.
73 (67)	NorgesGruppen Servicehandel*	Dolly Dimple's, Kaffeobrenneriet, Big Horn Steak House, etc.	Restaurants	250	-7.8%	Norway	2	Total sales NOK 53.2 bn. Foodservice/convenience sector: 80 Dolly Dimple's, 32 Big Horn Steak Houses (1st unit in Spain), also fast-food/kiosks. Nearly 1,000 units.
76 (82)	Groupe API	api, rdr, lys, NEOR	Contract C.	246	13.4%	France	2	Largest French family business in contract catering. More than 3,000 employees, 355,000 meals per day. Active in all segments. Also in Belgium.
77 (72)	BaxterStorey	BaxterStorey	Contract C.	243	3.0%	UK	1	Sales: £216 m ('08: £210 m), operating profits: £13.3 m (12.2), 1,012 accounts (926). UK's largest independent contract caterer. Especially active in upscale B&I.
78 (75)	Rosinter Restaurants	Planet Sushi, Il Patio, TGI Friday's, etc.	Restaurants	242	1.5%	Russia	9	System sales of RUB10,630 m (+1.5%) announced. Leading casual-dining restaurant company in Russia and CIS. 350 outlets (Moscow: 166) including 95 franchised. Costa Coffee - JV with Whitbread.
79 -	Carlson Restaurants Int.	TGI Friday's	Restaurants	235	5.5%	USA	17	Total sales world wide \$2.5 bn in 61 countries. Europe: 116 units (+10). UK (presence since 1986/today 46 units) and Russia are the top 2 markets.
80 (80)	Maxeda	La Place - Bijenkorf	In-Store	225	1.8%	Netherlands	2	Turnover includes Les Halles /La Place with 228 outlets at 113 locations (+2), expansion into Belgium and new market segments (canteens, theme parks etc.). 5,000 employees.
81 (79)	Van der Valk	Van der Valk	Hotels	224	1.0%	Netherlands	5	Netherlands' largest hospitality company (besides McE), privately owned. Sales over €500 m. 82 hotels/restaurants in Europe (56 NL). Approx. 10,000 employees.
82 (77)	El Corte Inglés*	El Bodegón Canario, Las Trebedes, Mediterráneo	In-Store	220	-2.7%	Spain	2	Sector leader in Spain. Founded in 1934. 78 department stores and 36 hypermarkets with cafeterias, sandwich bars but also fine dining.
83 (84)	Schubert	Schubert	Contract C.	214	2.7%	Germany	1	210 contracts, mainly at hospitals & elderly homes. 2,200 employees. Main growth in the field of hospitals.
83 (76)	Restel	Huviretki, Matina, Golden Rax Pizzabuffet, etc.	Restaurants	214	-7.0%	Finland	1	Total revenues €341.6 m. 254 restaurants with €159.5m (-4.9%). 46 hotels incl. 66 restaurants €181.8 m (-12.8%).
85 (88)	Apetito	Apetito	Contract C.	208	5.8%	Germany	3	Total sales of Apetito Group: €655 m (-2%). German pioneer for meals on wheels. Contract catering share: €208 m (Germany €168 m, 525 contracts, France €40 m, 110 contracts).
86 (83)	Ibersol	Pizza Hut, Cantina Mariachi, Pasta Caffé, Arroz, Maria, etc.	QSR	207	-3.3%	Portugal	2	Multibrand player mainly in Portugal. Apart from own brands also franchisee of Yumi, Burger King & The Eat Out Group. Portugal: 310 units, Spain 116 units.
87 (85)	Comess Group	Cantina Mariachi, Lizarrán, Pasta City, Rock&Ribs etc.	Restaurants	200	-2.0%	Spain	7	Nearly 390 outlets (mostly franchised) - thereof 363 in Spain. Active also in Middle East, China and USA. 2010+ strong expansion with the new brand China Boom!
87 (78)	Scandic	Scandic	Hotels	200	-11.0%	Sweden	10	Nordic region's leading hotel chain. Total revenues €661.0 m, 138 properties with restaurants. 6,090 employees.
89 (86)	Klueh	Klueh Catering	Contract C.	199	-1.5%	Germany	1	Contract catering only in Germany. Nearly 150 contracts. More than 3,000 employees. Very strong in the care segment.
90 (91)	Caffè Nero Group*	Caffè Nero	QSR	191	11.0%	UK	3	Sales: £170 m ('08: £153 m). 450 Italian-style coffee bars - also in Ireland and Turkey. 50 new units. Established in 1997 by Gerry Ford, taken private again in 2007.
91 (89)	Groupe du Louvre*	Concorde, Campanille, Kyriad, Première Classe	Hotels	190	-2.6%	France	9	Global sales: €2.2 bn. More than 950 hotels in Europe (mainly in France): mostly budget category, but also luxury brands. Owned by Starwood Capital.
92 (89)	Barracuda	Varsity, Smith & Jones, Cape, Barracuda Bar, Juniper	Pubs	185	6.3%	UK	1	Turnover £165 m ('08: £155m). More than 225 managed pubs and bars (5 brands).

\* Turnover estimated

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## MARKET RESEARCH

### Europe 2009: Top 111 Foodservice Groups

(classified according to their foodservice turnover without VAT in Europe in the year 2009 - gastronomy, contract catering, F&B in hotels)

R ('08)	Group	Main Brands	Sector	Turnover '09 (€m)	vs. '08	Country of Origin	EC	Notes
93 (99)	Hesburger Group	Hesburger	QSR	182	10.3%	Finland	5	Operating 275 (+11) units also in the Baltic region. Family owned, 5,000 employees.
94 (87)	Hyatt*	Park Hyatt, Grand Hyatt, Hyatt Regency	Hotels	180	-10.0%	USA	13	Hyatt Hotels Corp.: 424 properties in 45 countries. EMEA: 36 hotels. Estimated F&B share 40%.
95 (97)	Tui Hotels & Resort	Riu, Robinson, Iberotel, Magic Life, Grupotel, Grecotel, etc.	Hotels	173	0.8%	Germany	12	Europe's largest holiday hotelier. Turnover reflects hotels in ownership and lease only. 183 hotels in this part of the world (Top 3: Spain, Turkey, Greece). 294 properties globally.
96 (94)	Maritim*	Maritim	Hotels	170	-8.1%	Germany	5	One of Germany's largest hotel companies. Total group turnover more than €400 m. Operating 49 hotels of which 37 in Germany.
97 (101)	Coop Suisse	Coop Suisse	In-Store	166	0.9%	Switzerland	1	Total group sales: CHF19.7 bn. Restaurant turnover CHF251 m (+0.9%). 183 units in Switzerland. 1,531 employees in foodservice. Strong in organic foods.
98 (95)	Kempinski*	Kempinski, Vier Jahreszeiten, etc.	Hotels	160	-12.6%	Germany	15	Oldest luxury hotel collection in the world. 66 properties in more than 20 countries. 31 (+1) hotels across Europe of which 10 in Germany. High F&B share.
99 (93)	Fuller, Smith & Turner	Ale & Pie, English Inns, City Pubs, etc.	Pubs	155	11.0%	UK	1	Total group revenues: £227.7 m (+8%) incl. brewing. 163 managed pubs and hotels in Fuller's Inns division. Sales £137.9 m (Lfl. +2.7%). Strong acquisitions.
100 (96)	Karstadt	Karstadt, Le Buffet	In-Store	154	-13.7%	Germany	1	Department store business, fresh-flow-restaurants. 92 units (-42). Downsizing process, parent company in financial difficulties.
101 (108)	DSR	DSR	Contract C.	153	2.9%	Switzerland	1	Sales CHF231m (+2.9%). 235 contracts mainly B&I but also schools and care. More than 1,500 employees.
102 (103)	Choice*	Comfort, Quality, Clarion, etc.	Hotels	150	-10.0%	USA	15	More than 6,000 hotels in more than 30 countries worldwide (brands in every value based price range), of which are 406 in Europe ('08: 412). Strongest markets: France (107), Norway (76), UK (44), Sweden (64).
103 (106)	Groupe Bertrand*	Eris Cafétéria, Toastissimo, Bert's Café Contemporain	QSR	147	0.0%	France	1	Multi-concept player, very strong in Paris.
104 (105)	KLM Catering Services	KCS	Travel	140	-6.0%	Netherlands	1	Largest in-flight caterer in NL. 1,100 employees. On a yearly basis KCS prepares meals for 20 m passengers at Schiphol Airport Amsterdam.
104 (103)	GK Arkady Novikov*	Vogue-café, GQ, Elki Paiki etc.	Restaurants	140	-6.7%	Russia	1	Empire of Arkady Novikov (luxury dining guru of Moscow), 35 fine dining units, like Vogue café. Also casual chains like Elki Paiki, Little Japan. Totally more than 140 stores.
104 (100)	Steigenberger*	Steigenberger	Hotels	140	-12.5%	Germany	5	Total group revenues est.: €435 m ('08: €494.9 m), operating 79 hotels. F&B sales: 32%. Company sold to Egyptian tourism player (Hamed Chiaty).
107 (102)	DB Gastronomie	Train catering, DB canteens	Travel	138	-4.8%	Germany	1	Foodservice activities of the Deutsche Bahn-train catering: €84.3 m (-4.2%), staff catering: €53.5 m (-5.5%).
108 (111)	Wagamama	Wagamama	QSR	134	12.6%	UK	9	Total sales £141.8 m (+14.4%), 102 units (+2). Europe £119 m, 76 units. Top 3 countries: UK, Netherlands, Ireland. Strong in Australia.
108 (109)	Bars&Co	Au Bureau, Irish Corner, Café Lefte...	Restaurants	134	-1.1%	France	1	More than 100 units. One of the leaders in the franchised bar/brasserie segment.
110 -	Welcome Break*	EAT IN, Coffee Primo, KFC, Burger King	Travel	133	12.0%	UK	1	Total sales £607 m. Operator of nearly 30 motorway service areas plus adjusted hotels. Several own brands, new partnerships with Waitrose and Starbucks. Foodservice sales £118 m.
111 -	Young's	Young's	Pubs	127	1.3%	UK	1	Total revenue: £127.5m (219 pubs). 120 managed sites with £112.9 m sales (+1.3%) and £26.3 m operating profits (+1.3%).
<b>Total 111</b>				<b>83,850</b>	<b>1.7%</b>			<b>Lfl. = like for like sales</b>

\* Turnover estimated

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# Big, Bigger, the Biggest in Europe

## Top 111 by Country

Country	No.1	Turnover €m		
		'09	vs.'08	Ø
USA	14	26,790	4.1%	1,914
UK	24	18,672	2.0%	778
France	17	17,417	2.6%	1,025
Germany	14	4,361	-5.6%	312
Italy	5	4,216	0.9%	843
Spain	9	2,895	-5.6%	322
Switzerland	6	2,239	-2.3%	373
Finland	4	1,603	-2.7%	401
Netherlands	5	1,166	-0.4%	233
Sweden	2	1,044	4.1%	522
Belgium	1	650	-14.0%	650
Norway	2	534	-1.7%	267
Portugal	2	457	1.8%	229
Greece	1	452	3.2%	452
Russia	2	392	-3.2%	196
Austria	1	353	-9.0%	353
South Africa	1	314	25.6%	314
Poland	1	295	15.1%	295
<b>Total</b>	<b>111</b>	<b>83,850</b>	<b>1.7%</b>	<b>755</b>

<sup>1</sup> of companies

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are the segment leader with 8.5% plus and Marks & Spencer with 2.0% increase in food-service sales. The whole in-store-category is dominated by self-service-concepts, female

## Top 111 by Sector

Sector	No.1	Turnover €m		
		'09	vs.'08	Ø
QSR	24	28,677	5.4%	1,195
Contract C.	19	22,217	2.5%	1,169
Restaurants	21	8,284	1.7%	394
Travel	11	8,122	-2.1%	738
Hotels	18	7,816	-8.0%	434
Pubs	9	5,824	2.2%	647
In-Store	9	2,910	-1.7%	323
<b>Total</b>	<b>111</b>	<b>83,850</b>	<b>1.7%</b>	<b>755</b>

<sup>1</sup> of companies

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customers and an above-average number of elderly people – the core clientele of this category.

### Where do the operators come from?

14 US companies have the largest sales share of the Top 111 and account for more than 30% of the total. This figure has been climbing continuously since we launched the Top 111. QSR concepts and hotel brands are ambassadors of the United States. In the international arena, no European country has so many well established and

relatively easy travelling brands as North America. Simple, not sophisticated business models.

24 names are UK-based and they represent nearly one quarter of the Top 111 volume. This year, they have declined in significance for the rating because of the weakness of the British pound.

Number 3 in line are French players with a 20% market share and 17 companies.

Together, the top 3 countries hold a good three quarters of the Top 111 market – no significant changes for many years.

A few words about Germany: 14 names and a 5% market share in the ranking. That's definitely well below average for a

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# Big, Bigger, the Biggest in Europe

## MARKET RESEARCH

### Comparison Top 10

Europe (>800 m people) Turnover '09			USA (>300 m people) Turnover '09		
	R			R	
McDonald's	1	€15,314 m	Mc Donald's	1	\$31,033 m
Sodexo	2	€6,651 m	Yum!	2	\$17,400 m
Compass Group	3	€5,905 m	Wendy's/Arby's	3	\$10,902 m
Ellor	4	€3,561 m	Subway	4	\$9,999 m
Yum! Rest. Int.	5	€2,597 m	Burger King	5	\$8,882 m
Burger King*	6	€2,200 m	Starbucks	6	\$7,415 m
Mitchells & Butlers	7	€2,199 m	Compass Group	7	\$7,100 m
Autogrill / HMSHost	8	€2,089 m	DineEquity Inc.	8	\$6,884 m
Accor*	9	€1,623 m	Darden Rest. Inc.	9	\$6,710 m
SSP	10	€1,533 m	Aramark	10	\$6,295 m
<b>Total Top 10</b>		<b>€43,672 m</b>	<b>Total Top 10</b>		<b>\$112,619 m</b>
		<b>(+3.7%)</b>			<b>(-0.6%)</b>

\*estimated

Source: FoodService Europe & Middle East / NRN

nation of 82 m people in the heart of Europe. Why? The restaurant business in Germany is still highly fragmented with no restaurant company quoted on the stock exchange.

#### Comparison with the US

Particularly interesting is a comparison of the top 10 European players with the top 10 in the USA. In the old world, these companies stand for €43.6 bn; in the new world

for US\$112.6 bn. When it comes to inhabitants, the relationship turns through 180 degrees: Europe has more than 800 m people, the USA over 300 m. You don't have to be a rocket scientist to see that the level of importance and degree of concentration in the foodservice sector between New York City and San Francisco is very much greater than that between Dublin and Moscow. There are four names in both top 10 rankings – McDonald's, Compass, Yum! and Burger King. In Europe, system sales

of the top 10 grew by 3.7% in 2009 – a great result for a difficult year (over twice as good as the average for the top 111). A complete contrast was the situation in North America where the top 10 sales declined by 0.6%, something that has never happened before. Over half of all names registered a drop in their home market.

#### Some final words

It requires painstaking and time-consuming work to put this listing together each year and we would like to extend our best thanks to everybody who helped us. Since compiling our first listing in 2000, we have aimed to improve it year by year. We hope we have captured all the big players and made no significant mistakes. However, please let us know if we have left out any companies or if the information is less than perfect – we look forward to hearing from you.

Big thanks for help to Bruce Whitehall (UK), Mario Cafizal Villarino/Katrin Schendekehl (Spain), Karel de Vos (Netherlands), Sofia Seiberg (Scandinavia) and Julia Matveeva (Russia). [foodservice@dfv.de](mailto:foodservice@dfv.de) **GW**

# HOBART



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WAREWASHING

COOKING

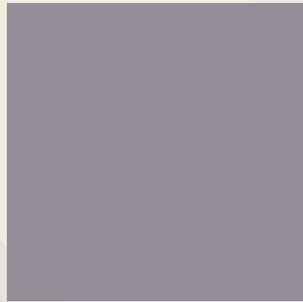
FOOD PREPARATION

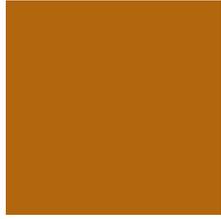
WASTE TREATMENT

SERVICE

**Pan European  
Overview of Top  
Biggest Brands  
in the Coffee Bar  
segment**

**3**





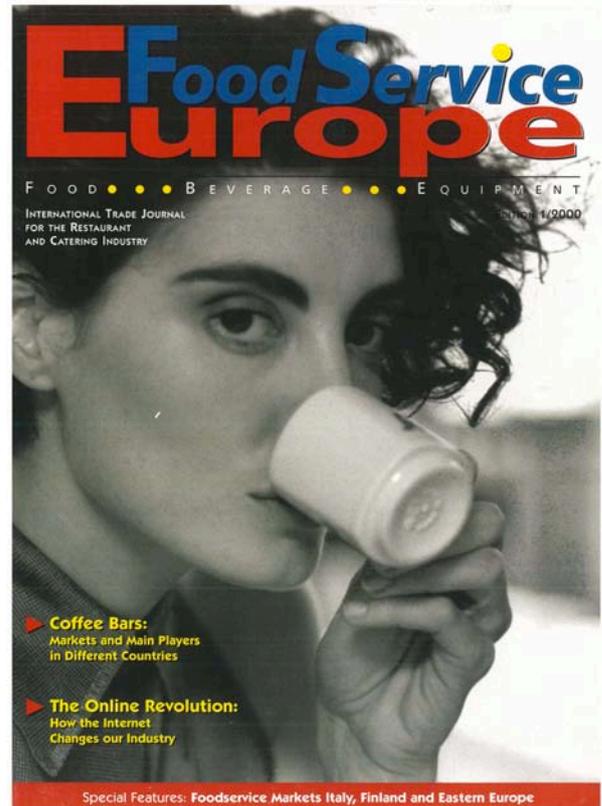
En Alemania siempre ha habido culto al café, tanto o más que a la cerveza. No es de extrañar pues que sus revistas profesionales le dediquen páginas y páginas, máxime cuando es una bebida que ha mutado a funcionalidades tales como, entre otras, las de:

- Dar pie a crear una división o segmento del foodservice, como es el de los coffee shop o coffee bar, convirtiéndolos en el segundo salón del hogar, después en oficina y siempre en estilo de vida.
- Mutar de bebida caliente a fría formando parte del surtido del snacking.
- De consumirse sólo por las mañanas o tras una comida, a hacerlo las 24h del día.
- De pasar del “sólo o con leche” a mezclarse con muchos más ingredientes (smoothies)
- De tomarse en taza a hacerlo en cups y otros envases de tamaño superior.

Y a nivel empresarial ha presenciado como Howard Schultz revolucionó el sector, siendo el protagonista principal de un cambio de paradigma que destronará a Costa Coffee en el Reino Unido o a Tchibo en Alemania y pondrá contra las cuerdas a marcas italianas como Illy o Lavazza, a la vez que despierta entre los “roasters” tradicionales, la iniciativa de crear marcas locales y empresas, que en el caso de España las hará subir a los rankings europeos y consagrar a ciudades como Barcelona, capital europea del café. Su entrevista es la primera declaración de motivos de tan gran empresa en la actualidad.

Todas esas vicisitudes en torno al café tendrán a Gretel Weiss como paladina, no sólo otorgando al sector de coffee bars, páginas especiales en la revista que dirige, sino creando CAFÉ FUTURE, una especie de ágora donde reunir a todos los componentes de su cadena de valor. Y lo hará a modo pop up: convocándolo en ferias y eventos donde pueda hablarse de ese otro oro líquido, aunque negro, que ha elevado a Starbucks a los altares, pero que tiene ya en las marcas chinas una seria, muy seria, competencia internacional.

A continuación, podrán repasar los primeros editoriales y reportajes de la revista sobre el café en la hostelería y analizar los datos de los primeros rankings creados, primero con 55 empresas y después hasta con 70, en esta etapa aquí



considerada, suponiendo en su conjunto llegar a 10.000 locales entre todas ellas.

En cuanto a editoriales firmados por WyW destacar el que comenta sobre Starbucks en Europa y el titulado *Coffee Bar: All Europe*. Se han seleccionado reportajes sobre los primeros artículos sobre coffee bars europeos en la revista, en 2000 y 2001 al que sigue un artículo sobre el sector en España (2003) y el primer ranking Top55 en 2006, al que le seguirá el Top60 en 2008 junto a un artículo sobre Barcelona como capital europea de coffee bars, terminando con el Top70 publicado el año 2010 y que figura en las siguientes páginas para su lectura y análisis, después de los editoriales que WyW publicaron sobre Starbucks

Destacar en las listas, la presencia de numerosas marcas españolas que hará incluso que España supere a Alemania en el número de ellas en los rankings de esta etapa y que además provocará que Barcelona aparezca en más de un reportaje de forma monográfica o catalogada con Londres como “primus inter pares”.



Así pues: Este capítulo contiene los reportajes\* sobre rankings correspondientes a los años de publicación siguientes:

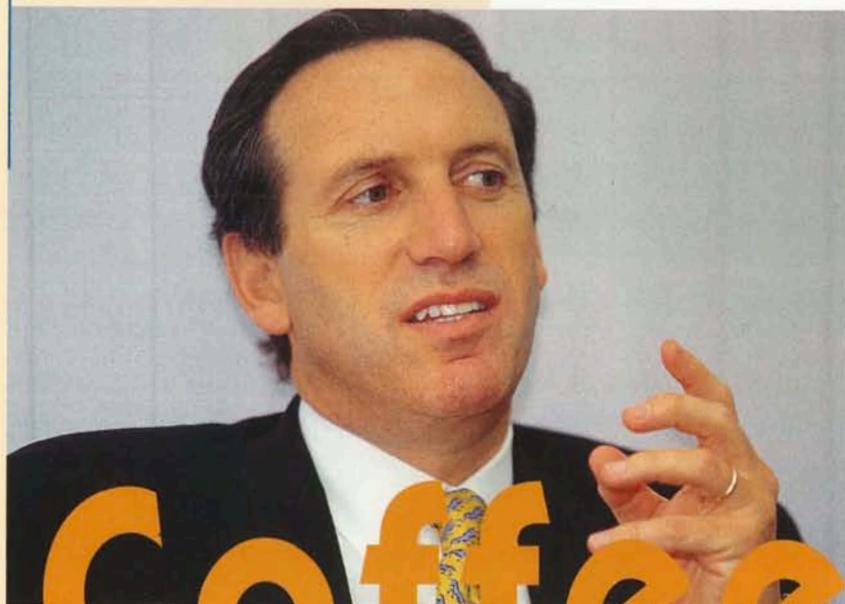
Fecha de Aparición	Título	Contenido
2000	Portada de la revista sobre coffe shop	Novedad
2001	Coffee Bars: All Europe	By WyW
2001	Why wasn't Starbucks a European Invention?	By WyW
2000	Coffee Champion: Howard Schultz	interview
2000	Espresso Express	2000
2001	Macciatto's Mainland	2000
2003	Coffee Bars in Spain	2002
2006	Most Insights Most Growth	2005
2007	Growth of Almost 20%	2006
2010	3 Brands with over 1000 outlets each	2009

Y se desarrollan a continuación:

Fecha de Aparición	Título	Contenido
2000	Coffee Champion: Howard Schultz	interview
2001	Coffee Bars: All Europe	By WyW
2001	Why wasn't Starbucks a European Invention?	By WyW
2010	3 Brands with over 1000 outlets each	2009

**\*Estos artículos pueden solicitarse a: [www.dfv-archiv.de](http://www.dfv-archiv.de)**

## INTERVIEW



# Coffee Champion

**Your entry into Europe was via a major UK acquisition (Seattle Coffee, which had built up over 60 branches in just three years). Are you seeking other acquisitions?**



**Schultz:** I think the acquisition in the UK will prove to have been more or less an anomaly. I don't really see an opportunity to replicate that in other countries. What we've learned in the 20-plus countries we have gone into is the unbelievable value to having a strong local partner. There are so many issues that have to be sorted out. So we are in discussions with a number of very strong partnership candidates in a number of countries and that is probably the route we will keep to in the future.

**What do you look for in a partner?**

**Schultz:** We have partnerships of a kind that are probably not that common. For example, most US companies going to

Japan partner with one of the very large trading companies. But when we met those types of business, and their people, we just didn't feel comfortable. We want partners who are entrepreneurs and who also understand and value people.

So in 1995 we selected a pretty small company (Sazaby) to develop Starbucks coffee houses around Japan. Their competency, aside from having a strong internal culture, was that they were operators of speciality tea stores and tea shops. If you look at the partners we've developed subsequent to that, many of them are like Sazaby. For example, Bon Appetit in Switzerland (which opened the first Starbucks in Continental Europe in March 2001) is not a very large company. But it has real expertise in food and multiple locations and has a great culture inside the business.

We have to find people who will, first and foremost, value and embrace the culture and esprit de corps which we have created. We then look for evidence of core competency in multi-store management of retail stores and/or restaurants.

Howard Schultz, the man who took Starbucks from Seattle niche retailer to global coffee-shop powerhouse, is a somewhat unnerving mixture of altruist and super-salesman. He is an ardent advocate of human values, introducing genuine social improvements to US foodservice, but he is also ruthlessly competitive in pursuing his vision of a world-beating beverage company. Fundamental to his confidence and tenacity is a dedication to quality and this now faces its greatest test: entry to the diverse and sophisticated markets of Continental Europe.

Interview by Bruce Whitehall

### ■ ■ ■ Facts & Figures ■ ■ ■

- Starbucks operates 4,000 stores in 25 countries, serving 15million customers per week.
- It has targeted 500 outlets open across Europe by the end of 2003. Globally, three new stores open every day.
- the average customer is estimated to come back 18 times per month.
- the company now employs over 50,000 'partners', about 65% are part-time.
- Starbucks claims a 6% market share of US coffee consumption.
- 1999 results showed that 15.3% of Starbucks total net revenue of \$1.68 bn came from activities other than its foodservice/retail outlets.
- in 2000, the Starbucks brand was recognised (by Fortune magazine) as one of the top 75 brands in the world.

### How do these partnerships actually work?

**Schultz:** The exact arrangements vary from country to country but the ideal one, I think, is a joint venture in which there is equity participation on both sides. So we both have a stake in the out-

## INTERVIEW



come of the business and there is a real co-operation in the strategy.

**All the main global foodservice players to date have relied, often heavily, on franchises to augment their own stores. But it's a route which you have so far avoided totally. Why is that?**

**Schultz:** If you look at a lot of things Starbucks have done, we really have striven to take "the road less travelled" in so many different ways. For me, franchising was nothing more than access to capital. If you think about what we've created, in terms of the relationship with our people and with our customers, I don't believe it was suited to a franchising system.

The level of control in terms of training, store design, customer service and many other aspects was, I felt, much better suited to a single company operation in which we could deal with the culture and values of our business together. If we had franchised our business, I don't think we'd have become the force we have today. I don't think franchised chains are built to last. Aside from McDonald's, there aren't a lot of strong success stories. The McDonald's system was created a long long time ago and is, in any case, different from the others in having a strong property ownership element.

**What is the likely timing of your European roll-out?**

**Schultz:** There are five Continental countries that we are keen on initially: Switzerland, Germany, France, Italy and Spain. The sequencing is unknown but we are on our way. I think it is critically important that Starbucks comes to these markets and succeeds.

**Coffee consumption in parts of Europe is higher than anywhere else in the world (up to 11 kg per capita**

**compared with less than 4 kg in the USA) and the 'palate' for coffee differs considerably, particularly from North to South Europe. There are also many differences in national preferences in roasting, grinding and whitening coffee. The culture of coffee-taking also varies a lot, for instance between Germany and Italy. Do you expect to adapt products and formats in different countries?**

**Schultz:** The coffee we serve will be identical to the coffee we sell in the USA. It will be a mirror image of the coffee that has built our business in the US. That is the coffee we introduced in Zurich in March and the Swiss seem to like it. People are quite surprised when they taste Starbucks for the first time that it measures up to the expectation they have of what great coffee should taste like.

In terms of the store design and the feeling of the store, every store is subtly different but there is a common thread to all of them, and that will be the same throughout Europe.

**What about food?**

**Schultz:** Food is probably the area that is customised the most. In all of the markets in which we operate, we don't cook anything or bake anything ourselves. We sub-contract that to vendors and the same will apply in Europe.

**What about ancillary activities and the company's attempts to sell products unrelated to coffee?**

**Schultz:** A year and half ago we made a series of investments that were wrong and it's important to note that I led these decisions. We invested in other businesses to give us the opportunity to expand to a more broad-based business selling a wide range of products via the Web. We

quickly realised that it was probably the wrong thing to do.

We took our medicine and wrote them off and we are back where we were, with an Internet business which is based solely on Starbucks' own products, mainly coffee. The aim now is to support our stores via the Web rather than produce an extra line of revenue. Our focus of attention is now solely on our core retail business. That includes a few non-coffee items like music CDs and books. Sales of these are being pursued at our European stores but not as much as in the USA.

**How important is external business, like sales to supermarkets, hotels, airlines, and so on?**

**If a government already provides health insurance then we have to find something else. My commitment is that we will find something else.**

**Schultz:** We have a very large wholesaling business in North America, but that's a function of being there for so long, where the brand equity and products we have developed is sought after. So we have restaurants, department stores, airlines and grocery stores selling our coffee and that has given us the number one share in America. A few hotels sell Starbucks coffee as a branded item on their menus in the UK but it is a very small business as yet.

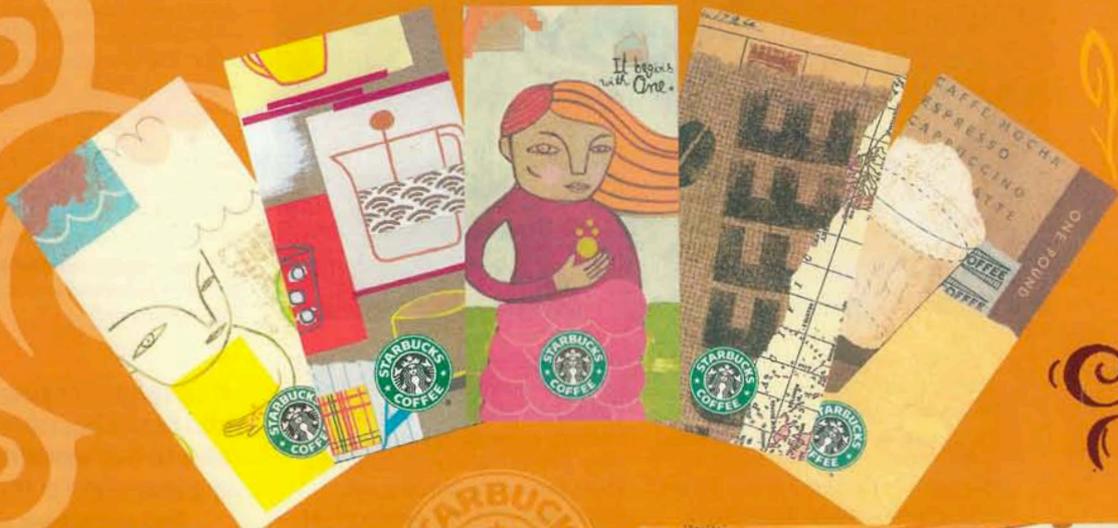
We have said publicly that we are interested in extending those businesses outside of America but not until we have a strong retail base. In a sense, we would prefer that our customers experience Starbucks first in our stores than from a product on a shelf. So we will have the discipline and the patience to wait. But we will come with those products in the future.

**Your success in the USA has meant that you have been very influential on European companies and a lot of significant competitors have emerged, particularly in the UK. That has pushed up property prices and generally made it a lot tougher to make money in the coffee bar business.**

**Does that make Europe a more uncertain and risky proposition?**

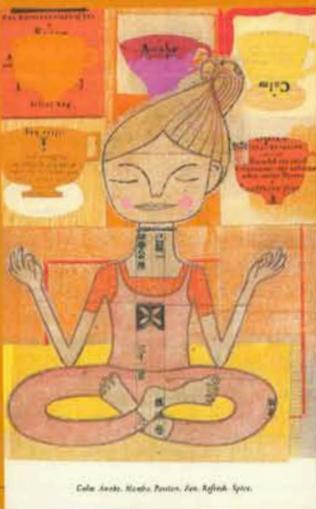
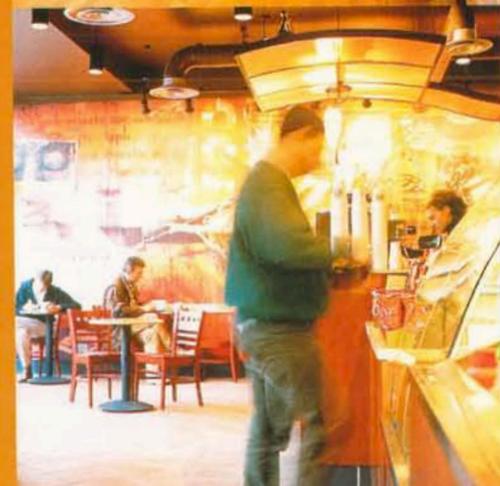
**Schultz:** It may surprise you to hear me say this but I think it's very healthy for

# Coffe Champion



It's taken less than 20 years for Howard Schultz to become a major figure in global foodservice. He brought powerful weapons to the task: vision, attention to detail, leadership and an intense focus. A New York childhood scarred by poverty and insecurity gave him the motivation to build a business with exceptionally high levels of employee involvement, helped by such innovations as stock ownership and the provision of medical insurance for all levels of staff. Schultz also laid down a corporate policy of philanthropic contribution (to causes such as literacy) and a declared stance on ethical issues (such as sustainability initiatives in bean growing regions of the Third world). These and other people-friendly aspects – especially a near-fanatical espousal of product

quality and integrity – single Starbucks out as a 1990s 'new age' brand like Ben & Jerry's and Snapple but not seen in older foodservice concepts. These values have undoubtedly helped the chain work its way into a wider consciousness than other foodservice chains, yet without the massive expenditure on media advertising on which virtually all other international foodservice operators have been forced to rely.



Colin Arndt, Nicola Panton, Zan, Agfish, Lynn



Jess, Colton, Blinn, Chazrael, Country, Ryan, Tobi, Selby

■ ■ ■ Schultz Sayings\* ■ ■ ■

**Trust**

In 1959, 90 per cent of the US public seeing a TV ad for a well-known product like Proctor & Gamble's Ivory Soap believed it was true. Since then, so many promises have been broken in all walks of life that the public's confidence had by 1999 sunk to an average of 6.5 per cent. Trust has been fractured at almost level. We have overcome this by looking inward. The Starbucks story is not about advertising, promotion or marketing – it's about our culture and values and the relationships we have built with our people. Trust is the underlying foundation of being in the retail and restaurant business. If you build trust with your customer he or she is going to come back. It's not about trends – trust is not a trend.

**On profit sharing**

1988-89, Starbucks became the first US company to provide stock options and health insurance to all employees, including the 65 per cent who were part-timers. It was put in place when the company was losing money and sceptics said staff would not understand the value of the options. Schultz's reply: Great companies endure because they value their people. Success is only really great when you share it with others.

**Staff retention in foodservice**

(Commenting on average annual staff attrition in US foodservice of 300 per cent). How can you possibly build trust and confidence with your customer if every single day you have people behind the counter who don't know what they are doing. Starbucks claims the lowest rate of attrition of any US foodservice company in our industry...not because we are great people but because we have demonstrated our heart.

**Reward sharing**

There is no more precious commodity than the relationship of trust and confidence a company has with its employees. If people believe management is not fairly sharing the rewards, they will feel alienated. Once they

start distrusting management, the company's future is compromised.

**Meeting expectations**

The essence of our success is not the coffee, or access to capital, or real estate: it's the culture, the values, it's getting big and staying small, maintaining our intimacy with our people. We cannot exceed the expectations of our customers unless management first exceeds the expectations of the employees.

**Experts**

Because of our total lack of international experience, we called in blue chip consulting firms, at tremendous expense, to study our prospects in Japan. They told us to change everything from 'to go' coffee to our no smoking policy. We stuck to our convictions and ignored all their advice... Since 1996 we have opened approximately 700 stores outside of North America.

**European coffee traditions**

We come to the Continent of Europe with tremendous respect for its wonderful history of coffee houses. We don't come here to displace that but to offer something different. Success is not an entitlement; it has to be earned every day. Our success in America is not going to mean anything in terms of our acceptance and any kind of success we hope to have here.

**Competitors**

Schultz's idealistic approach to business has not stopped him from being tough on competitors – notably in aggressive real estate siting – and ruthless in pursuit of workforce productivity (through early investment in information technology which matched part-time and full-time staff closely to the most profitable trading periods). Highlighting the "mistakes we didn't make" in his book 'Pour Your Heart Into It', Schultz accuses competitive coffee chains of such weaknesses as:

- not raising sufficient money to finance growth
- franchising too early and too widely

- losing control of quality
- insufficient investment in systems and processes
- hiring the wrong people
- choosing poor locations through being over-eager to grow
- failing to learn from bad experiences and losses.



**Vertical integration**

Total control of all aspects of operation, from coffee production onwards, has been a cornerstone of the Starbucks corporate culture, to a greater extent than any other branded foodservice or food retail business. The reason, says Schultz, is that coffee can so easily be ruined at any point from its production to its consumption: "We are so fanatical about quality control that we keep the coffee in our hands every step of the way from the raw green beans to the steaming cup."

**Franchising**

In the early days, we had little competition and the competitors which did grow by franchising never developed a strong brand. And by offering stock options, we were able to generate in-house even more enthusiasm and sense of ownership than franchise owners bring to their businesses. To me, franchisees are middlemen who would stand between us and our customers.

\*adapted from comments made in Howard Schultz's speech at the Internorga 2001 foodservice conference and also in his book 'Pour Your Heart Into It'.

*The speech on 'The Starbucks Story' held by Howard Schultz at the Internorga foodservice conference in Hamburg is available on CD or MC (price: €25) and can be ordered by fax (+49.69.7595-1510) or eMail (christine.haeuser@dfv.de).*

Starbucks to see all these young entrepreneurial coffee places open up and thrive. It demonstrates that there is a very strong market with consumers willing to try something new.

It also demonstrates that the market is changing and evolving, which will, I think, give us great traction. At the end of the day, all those businesses have tried in different ways to take a page out of Starbucks book but they are not authentic. They are not Starbucks and you won't get that in Europe until we open up.

**So the global strength of the brand will be the core of future development?**

**Schultz:** The brand is certainly the name on the door and the name on the cup but it's not what people are buying. They are buying the quality of the coffee and they are coming in and experiencing something that is quite unique which is brought to life by our staff. I think people all over the world recognise the difference between the leader and the follower. We hope to demonstrate that here soon.

**We want partners who are entrepreneurs and who also understand and value people.**

**You introduced some very significant innovations to US foodservice when you started Starbucks, notably stock options and health insurance for staff. But are these so significant in Europe?**

**Schultz:** I believe we were the first American company to provide equity in the form of stock options to UK employees, both part-time as well as full-time. In terms of other benefits, what we have to do is find the relevant benefits that enhance the relationship between our employees and the company. Every country will be different in terms of what the laws and regulations will allow us to do, but I think we will continue to seek ways in which Starbucks can, in effect, become the employer of choice and create benefits that are very different from other companies.

I don't believe that we would be successful today if we had not done that in America. We have to find other ways of doing things in other countries that are relevant to the practices of the country.

**One criticism of the idea of stock options for coffee bar staff is the nature of the work and the fact that staff will not typically stay with the company for a long time. One estimate puts the average stay at just 18 months. Is that really long enough for the stock options to have a value?**

**I don't think franchised chains are built to last.**

**Schultz:** Well, you have to be with the company at least six months to qualify and then there is a vesting period of 20 per cent per year over five years. We have thousands of Starbucks people who have had vested stock options, and the stories are wonderful in terms of what's happened, whether it's a vacation, a first home, a car or a college education. It's given us a wonderful feeling that we have been able to provide these things to people who without the stock options would not have been able to have them.

**What about health benefits, which are already widely available to employees in Europe?**

**Schultz:** If the government already provides health insurance then we have to find something else. My commitment is that we will find something else.

**You've had a very hands-on role since the early days of Starbucks. What is your role within the company now?**

**Schultz:** After being CEO for 18 years, I have, over the last year or so, changed my responsibility in the company to reflect the importance of growing and developing the international strategy, specifically Europe.

That change has been coupled with the fact that at my side for the last 11 years has been someone in whom I have had tremendous confidence. I promoted Orin Smith to president and CEO and he now runs the company. In my role as chairman and chief global strategist, I am spending the majority of my time in the strategic development of international business with the immediate focus on the sequencing of the partnerships we developed in Europe.

**You differ from many foodservice figures in being the person who created**

**the business and then managed it to become a billion-dollar business. What drives you to stay with the business?**

**Schultz:** I've had the unbelievably good fortune of being surrounded by people with much more experience and skill than I have. Looking at the last ten years I think I can claim the insight to give them responsibility to do the things that they do and make me look good. So it's been an unbelievable journey and it's still going.

**How many hours do you work per week?**

**Schultz:** Probably north of 60, which includes a lot of travelling.

**For someone in charge of a very high profile business like Starbucks, you yourself appear to have a relatively low profile, at least in the popular media. Do you avoid the limelight?**

**Schultz:** I try to maintain a low profile but I have done some things recently which might change that, like buying a basketball team. Before that, I tried to buy a baseball team but, as things turned out, it wasn't for sale. I love baseball and with two young children who are involved in sports it was a unique opportunity, so I thought I would give it a try.

**Your children are not old enough yet but would you like to see them go into the Starbucks business?**

**Schultz:** No, I don't think either one will be in this business and I don't think it's a healthy thing for them to do so. I don't want them to have a sense of entitlement and I think it's important that they find their own way.

**What is your favourite drink?**

**Schultz:** It varies but espresso macchiato, I guess. Also, I really enjoy coffee from a French press at home.

**I think people all over the world recognise the difference between the leader and the follower.**

**What about food?**

**Schultz:** I love sushi. I have been eating a lot of Japanese food lately, probably because a great Japanese restaurant has just opened where I live. I also like Thai food but what I like best is to eat food at home. We still try and have dinner every night together, when I'm home, because I think that's really important. ■



FRONTLINE

# Coffee Bars: All Europe



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One of the fundamental commitments of Food-Service Europe & Middle East is to cast more light on the European away-from-home landscape and its numerous market segments. And this is something we aim to do time and again, to provide you, professional players from the food-service industry and associated sectors, with unparalleled stock of knowledge via facts, market data and analyses covering not only national markets but the scene as a whole from an international perspective. Indeed, this has been our aim from the very first issue with our regular Pan-European Surveys, the Top 111 Sales Ranking of Europe's biggest foodservice players, etc.

● **Now, in this issue, another highlight**, a première: the first ever pan-European overview of the 55 biggest brands in the coffee-bar segment, listed by outlet numbers.

Of one thing, there can be no doubt: the coffee-bar segment has been one of the fastest-growing parts of the European away-from home market for around half a decade. Naturally, we are talking here about modern coffee bars that embrace elements of both the Mediterranean product world and US lifestyle. Thus, Starbucks is the international benchmark for the innovative use of a traditional product field, which has resulted in a new kind of operation with new and modern benefits that are frequently summarised under the heading 'third place'. It was this contemporary adaptation that launched the incredible career of caffè latte & co. And they, in turn, have proved to be an inspiration for many other product fields that are not necessarily related – not only ice cream, cakes and dairy products but also shampoos and shower gels. Even fashion designers are more than happy to borrow from the nomenclature of coffee specialities to name their latest creations, from mocha to cappuccino.

● **The young concept category of coffee bars** certainly has much to offer in the way of first-class learning material, e.g., about positioning premium gastronomic products, about the consumer soul, about conceptual elasticity. A fascinating field, especially since McDonald's entered the market with its McCafé concept and an obvious determination to play a leading role here, too. Nevertheless, the names of the leading players in Europe are (still) Tchibo, Starbucks and Costa Coffee.

## VIEWPOINT

# Why Wasn't Starbucks a European Invention?



The editors  
Gretel Weiss (GW)  
Marianne Wachholz (MW)

Dear Reader, this is the first of four editions of FoodService Europe in 2000, with which we aim to extend our pan-European reporting on the foodservice sector. Yes, consumer preferences and consumption profiles, product trends and brands, design and (in terms of their acceptance) concepts - even recipes - are more interchangeable than ever before. The younger the generation, the more this holds true. From New York to Barcelona and Berlin, the kids all want the same. They listen to the same music, they wear the same fashion brands, like the same cult products and figures. Today, they are separated by little more than their native languages. And even this barrier is falling at an amazing rate: English is well on its way to becoming the unrivalled universal language. Innovative, young concept ideas are spreading at an almost just-in-time pace from country to country and from continent to continent. The pan-European analysis in this issue offers an illuminating example of this and takes the comparative magnifying glass to coffee bars: a subject on which many are pinning their hopes. Not to be mistaken for the old fashioned coffee houses typical of Vienna, the coffee bars that have sprung up throughout Europe's metropolises are modern, uncomplicated and cosmopolitan formulas that reflect the spirit of the times. In almost all cases, they are oriented towards multiplication and many of them have made a fair degree of progress in this direction. One thing they all have in common is that (contrary to appearances) they offer not only gourmet coffees and bakery snacks but also a lifestyle message, an identification model. David Bosshart (see p. 36ff) speaks of "myths and cults - the intangibles which have priority". But that's not all. Another common factor: more or less all acknowledge their debt to an important prototype: Starbucks. What makes this so attractive is the fact that we are, in a certain sense, dealing here with a re-import. After all, a man called Howard Schultz found his inspiration for a coffee bar chain back home in USA

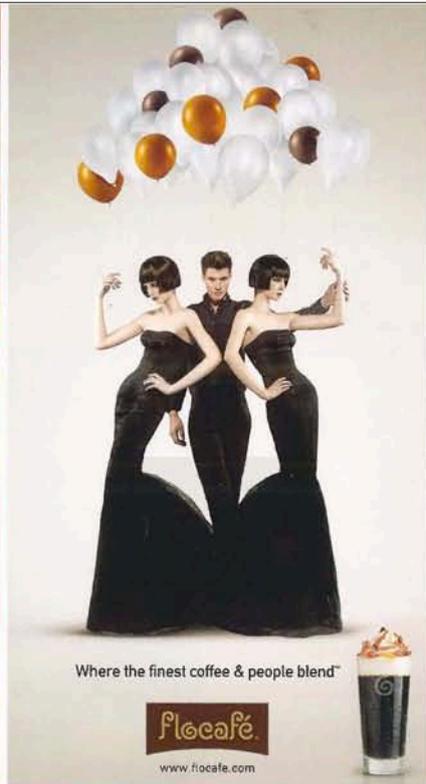
during a stay in Italy. Which marked the beginning not only of one of the most breathtaking success stories in the foodservice sector and the creation of a completely new market segment but was also, moreover, the spark that ignited the current coffee bar boom in the Old World. And so it was that - after an excursion into the New World, where they were restyled and enriched with aromas and, above all, a pinch of marketing power - they returned to Europe: ... cappuccino, espresso, caffè latte, macchiato and all the rest. Naturally, all clothed in new concepts tailored specifically for young urban consumers. Without doubt, there is also common ground with the related concepts launched by Italian coffee roasters: Caffè Lavazza, Segafredo Bar. In these cases, the emphasis is on marketing the origins, on authenticity and on the modern Italian way of life. However, the decisive impulses for growth are coming from the other side of the Atlantic.

So, there we are, we Europeans, a folk blessed with enormous culinary expertise and experience. Plus a vast stock of inherited product cultures. However, we all-too-rarely break out of the prison of tradition. "Why wasn't Starbucks a European invention?" asks David Bosshart provocatively. Why not? Because it needs a considerable amount of impartiality to dramatise and rejuvenate an everyday accessory (which coffee is throughout Europe) and make it into the future star of a new concept. America's greatest strength is its yearning for things new. Plus the laid back - and sometimes disrespectful - way of dealing with conventions of all kinds. This is not only true of speciality coffee. Pizza home-delivery is a similar case. A classic product 'made in Europe' plus innovative sales systems made in the USA: a powerful alliance providing internationally successful foodservice ideas. Thus, it is more than likely that an increasing number of markets worldwide will emerge from making use of this dual concept.

For all readers of FoodService Europe who will be in Hamburg/Germany for the Internorga, 17 - 22 March, 2000: Welcome to Café Future. Together with partners, we will be running this hospitality lounge for the restaurant industry for the fourth time. Join us for a discussion and, of course, a bite of finger food and a drink. We are looking forward to seeing you there - in the middle of the main entrance. Further information on the fair and congress - see page 76/77.



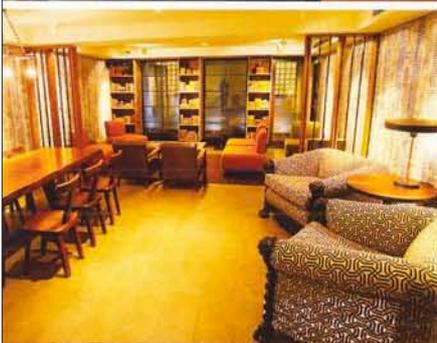
## 3 Brands with Over 1,000 Outlets Each



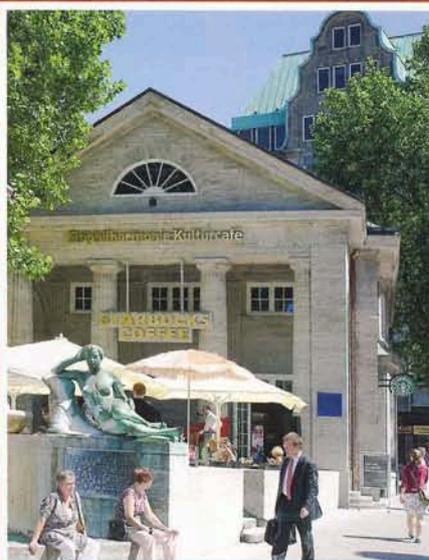
For the fifth time, we present a ranking of the top European coffee bar players. 70 brands with a total of more than 9,420 outlets – and 3% unit growth in twelve months. For the first time, three brands boast over 1,000 units. Two of them, Costa Coffee and McCafé, were last year's main growth drivers, while market leader Starbucks closed stores throughout Europe. In the past decade, coffee bars were expansion leaders on the European foodservice market. Though store growth was somewhat curbed in 2009, performance was still very positive compared with other market segments.



## 3 Brands with Over 1,000 Outlets Each



▲ Following the introduction of a 'loft-style' unit in Conduit Street, close to London's Oxford Circus, over 100 Starbucks coffee bars in the UK and Ireland are to be radically renovated during 2010 as part of a programme costing £24 m. At these and at 30 planned new stores, more individual designs will move away from the existing 'identikit' corporate look.



The impact of coffee bars on the entire European foodservice market has been matchless. Since the late '90s, an ever increasing number of new names and players has entered the European coffee bar scene. Among them many large corporations with the capacity to expand rapidly. They introduced the concept of public living room and thus added a new dimension to the traditional foodservice market which thitherto mainly focused on dining experiences. And there is yet another transformation under way: coffee shops are becoming favoured WLAN hot spots for (high school) students and business people alike thus gaining in importance as public workplaces. What we see is a new coffee drinking-culture for many millions of European consumers. Coffee bars are part of the quick-service world. They sell ten-minute breaks from the hustle and bustle of everyday life.

# 3 Brands with Over 1,000 Outlets Each

## COFFEE BARS

For more and more people they provide a daily treat. Selling an experience, not something needed, is part of the premium price package.

Over the past decade, the way people drink coffee has been revolutionized: large bowls and glasses have replaced small traditional cups, but coffee shops have also pushed coffee-to-go thus showing consumers (and other foodservice operators) the way towards on-the-go consumption. Other fundamental shifts included: from beverage to lifestyle seller, from hot drink to a drinkable snack (the borderline between eating and drinking has become very blurred), from breakfast & co. to 24-hour use.

When it comes to size and location, coffee bars are incredibly flexible. Solo or in a shop-in-shop format, they can find a place for themselves almost everywhere.

However, apart from the current economic crisis, that has slowed expansion in 2009, current coffee bar operators face another big challenge: the ever more competitive market demands differentiation. In order to win and keep customers, brands must distinguish themselves in the perception of the consumer. Uniqueness is key in terms of offering as well as brand design and identity. At the same time, the recession is driving consumers to question their habitual behaviour. They have reduced their luxury spending habits, exhibiting a new price-sensitivity instead. Hence, value-for-money offers have become an inevitable tool for keeping up or increasing footfall.

### Top 70 players

- The ranking lists 70 names with altogether 9,429 units in Europe. Exactly 3% unit growth in twelve months (2008: +16%, 2007: +21%). Topping the list are five extremely differently positioned brands



from five countries of origin: Starbucks/USA; Costa Coffee/UK; McCafé/Australia; Tchibo/Germany, and Segafredo/Italy.

- World-market leader Starbucks is also the market leader in Europe with a presence of 1,294 units (-9) in 19 countries. Over half of all their European stores are in Great Britain.

- 3 brands with over 1,000 units! Strongest growth comes from Costa Coffee (+195 units) and McCafé (168), who have cemented their positions among the top 3 and are quickly moving up to Starbucks.

- Year with mixed expansion trends: 39 brands reported additional store openings, 19 brands with negative growth.

- Unit growth: the leader in absolute

### Where From?

Brands	Country of Origin
13	Spain
12	Germany
7	UK
5	Netherlands
4	Poland
3	Sweden, Russia, Australia
2	Turkey, Switzerland, Greece, Austria
1	USA, Norway, Latvia, Ireland, France, Finland, Denmark, Canada

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terms is Costa Coffee with 195 new points of sale, followed by McCafé with 168 new units (117 of them in Germany alone) and Coffeelight (+26).

In relative terms, the Dutch DE Koffie Café (owned by Douwe Egberts) leads with growth of 40%. It is followed by Turkey's Kahave Dünyası (+34%) and the Spanish chain Café Café (+32%)

- The most widely distributed are Segafredo (35 European countries), McCafé (21), and Caffè Ritazza.

- The 70 brands originate from 20 countries, which means a very broad spectrum of birthplaces for a top ranking. Spain accounts for 13 of the 70 names, Germany for 12, the UK for 7 and the Netherlands for 5.

- Of 70 players 8 are present in ten countries or more. 38 are single-market-players only present in their country of origin.

### Top 12 in profile

**1. Starbucks.** The world number 1 is also the leader in Europe. After several years of strong unit growth (2008: +31%), 2009 was a year of consolidation. In the course of the international restructuring programme prescribed by Chairman and CEO Howard Schultz, Starbucks closed numerous coffee houses all over the continent. The European no. 1 market. Great Britain, saw the most drastic cuts: 44 units less than in the previous year (now: 671). Europe wide the company's store count totalled 1,294 (-1%) in 19 countries. Market entry 2009 in Poland (3 units). In Great Britain and Ireland, Starbucks is planning to implement a new individually adapted loft-style design in over 100 stores. In the 2009 fiscal year (end: 28 September) the company generated global sales of US\$9.8 bn (-6%) from 16,635 stores



Espresso House



### Most Distributed\*

R	Brand	Country of Origin	No. of Countries '09	('08)
1	Segafredo Zanetti Espresso	Italy	35	(33)
2	McCafé	Australia	21	(16)
3	Caffè Ritazza	UK	20	(16)
4	Starbucks	USA	19	(14)
5	Illy Caffè/Espressamente	Italy	16	(17)
6	Coffeeshop Company	Austria	13	(13)
7	Gloria Jean's Coffees	Australia	12	(10)
8	Costa Coffee	UK	10	(13)
9	Tchibo*	Germany	8	(10)
10	Wayne's Coffee	Sweden	8	(7)

\*in Europe

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## 3 Brands with Over 1,000 Outlets Each

### COFFEE BARS



(11,128 USA, 5,507 international) in over 50 countries. During the same period, sales from existing operations fell by 6%. Operating income rose from US\$504 m to 562 m and net earning from US\$315.5 m in the fiscal year 2008 to 390.8 m in 2009. Objective for 2010: moderate single-digit sales growth led by accordingly positive same-store-sales.

**2. Costa Coffee.** With 195 new units, the British coffee chain (owned by Whitbread) is determinedly heading toward segment lead. Total store count in Europe: 1,175 (worldwide: 1,495 in 27 countries), 1,058 of which are located in the UK where the chain is numerically larger than Starbucks. New countries entered in 2009 included Hungary and Portugal. Top 3 European countries in terms of turnover: UK, Ireland, and Greece. In the 2009/2010 financial year, Costa reported sales in UK

and overseas franchise units up 35.8% to £203 m. Like-for-like sales were up by 5.3%. When this magazine went to press, Whitbread was currently trying to buy the

#### Expansion 2009

- Reduced expansion speed due to financial crisis, economic insecurity, and financing difficulties.
- Consolidation and maintenance of existing outlets have priority over expansion.
- Among the top 10: 3 players with double-digit growth, 4 with negative numbers (UK + Russia)
- Most store closures in Great Britain, Spain and Russia – the countries that were among the hardest hit by the crisis.



### 2009: Top 70 Coffee Bar Players in Europe

R (08) Brand	Company	http://	No. of Units <sup>1</sup>	vs. '08	Country of Origin	EC <sup>2</sup>
1 (1) Starbucks	Starbucks	<a href="http://www.starbucks.com">www.starbucks.com</a>	1,294	-1%	USA	19
2 (2) Costa Coffee	Whitbread	<a href="http://www.costa.co.uk">www.costa.co.uk</a>	1,175	20%	UK	10
3 (3) McCafé	McDonald's	<a href="http://www.mcdonalds.com">www.mcdonalds.com</a>	1,081	18%	Australia	21
4 (4) Tchibo*	Tchibo	<a href="http://www.tchibo.com">www.tchibo.com</a>	820	3%	Germany	8
5 (5) Segafredo Zanetti Espresso	Segafredo Zanetti Worldwide	<a href="http://www.segafredofranchising.com">www.segafredofranchising.com</a>	435	4%	Italy	35
6 (6) Caffè Nero	Caffè Nero Group	<a href="http://www.caffenero.com">www.caffenero.com</a>	397	1%	UK	2
7 (7) Caffè Ritazza	SSP International	<a href="http://www.ritazza.com">www.ritazza.com</a>	250	-11%	UK	20
8 (13) Coffeeright	Gregorys Foodservice	<a href="http://www.gregorys.gr">www.gregorys.gr</a>	247	12%	Greece	4
9 (9) Coffee House	Hirutdinov	<a href="http://www.coffeehouse.ru">www.coffeehouse.ru</a>	201	-9%	Russia	2
10 (10) Shokoladnica	Kolobov	<a href="http://www.shoko.ru">www.shoko.ru</a>	195	-4%	Russia	2
<b>Total units Top 10</b>			<b>6,095</b>	<b>6%</b>		
11 (11) Hema Koffiebuffet	Lion Capital	<a href="http://www.hema.nl">www.hema.nl</a>	195	3%	Netherlands	3
12 (14) Illy Caffè/Espressamente	illycaffè	<a href="http://www.illy.com">www.illy.com</a>	164	3%	Italy	16
13 (17) Café & Té	Compañía del Trópico Café y Té	<a href="http://www.cafeandte.com">www.cafeandte.com</a>	149	3%	Spain	1
14 (15) Coffeeshop Company	Schaerf	<a href="http://www.schaerf.at/coffeeshop">www.schaerf.at/coffeeshop</a>	144	2%	Austria	13
15 (18) Coffee Republic	Coffee Republic Trading Limited	<a href="http://www.coffeerepublic.com">www.coffeerepublic.com</a>	126	2%	UK	3
16 (12) BB's Coffee & Muffins	BB's Coffee & Muffins	<a href="http://www.bbscoffeeandmuffins.com">www.bbscoffeeandmuffins.com</a>	112	-40%	Australia	2
17 (19) Gloria Jean's Coffees	Gloria Jean's	<a href="http://www.gloriajeans.com">www.gloriajeans.com</a>	100	0%	Australia	12
17 (20) Wayne's Coffee	Wayne's Coffee	<a href="http://www.waynescoffee.com">www.waynescoffee.com</a>	100	8%	Sweden	8
19 (16) Jamaica Coffee Shop	Grupo Rodilla	<a href="http://www.jamaicacoffeeshop.es">www.jamaicacoffeeshop.es</a>	91	-2%	Spain	3
20 (23) Flocafé	Vivartia	<a href="http://www.goodys.com">www.goodys.com</a>	90	3%	Greece	4
20 (32) Cafés Valiente	Grupo Cafento	<a href="http://www.cafesvaliente.es">www.cafesvaliente.es</a>	90	5%	Spain	1
20 (21) coffeeheaven*	coffeeheaven Int.	<a href="http://www.coffeeheaven.eu.com">www.coffeeheaven.eu.com</a>	90	0%	Poland	7
23 (29) Espresso House	Espresso House Sweden	<a href="http://www.espressohouse.se">www.espressohouse.se</a>	82	17%	Sweden	1
24 (24) Il Caffè di Roma	Lavazza	<a href="http://www.ilcaffediroma.com">www.ilcaffediroma.com</a>	72	-20%	Spain	5
25 (26) Lacino	Lacino (previous Tchibo Mobil)	<a href="http://www.lacino.de">www.lacino.de</a>	70	0%	Germany	1
<b>Total units Top 25</b>			<b>7,770</b>	<b>4%</b>		
26 (41) Kahve Dünyası	Kahve Dünyası	<a href="http://www.kahvedunyasi.com">www.kahvedunyasi.com</a>	59	34%	Turkey	1
27 (33) Insomnia Coffee	Insomnia Coffee Company	<a href="http://www.insomnia.ie">www.insomnia.ie</a>	58	9%	Ireland	1
27 (34) Lino's Coffee Shop	Lino's Coffee	<a href="http://www.linoscoffee.com">www.linoscoffee.com</a>	58	12%	Italy	1
29 (66) Empik Cafe	EM&F Group	<a href="http://www.emf.pl">www.emf.pl</a>	57	12%	Poland	1
30 (28) Robert's Coffee	Robert's Coffee	<a href="http://www.robertscoffee.com">www.robertscoffee.com</a>	55	2%	Finland	5

\*estimated <sup>1</sup> as at end of 2009 <sup>2</sup> presence in European countries

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## 3 Brands with Over 1,000 Outlets Each

### COFFEE BARS

2009: Top 70 Coffee Bar Players in Europe							
R (08) Brand	Company	http://	No. of Units <sup>1</sup>	vs. '08	Country of Origin	EC <sup>2</sup>	
31 (25) Café de Indias Coffee Shop	Grupo Rodilla	<a href="http://www.cafedeindias.com">www.cafedeindias.com</a>	51	-16%	Spain	1	
32 (36) Cafes Caracas	Union Industrial del café	<a href="http://www.cafesunic.com">www.cafesunic.com</a>	50	0%	Spain	1	
33 (38) Kanne	Gastro Kanne	<a href="http://www.kanne-gruppe.de">www.kanne-gruppe.de</a>	49	2%	Germany	1	
34 (31) Testa Rossa caffèbar	Testa Rossa caffè	<a href="http://www.testarossacaffe.com">www.testarossacaffe.com</a>	47	-11%	Austria	8	
35 (35) Columbus Café	Columbus Café	<a href="http://www.columbuscafe.com">www.columbuscafe.com</a>	46	-12%	France	3	
35 (39) Double Coffee	DC Holding	<a href="http://www.doublecoffee.lv/eng/">www.doublecoffee.lv/eng/</a>	46	0%	Latvia	5	
35 (65) Ital Caffè	Ital Caffè Coffee Company	<a href="http://www.italcaffe.com">www.italcaffe.com</a>	46	-2%	Spain	1	
38 (27) Plantaciones de Origen	Grupo Cafento	<a href="http://www.cafferovi.com">www.cafferovi.com</a>	45	25%	Spain	2	
39 (22) Puccino's	Puccino's Worldwide	<a href="http://www.puccinos.com">www.puccinos.com</a>	43	-52%	UK	1	
40 (37) AMT Espresso	AMT Coffee	<a href="http://www.amtcoffee.co.uk">www.amtcoffee.co.uk</a>	40	-20%	UK	4	
40 (45) Esquires Coffee Houses	Esquires Coffee International	<a href="http://www.esquirescoffee.co.uk">www.esquirescoffee.co.uk</a>	40	14%	Canada	2	
42 (43) Bagels & Beans	Bagels & Beans	<a href="http://www.bagelsbeans.nl">www.bagelsbeans.nl</a>	39	3%	Netherlands	1	
43 (40) Lavazza Caffè Espresso Bar	Lavazza	<a href="http://www.lavazza.com">www.lavazza.com</a>	38	-14%	Italy	1	
44 (44) Baresso Coffee	Baresso Coffee	<a href="http://www.baresso.dk">www.baresso.dk</a>	37	0%	Denmark	2	
44 (-) Café Café	Grupo Areas	<a href="http://www.areas.es">www.areas.es</a>	37	32%	Spain	1	
46 (54) chicco di caffè	chicco di caffè	<a href="http://www.chicco-di-caffe.de">www.chicco-di-caffe.de</a>	36	20%	Germany	1	
47 (47) Coffee Fellows	Coffee Fellows	<a href="http://www.coffee-fellows.de">www.coffee-fellows.de</a>	35	9%	Germany	1	
48 (49) Bracafé	Germán de Erasquin	<a href="http://www.bracafe.com">www.bracafe.com</a>	34	6%	Spain	1	
48 (50) Pause-Café/Xpresso-Café	Pause-Café	<a href="http://www.pause-cafe.ch">www.pause-cafe.ch</a>	34	10%	Switzerland	1	
50 (51) Kaldi Koffie en Thee	Kaldi Koffie en Thee	<a href="http://www.kaldi.nl">www.kaldi.nl</a>	33	6%	Netherlands	2	
51 (46) Balzac Coffee	Balzac Coffee	<a href="http://www.balzaccoffee.com">www.balzaccoffee.com</a>	32	-9%	Germany	1	
52 (48) Caffè Spettacolo	Valora Holding	<a href="http://www.kgroup.ch">www.kgroup.ch</a>	32	0%	Switzerland	1	
53 (59) Meyerbeer Coffee	Coffee M Beteiligungs GmbH	<a href="http://www.meyerbeer-coffee.de">www.meyerbeer-coffee.de</a>	31	15%	Germany	1	
54 (52) World Coffee	World Coffee Company	<a href="http://www.worldcoffee.de">www.worldcoffee.de</a>	30	0%	Germany	1	
54 (53) Coffeehouse by George	Coffeehouse by George	<a href="http://www.bygeorge.se">www.bygeorge.se</a>	30	0%	Sweden	1	
54 (55) Café Crown Cafe	Café Crown	<a href="http://www.cafecrown-cafe.com">www.cafecrown-cafe.com</a>	30	0%	Turkey	1	
57 (30) Coffee Primo	Welcome Break	<a href="http://www.welcomebreak.co.uk">www.welcomebreak.co.uk</a>	29	-57%	UK	1	
57 (42) Cup&Cino	Cup&Cino	<a href="http://www.cupcino.com">www.cupcino.com</a>	29	0%	Germany	3	
57 (56) Primer Express	Grupo Cafento	<a href="http://www.cafferovi.com">www.cafferovi.com</a>	29	0%	Spain	3	
57 (57) iCoffee	RUCH S.A.	<a href="http://www.icoffee.pl">www.icoffee.pl</a>	29	4%	Poland	1	
57 (69) Cafe Club	Contel Sp. Z o. o.	<a href="http://www.cafecclub.pl">www.cafecclub.pl</a>	29	32%	Poland	1	
62 (-) DE Koffie Café	Douwe Egberts	<a href="http://www.de.nl/dekoffiecafe">www.de.nl/dekoffiecafe</a>	28	40%	Netherlands	1	
63 (58) Café Opus	Umoe Catering	<a href="http://www.cafeopus.no">www.cafeopus.no</a>	26	-7%	Norway	1	
63 (63) Coffee Company	Coffee Company	<a href="http://www.coffeecompany.nl">www.coffeecompany.nl</a>	26	4%	Netherlands	1	
65 (64) sfcc	San Francisco Coffee Company	<a href="http://www.sfcc.de">www.sfcc.de</a>	25	9%	Germany	1	
66 (68) Cafetiero	Stockheim/Hagacon	<a href="http://www.cafetiero.de">www.cafetiero.de</a>	24	4%	Germany	1	
67 (70) Club del Cafés Novell	Cafés Novell	<a href="http://www.cafesnovell.com">www.cafesnovell.com</a>	23	5%	Spain	1	
68 (67) Coffetoon	Sistema BIT-2000	<a href="http://www.coffetoon.ru">www.coffetoon.ru</a>	22	-8%	Russia	1	
69 (62) Aromas de Dakar	Take Out Coffee	<a href="http://www.aromasdedakar.com">www.aromasdedakar.com</a>	21	-19%	Spain	1	
69 (-) aran	Aran	<a href="http://www.aran.de">www.aran.de</a>	21	11%	Germany	1	
<b>Total units Top 70</b>			<b>9,429</b>	<b>3%</b>			

\*estimated <sup>1</sup> as at end of 2009 <sup>2</sup> presence in European countries

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age sales). 820 units (520 in Germany alone), 3% growth. 2009 withdrawal from the British market.

**5. Segafredo.** A very early mover focussing on an Italian-style coffee experience. The espresso bars were launched in 1988. With outlets in 35 European countries, the brand is the most widely distributed of all in the top 70 list. 435 stores in Europe (+4%). More than 100 units in Ger-

many. Top 3 European countries in terms of turnover: Germany, Austria, France.

**6. Caffè Nero.** Established in 1997, the company achieved 9% store growth in 2009 (2008: 14%). Revenue growth: 10%. Top 3 European countries in terms of turnover: UK, Turkey and UAE. In 2009, Caffè Nero opened its first unit outside of Europe in Dubai Mall. The brand emphasizes authentic Italian atmosphere and

bean blend with exclusive music and hand-made sandwiches.

**7. Caffè Ritazza.** Format for airports, rail stations and roadside catering sites – operated by the food travel experts SSP. Most units in UK, France and Spain. 250 units in Europe (-32), worldwide: 333 (-43) in 20 countries. New in Abu Dhabi.

**8. Coffeeright.** For the first time among Europe's top 10 coffee bar concepts. The



## 3 Brands with Over 1,000 Outlets Each



Coffee House



Wayne's

Greek brand owned by Gregroy's now counts 247 units in Greece, Romania, Cyprus and Albania.

**9. Coffee House** is the largest coffee chain in Russia. Due to the recession, the market segment, which used to grow 20-25% annually, slowed down in

2009. Accordingly, Coffee House consolidated its business. Total store count 2009: 201 (-9%). 119 units in the Moscow area. The company also operates other brands in Russia and the Ukraine: Asia Café, Vinegret Café, Moscow Café.

### COFFEE BARS

#### ■ ■ ■ Top 10 Growth '09 ■ ■ ■

R	Brand	Growth relative	Growth in %
1 (62)	DE Koffie Café	40	
2 (26)	Kahve Dünyasi	34	
3 (44)	Café Café	32	
4 (57)	Cafe Club	32	
5 (38)	Plantaciones de Origen	25	
6 (46)	chicco di caffè	20	
7 (2)	Costa Coffee	20	
8 (3)	McCafé	18	
9 (23)	Espresso House	17	
10 (53)	Meyerbeer Coffee	15	

absolute	in units
1 (2)	Costa Coffee 195
2 (3)	McCafé 168
3 (8)	Coffeerecht 26
4 (4)	Tchibo 20
5 (26)	Kahve Dünyasi 15
6 (5)	Segafredo Zanetti Espresso 15
7 (23)	Espresso House 12
8 (44)	Café Café 9
9 (38)	Plantaciones de Origen 9
10 (62)	DE Koffie Café 8

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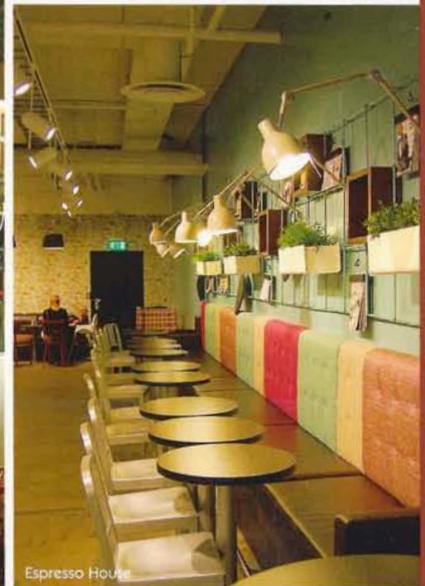
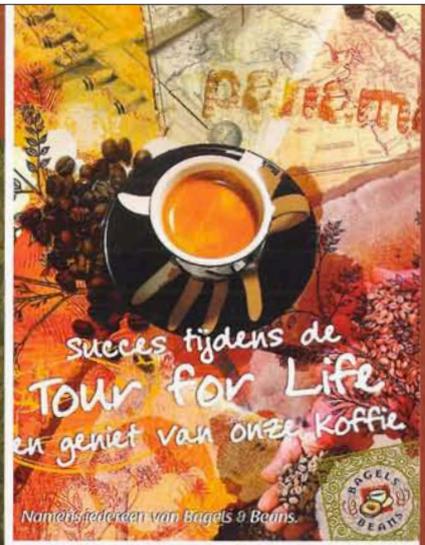
Melitta SystemService, D-32429 Minden, Germany  
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e-mail: export@mss.melitta.de, www.melitta.de/mss

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## 3 Brands with Over 1,000 Outlets Each

### COFFEE BARS

BESSER FRÜHSTÜCKEN BEI COFFEE FELLOWS



Due to the radical restructuring program prescribed by chairman and CEO Howard Schultz in the difficult business year 2008, the number of Starbucks stores in Europe decreased by 0.7% in 2009. Store count by the end of the year: 1,294 in 19 countries. The European no. 1 market, Great Britain, saw the most drastic cuts: 44 units less than in 2008 (now: 671). Germany (-1) and Turkey (+11) asserted their positions among the top 3 Starbucks countries in the Old World. Major joint-venture partners in Europe: the Greek Marinopoulos Group (Greece, Cyprus, Romania, Switzerland, Austria, and Bulgaria) and Spain's Vips (Spain, France, and Portugal). Numerous units were also closed in Australia and the US, more are to follow in 2010.

### Starbucks Europe

— Markets by Units 2003-2009 —

R	Country	Start	Jan '03	Jan '04	Jan '05	Jan '06	Jan '07	Jan '08	Jan '09	Dec '09
1	UK	09/98	334	384	434	481	528	616	715	671
2	Germany	05/02	12	29	37	48	75	113	142	143
3	Turkey	04/03	—	6	17	33	62	90	116	127
4	Spain	04/02	7	20	31	56	58	71	79	74
5	Greece	09/02	4	15	30	41	52	70	75	68
6	France	01/04	—	1	8	20	30	41	48	53
7	Switzerland	03/01	14	16	19	23	31	37	45	47
8	Russia	08/07	—	—	—	—	—	2	9	29
9	Ireland	08/05	—	—	—	2	9	18	27	23
10	Austria	12/01	7	9	8	9	11	11	13	11
11	Cyprus	12/03	—	1	3	7	7	9	9	9
12	Romania	09/07	—	—	—	—	—	2	6	7
13	Netherlands	2007	—	—	—	—	—	2	3	6
14	Denmark	2007	—	—	—	—	—	3	2	2
<b>Total Europe</b>			<b>378</b>	<b>481</b>	<b>587</b>	<b>710</b>	<b>863</b>	<b>1,085</b>	<b>1,303</b>	<b>1,294</b>
<b>Middle East &amp; Africa</b>				<b>122</b>	<b>143</b>	<b>176</b>	<b>216</b>	<b>236</b>	<b>299</b>	
<b>EMEA Total</b>				<b>709</b>	<b>853</b>	<b>1,039</b>	<b>1,301</b>	<b>1,539</b>	<b>1,593</b>	

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**About the  
Spanish Branded  
Restaurants Chains  
and some Concepts  
to Watch**

**4**



Con independencia de la aparición de información sobre el foodservice español en los Surveys ya comentados, la programación de la revista siempre contó con reportajes especiales de la restauración de marca en España, bien para un relato global de ella, bien para aspectos particulares; como podrían ser informaciones icónicas de la publicación: sandwiches, coffee bars o casuals restaurants, bien por la singularidad de las tapas españolas o de ciudades como Barcelona o Madrid.

Incluso en las secciones habituales de la revista, Hot Trends y Concepts to Watch, siempre había ocasión para que, en la época analizada, determinados restaurantes que estaban de moda en España o que representaban un concepto determinado, que la Redacción quería destacar, pudieran aparecer

junto y entre el resto de los seleccionados, de otras capitales europeas.

No cabe duda de que, en años donde España era reconocida internacionalmente por su cocina creativa de vanguardia, hubiera un lugar también para destacar a otros emprendedores y empresas, en el contexto europeo, es de agradecer.

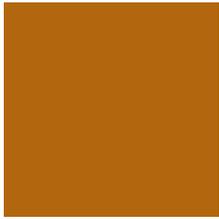
FSE primero y FSE&ME después, siempre quiso que en sus páginas hubiera noticias de España, fuera de la restauración de marca o de la independiente.

A continuación, se detallan una selección de los reportajes aparecidos durante la etapa considerada, así como de las menciones de empresas, entidades o venues que se recogieron en las secciones comentadas.

### Índice de artículos y reportajes\* sobre Foodservice en España

Fecha de Aparición	Título	Contenido
1999	Great Growth Potential for Chains	Restauración de Marca
1999	Fun&Foodservice	Parques temáticos
2000	Cosmopolitan Barcelona	Barcelona
2001	Mediterranean Fast Food Goes Global	QSR
2002	From Spain to the World	Restauración de Marca
2002	Madrid Mucha Movida	Restaurantes en Madrid
2002	Fullsteam Ahead for Sandwichs	Bocadillos y Sandwichs
2004	Cultural Meeting Pot	Event Catering
2004	A Love Affair:Spain & Coffee Bars	Coffee bars
2004	Spain Coffee&Casual ascendant	Coffee Bars
2005	Spain: A very Healthy Foodservice Market	Foodservice
2005	Between Tradition and Trends	Foodservice
2006	Impeded PassionFoodservice	Restauración de Marca
2006	Spain: Award Winning Hot Concepts 2006	Premios a Restaurantes
2007	Fast Food Icon Revented	Fast Good de F. Adriá
2006	Chefs who wants to Change the World	Alta Cocina
2008	Catching the Spirit of The Times	Rodilla-Tapelia-Frescco
2009	On the Move with Pinchos& Tapas	Tapas Bar
2010	Pizza Pasta Perfect	Pizza y Pasta

\*Estos artículos pueden solicitarse a: [www.dfv-archiv.de](http://www.dfv-archiv.de)



**Selección de empresas de restauración de España , o venues, cuya ficha fue editada en la etapa 2000-2010 en las secciones Hot Trends ó Concepts to Watch.**

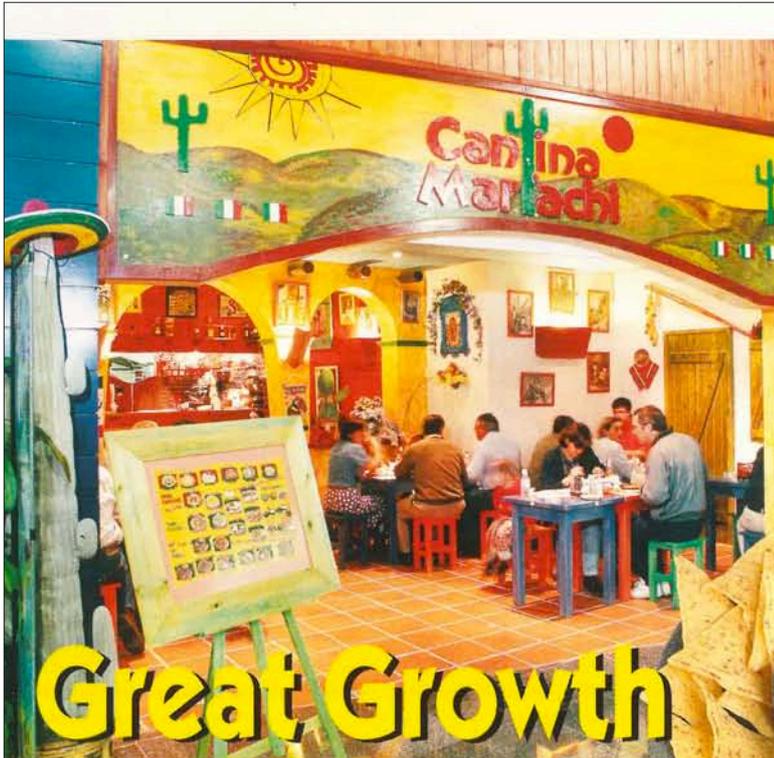
Acceder a su conjunto clicando **fichastowatch**

Fecha de aparición	Empresa/Venue	Empresa/Venue	Empresa/Venue	Empresa/Venue
2002	City Limits	Coque		
2002	Bopan	Tati	Fortuny	Up&Down
2003	Cinco Jotas	Cuina del Ampurdanet		
2003	Viena	Café&Te	El Tenorio	Café de la Rambla
2004	Tapelia	Sandwichs&Friends	Fast Good	
2004	El Corte Ingles	Elephant Barcelona	Mugaritz	
2005	Sugar	Galería Gastronómica	Submarino	
2006	Ferrá Adriá			
2006	Movie	Fish	Wagaboo	
2006	Semproniana			
2007	Hammans	Hotel M. de Riscal	Vinoteca Torres	Vinya-Roel
2007	Areas	La Capilla de la Bolsa	Mercado de la Reina	
2009	La Xina	Donner Kebap	Piscolabis	
2010	Gastromium	QuQu	La Panza es Primero	

Se incorporan a este capítulo, textos completos de los siguientes artículos:

- 1999 "Great Growth Potential for Chains"
- 2002 "Madrid mucha movida!"
- 2005 "Between Tradition and Trends"
- 2009 "On the Move with Pinchos y Tapas"

# Great Growth Potential for Chains



SPAIN

tional catering, etc., in 1975. 20 years later, in 1995, this figure had jumped to 25 %, i.e., more than doubled.

And, although traditional catering still dominates, it is gradually losing ground for two main reasons:

- a rapid process of entrepreneurial concentration is taking place in the field of commercial catering, which is becoming increasingly dynamic through modern chains: fast-food, theme restaurants and cafés in shopping centres.

## Great Growth Potential for Chains

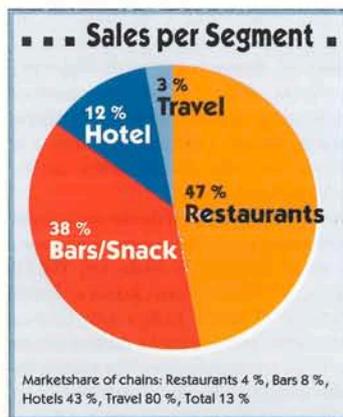


Spain – and all the experts agree on this – is one of the few countries offering really good perspectives for the chain-restaurant industry over the next ten years: significantly better than, for instance, in Italy. The population has an extremely positive attitude to American influences. Global and domestic restaurant brands are gaining rapidly in significance and market shares, especially in the fast-food sector. A structural contribution by Mario Cañizal Villarino, Manager of the Spanish Association of Modern Chain Restaurants, Barcelona.

- a fast shift from self catering to contract catering is taking place in the field of institutional catering.

The Spanish commercial foodservice sector consists of 224,500 catering facilities – from bars to restaurants – which makes it one of the country's most important economic sectors, buoyed up by the enormously significance of the travel industry. The bulk of operations are traditional. In other words, independent family businesses.

At present, chains account for just 4 % of all restaurants and 8 % of the bar trade. In the hotel and travel segments, the story is quite different. In this case,



The new living, consumption and leisure habits of millions of Spaniards are breaking radically with the traditional models of the Iberian Peninsula.

- The
- integration of women in working life
  - increased mobility between the home, work and leisure venues
  - more leisure time in general and
  - greater purchasing power
- have resulted in an increasing shift from in-house to away-from-home consumption.

The Ministry of Agriculture (MAPA) provides the following statistics: on average, 12 % of all household expenditures were spent in restaurants, cafés, bars, institu-

### ■ ■ Commercial Foodservice '97

	Stores	Meals/Year in million	Sales in € billion
Restaurants	61,900	703	8.8
Bars/Snack	152,300	1,239	7.1
Hotels	9,000	92	2.2
Travel	1,300	78	0.5
<b>Total</b>	<b>224,500</b>	<b>2,212</b>	<b>18.7</b>

# Great Growth Potential for Chains

## SPAIN

**Typically American concepts have found a warm welcome in Spain.**

systems hold market shares of 43 and 80 % respectively. Overall, chains hold 13 % of the market; traditional, non-system operations, 87 %.

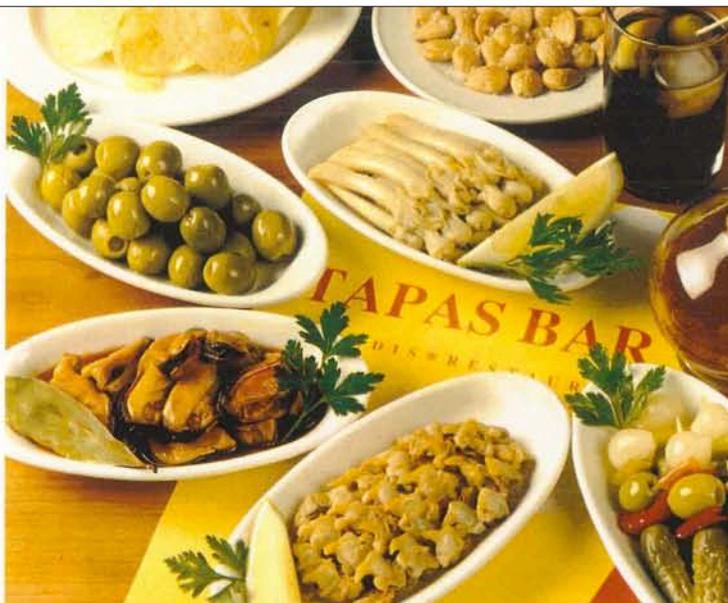
Within the multi-unit business sector (= chains), the number one company holds 19 % of the market; the top ten companies 70 %.

The predictions up to 2005 for modern catering, especially fast-food, are extremely positive.

Yes, fast-food is the driving force of the Spanish catering market. There were already more than a thousand outlets in 1996, which supplied a total of 184 million meals and generated revenues of approx. € 626 million (excluding VAT). In this segment, chains hold 76.6 % of the market. Generally speaking, they focus on:

- hamburgers,
- pizzas,
- sandwiches (bocadillos) and
- grilled chicken.

Although hamburger-



ers and pizzas were, so-to-say, the midwives of this branch of the catering industry, the bocadillo chains are the outlets with the highest growth rates. The reason? The high degree of acceptance accorded to them by Spanish consumers because the assortments offered are mostly typical Spanish products and, in the majority of cases, are

ment has emerged onto the catering stage: tapas restaurants, which are currently all the rage in Barcelona. They are a Spanish version of the quickservice

### Fast-Food 1994-1998

	Sales in € million* (Stores)	
	'94	'98**
<b>Chains</b>	<b>333.9 (604)</b>	<b>614.9 (963)</b>
Hamburger	201.3 (242)	322.7 (327)
Pizzas***	17.4 (75)	23.5 (103)
Sandwiches	64.1 (161)	188.5 (417)
Chicken	19.1 (57)	33.0 (76)
Others	31.8 (69)	47.2 (40)
<b>Independents</b>	<b>141.4 (326)</b>	<b>150.0 (299)</b>

\*excl. VAT \*\* most of them estimated \*\*\* excl. delivery

### Top 10 Chains in Spain

Rank	Company	Sales € million (Stores)		
		'98*	'97	'97-'98
1	TelePizza	336.6 (544)	238.2	+ 41 %
2	McDonald's	270.4 (176)	213.3	+ 26 %
3	Sigla-Group	153.4 (79)	138.2	+ 11 %
4	Burger King	105.1 (157)	87.1	+ 20 %
5	Tricon (PH/KFC)	90.7 (126)	77.9	+ 16 %
6	Pansfood	84.1 (173)	55.9	+ 50 %
7	CENESA	50.5 (98)	45.1	+ 12 %
8	Bocatta/Pokin's	51.1 (101)	43.0	+ 18 %
9	Foster's Hollywood	24.0 (27)	21.6	+ 11 %
10	Farggi-Group	22.2 (40)	21.3	+ 4 %

\* most of them estimated



also based on typical concepts:

Pans & Company and

Bocatta are the leaders in this segment and are only surpassed by the major international hamburger and pizza chains. However, caution is the watchword here, too, because the roots of the pan-European delivery company TelePizza are to be found in Spain.

Since the mid-nineties, a new seg-

recipe: customers are offered a selection of small 'raciones' (tapas rations), which they can mix, as well as classic and regional Spanish dishes. And all this within the space of an hour for the low price of 1,000 - 1,500 Pts (€ 6 - 9). Naturally, the concept could also be grouped into the field of theme restaurants. Typically, however, they operate using fast-food technology and expand via franchising. Some groups (Sagardi, Lizzaran and Tapas Bar) are already active on the international scene.

Turning to the field of theme restaurants, typically American concepts have found a warm welcome in Spain, i.e., TGI Friday's, Chi-Chi's, Tony Roma's. Purely Spanish (Foster's Hollywood, Cantina Mariachi) and European themes (Buffalo Grill) are popular, too. The market has also accepted the development of bake-off/convenience chains, such as Dun-



# Mucha Movida



Madrid City Guide

## Mucha Movida

Madrid: the lively capital at the heart of Spain is still much more traditional than the avant-garde, daring and Europe-embracing Barcelona, both in concepts and foodwise.

But a more cosmopolitan attitude has become clearly evident since the late 90s: alongside the genuine old-style restaurants, flamenco taverns and traditional bars, more and more ethnic and neo-hippie bars are opening up, as well as upscaled tapas-and-wine locations, also with a lighter, international cuisine. "La mesa es una fiesta" (eating is a party) is the motto everywhere. Because going out means more than just filling the stomach to the madrileño on the lookout for fun. Eating is communication. Flirting. Pleasure. And they like to have fun: starting with the 'cortado' first thing in the morning, then a break about 11, 'almuerzo' between 2-4 p.m., and 'cena' between 9-11 p.m., right up to the 'fiesta' in the middle of the night, always 'taking in' 3 or 4 bars. Madrid is movida. The city never sleeps.



# Mucha Movida



## A very successful mix

17 brands, about 170 operations, 90,000 guests per day and €246 m sales in 2001 mean that the Grupo Vips (formerly Grupo Sigla) is one of the top three food-service players in the Spanish market. The star of their portfolio is Vips ❶. Born in 1970, this mixed café-restaurant-retail (newsagent, confectionery, toys) concept has been copied 49 times so far (40 in Madrid, otherwise elsewhere in South and East Spain) and brought in €102.2 m turnover in 2001. The aim is to have 80 outlets open across the whole of Spain by 2004. The stores are open 365 days a year from 9 a.m. until 3 a.m., best-selling items are the breakfast 'Andaluz', quesadillas y nachos, Caesar salad and Texas burger. Further concepts owned by the group are Gino's Pasta & Pizza (47 units), Starbucks (3 units) and their newest concept Laeñe (traditional Span-

ish dishes). The aim is to expand the portfolio by a further 120 outlets by 2004.

[www.grupovips.com](http://www.grupovips.com)

## Fine-dining as in 1839

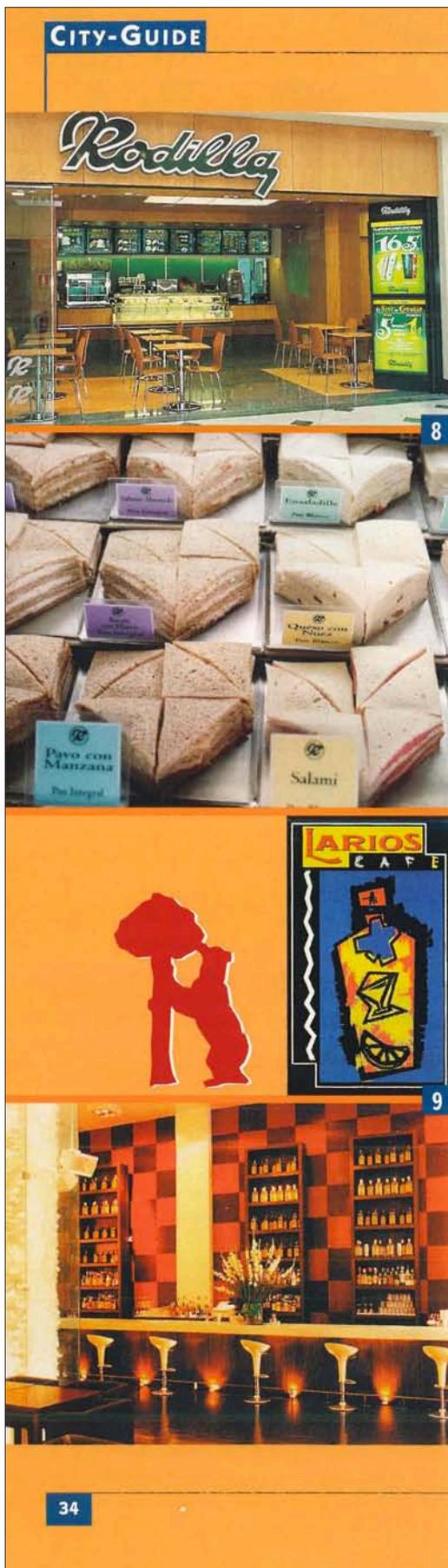
1839: Spanish romanticism is blossoming, and Emilio Huguenin opens the Lhardy ❷ in the shade of the Pta. del Sol. Later, it is extended to form a restaurant and sold to the head pastry cook. Three generations on, his descendants are still running this historic jewel of a business. The charmingly old-fashioned café-pâtisserie on the ground floor still exists (including clear soup in a samovar) - and history is still alive on the upper floors with seating for 130 guests as well. Whether you choose the salón Isabelino, the salón privado, blanco or japonés - the original embossed leather wallpapers are still hanging everywhere, as are the red velvet curtains and brass chande-

liers. "History has always been made here, presidents and kings have eaten here," says manager Javier Pagola. The cuisine used to be French, but now it is top class Spanish. Best-seller? Cocido madrileño (a stew). The average check is €45, and the turnover is about €2 m, about 30% of which is made by retail sales (including deliveries).

San Jerónimo 8, tel. +34 91 522 22 07

## A Catalan in Madrid

Now Spanish hotel chains are also increasingly trying to set up high-profile restaurants in their hotels as magnets - principally to attract custom from non-patrons. A successful example of this strategy is the Sant Celoni ❸ opened in March 2001 in the Hotel Hesperia: three-times Michelin star chef Santi Santamaría prepares neo-classical Catalan cuisine for up to 80 guests (50 seats) in these minimalist-modern premises with



## CITY-GUIDE

### Rodilla

rustic details, and warm colours and materials. A love of the raw materials provided by Mother Earth is the hallmark of the 7 hors d'oeuvres, 7 meat and fish dishes (€19-42) and 7 desserts, accompanied by a selection of 300 wines (60-70% of them Spanish). There are lots of business people at lunchtime, and in the evening guests with more time to enjoy themselves - and to spend more. The average check is about €102.

Paseo de la Castellana 57, tel: +34.91.210 88 40,

[www.restaurantesceloni.com](http://www.restaurantesceloni.com)

### Systematised fast casual tapeo

It was not until October 1999 that the multiconcept specialist Food Service Project (formerly Zena Grupo de Restauración) - with brands such as Burger King, Pizza Hut and Fosters Hollywood the second largest foodservice company in Spain after McDonald's - bought the 39 Cañas y Tapas outlets from the Sanmiguel Brewery - and now they already have a good 60 operations (mainly franchise). The aim is to expand to 120 outlets by 2004. A fast casual version of the traditional is offered in the 150-200 sq.m. outlets in 1a locations (average investment €300,500) - with a laid-back interpretation of local colour: solid wood tables, tiled bars, large windows looking out onto the street. Many of the more than one hundred centrally pre-produced home-made-style dishes are served in pans and tureens ready to be shared. The bar:restaurant ratio is 40.7:59.3%, F:B 56.6:43.4%, and the turnover per store is €600,000-650,000 (25% for beer alone). 250 meals are served each day and there are 500 checks at the bar, where a tapa is served free with every drink: Caña (beer) + tapa = €1.2.

[www.tapaspain.com](http://www.tapaspain.com)

### Rooms with a view

It's as if time had stood still and Madrid were still a village. Thanks to its belle-époque decor, antiques and memories of Habsburg Madrid, many people consider the Café de Oriente, with a direct view to the Royal Palace, to be the oldest café in the city - however, it was not until 1982 that the priest Luis Lezama raised the status of this 300-year-old building to a renowned place to eat. In addition to the terrace, very popular with both Spaniards and tourists, this location also has a café (90 seats), the cafeteria-tapas bar La Botillería del Café de Oriente (€27 average check), a fine-dining' restaurant

with seven salons which just have to be seen (max. 130 persons, €48 average check), a stylishly modern restaurant/bar/lounge El Aljibe del Café de Oriente (50 seats), and its own delicatessen, the El Obrador del Café de Oriente. All in all, a very appealing way of recalling the aristocratic era of the past.

Plaza de Oriente 2, tel: +34.91.54 71 564, [www.grupolezama.com](http://www.grupolezama.com)

### A culinary jewel

What started in September 1997 with only 10 tables in the c/Doctor Fleming has achieved its crowning glory since February 2000 in the Hotel Miguel Angel: the restaurant La Broche, run by the young star chef Sergi Arola (2 Michelin stars). The number of tables in the new location has not increased: the idea is to give the guests plenty of space and calm in the simple, modern interior in different shades of white. The menu consists of a selection of 15 modern Mediterranean dishes for between €14-51 which change 5 times per year. "Outstanding, imaginative", is what the Zagat Guide notes. The kitchen and the cellar are glassed in and all is open to view. "I think with my soul," says Sergi Arola, "and I want to surprise and emotionally move people with my dishes." The former scholar of the famous Ferrán Adriá issues a maximum of 90 bills per day and the average check is €85, with an F:B ratio of 60:40%. Sometimes the king pays a visit. Since May, there is also a La Broche in Miami.

c/Miguel Angel 29, tel. +34.91.399 34 37

### With womanising style

Yes: the Spaniards know what women want - and especially Benjamín Calles: the lighting in his two-storey upscale establishment No Do, opened in 1998 in the ground floor of an office building, is flattering to the looks, and the Mediterranean-Japanese cuisine is light. Women like it, so men like it too. "My concept with the open kitchen was very innovative for Madrid at that time," he comments. "My aim was to create a real destination, not only food-wise, but also in terms of the casual atmosphere." His idea of minimalism is the absence of anything unnecessary and in the interior styled in warm colours flowers and other elements set intelligent and emotional accents as well as on the Feng Shui garden terrace. Sushi and tunafish tataki with white garlic are best-sellers; prices are between €5-15, and the average check is about €30. Guests are cos-



Barcelona

# Between Tradition and Trends

It's beautiful. And proud. This Catalan capital and port Barcelona. Steeped in tradition and part of the international scene at one and the same time, both patriotic and cosmopolitan.

A city of tiny streets and magnificent Avenidas, distinguished by some of Gaudí's best works. A centre of attraction for both business people and tourists (on a budget). The gastronomy scene has been really vibrant in and around the Ramblas since the Olympic Games in 1992 gave a massive impetus to the away-from-home experience. The professional food-service market in town is currently dominated by some ten or so multi-concept players, who in culinary matters, draw less on the ethnic influences of other cultures than on the regional (and Mediterranean) tradition. Not so multi-cultural then, yet this leads to a greater variety of interpretations of ingredients and recipes 'de la tierra'. But if you are tempted to see the town merely as a rich vein for tapas fans and people with traditional tastes, you would be very wrong. Indeed, (design) trend scouts find it highly innovative. What of the future? More fast-casual, boom-time for the Raval, El Borne and Diagonal districts and boom-time too, product-wise, for bread and tapas. By Katrin Schendekehl.

### Magical. Mediterranean. Metropolitan.

Opened in 2003, **Attic 1** at Ramblas de Barcelona no. 120 is the latest and biggest operation belonging to AN Grup whose portfolio of tapas bars (Tapa-Tapa, Txapela), grill restaurants (Mussol) and modern, international concepts, such as Citrus, Daps and, indeed, Attic (to name but a few), have made owner Artemi Nolla the leading pioneer in the catering sector and one of Barcelona's trendsetters. All in all, his twelve restaurants (ten concepts) accounted for a turnover of some €40 m in 2004 and 550 employees. According to marketing & sales division manager David Romero they are aiming at €46 m for 2005 – thus reaping the rewards of the recently completed 'restyling' of many of the businesses. The Attic, with its 1,600 sq m and 260 seats has more to beguile the visitor than simply its terrace with a fantastic view of the main artery of the town. The "modern, cheery F&B offers at fair prices are every bit as persuasive as the urbane, magical design of architect Dani Freixes," says

## Between Tradition and Trends



Romero. Why have only the Mussol restaurants increased in number so far? "Because the Spanish fullservice guest lays great stress on the individual personality of a place as something to be savoured. Restaurant chains evoke an impression of standardisation. We systematise behind the scenes". Two new restaurants are planned to open in September.

Rambles de Barcelona 120, phone +34.93.302 48 66, [www.angrup.com](http://www.angrup.com)

### Fashion, fiction, fusion: key features of the up and coming El Borne district.

#### Sandwiches – in new packaging

No, we are not talking here literally about packaging. Rather about the context of the product in a wider sense. "It needs to be daring, innovative, youthful, cosmopolitan. Stylish and relaxed. Somehow different," recalls brand manager and co-owner Franxa Tomás. Just like the big mural by artist Jordi Labanda, which is now the dominant visual feature of all four stores of **Sandwich&**

**Friends** 2 – with up to 50 seats each. Opened in the El Borne district in 1999 the first outlet quickly became one of the 'in' places to be in town. Why? "Because we offer fast fullservice. And because our sandwiches are of higher quality and more creative than anywhere else." The menu lists 14 cold and 15 hot wraps (all bearing the Christian names of friends of the owners), 21 baguettes, nine double-decker sandwiches, as well as salads and small crispy pizzas. All are made to order using "good, fresh produce". The average bill comes to €15. The target group? Mostly youthful. Like the cool home page.

(Among others) Aribau 179, phone +34.93.200 45 95, [www.sandwichandfriends.com](http://www.sandwichandfriends.com)

#### The charismatic 'Fonda Catalana'

You arrive. You feel relaxed. Somehow you feel a little as though you were at home in the charismatic **Senyor Parellada** 3 with its elegantly enclosed patio in the El Borne district. The owner, Ramón Parellada, son of a famous Catalan family of gastronomes, and the unmistakable driving force behind this thoroughly successful overall creation, has been paying homage, with an almost philosophical zeal, to the traditions of the locality as well as to those of the region for more than 23 years in a Cuban colonial-

style building. So this fullservice restaurant, together with the attached (and beautiful) Hotel 'Bany's Orientals' is not merely the very epitome of the 'fonda catalana' which from time immemorial has welcomed the traveller with 'comida and cama', i.e. bed and board. To this are added typical Catalan dishes like 'Bacallà a la llauna' or 'Escudella i carn d'olla' which are served partly in classic form, partly updated, but always loving-

### ■ ■ ■ Please Be Aware that... ■ ■ ■

... Spaniards eat late. Fullservice restaurants often do not open before 1/1.30 pm for lunch, and in the evening, kitchen crews seldom work before 8/8.30 pm. What better reason for enjoying all the delicious snacks available!

... the average bill mentioned generally refers to 2-3 courses and a drink. A starter and a dessert are both part of a successful meal in Spain. 'La mesa es una fiesta' – A meal is a celebration.

... Barcelona is celebrating the 'Year of Food, Cooking and Gastronomy' from March 2005 to March 2006. The aim is to make both locals and foreigners aware of the rich culinary heritage of the city and its region. Many restaurants are going to include typical dishes on their menus for the occasion – and the Tourist Office is even offering guided walking tours around the most famous gastronomic high-spots, a 'Ruta de Tapas' as well as a trip to the 'Mercado de la Boqueria'. [www.barcelonaturisme.com](http://www.barcelonaturisme.com)

# Between Tradition and Trends

## CITY GUIDE



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of which 30 are served warm. And no-one who sees them so opulently presented on the bar can easily resist their magical charms. "Total impulse selling". The average bill at the (selfservice) bar is about €7; in the restaurant with waiter-service and its open, high quality (and, of course, equally original-Basque) cuisine an average meal will cost you around €45. The outlets of the follow-up concept at **Sagardi 4** (currently nine) offer a somewhat simpler formula with more emphasis on the grill. Here, as there, a lively bar area dominates the scene while, in the dining area, robust natural materials such as wood and stone evoke the relaxed atmosphere of a Basque taverna. A tip for all those trying pintxos for the first time. Don't forget to collect the cocktail sticks. Why? Just go and see.

Irati: Cardenal Casañas 17, phone +34.93.302 30 84/Sagardi: Argenteria 62, phone +34.93.319 99 93, [www.sagardi.com](http://www.sagardi.com)

### Rice balls from the shoe shop?

... sounds unusual, is unusual and, for that very reason, is worth a look. The Camper family business is not short of ideas or resources: so when it came to transferring their cult brand to new territory in the student quarter Raval, they created what they call **FoodBall 5** – an excursion into the gastronomical world, which has been planned from the outset with environmental and socio-political principles firmly in mind. "Our concept is for all those who care about their bodies. And about our planet", says press officer Parsida Aboud. On offer at this outlet, which opened in May 2004, and alongside the imaginatively filled rice balls called 'bolas' (with fillings such as chickpeas, seaweed, anchovies) are healthy extras such as soup, dried fruit and sweet balls

made from carob beans. Can also be ordered as a 'set menu' (small: €5/medium: €6.5/large €9.5). Beverages include water, freshly pressed juice, coffee or (organic) beer. "Everything is organic, healthy, innovative and of the highest quality. A new model for casual food." The design is simple, the walls brightly painted – and customers eat not at tables but on large bench steps in an adjoining room. All very alternative, interesting and agreeable – but with a potential for operational improvements. No less exciting is the equally very individually designed Hotel Casa Camper, just a few steps away.

Elisabets 9, phone +34.93.270 13 63; [www.foodball.es](http://www.foodball.es), [www.casacamper.com](http://www.casacamper.com)

### Haute cuisine Catalan-style

He calls his cuisine "traditional Catalan with contemporary elements". And he evokes outbursts of joy from connoisseur and layman alike – and not only with his famous 'canelones tradicionales a la crema de trufas'. He grew up "between cooking rings" in the heart of a famous family of gastronomes. Today 57 year-old Carles Gaig, who is a virtually self taught master of (Catalan) haute cuisine, has worked his way up to become one of the top chefs in the country. And far beyond its borders, too. Since the end of 2004 his fine-dining destination **Gaig 6** has found a home on the first floor of the Hotel Cram – red and black are the dominant themes here in matters of presentation, harking back to a classicism 'in the modern sense'. "The table is an intimate stage. The guest is the star." And guests there are: some 55 at lunch and in the evening (this is the maximum seating capacity) – business people, connoisseurs, gastronomes. And 35 employees! To accompany the exquisite market-fresh cuisine Gaig's wife Fina Navarro and the team have more than 500 wines on offer. The average bill comes to €85, the F:B ratio is 75:25. His motto for living: "be true to yourself". And: "the food is as important as the honesty, pleasure and warmth of heart with which it is served." Worth seeing, too: the lounge area on the ground floor.

Aragó 214, phone +34.93.429 10 17, [www.restaurantsgaig.com](http://www.restaurantsgaig.com)

### The tapas workshop

Tapas aren't just tapas. There are regional differences, of course, variations in terms of quality and also of the emphasis given in the particular concept, each based on a variety of 'raciones'. So, the speciality in the **Taller de Tapas 7** is, above all else, fish

ly put together. The average bill is around €21. Reservation recommended. Also under his wing are: La Vinya del Señor and the traditional 7 Portes, just round the corner – as well as Pa amb Tomàquet, a "Catalan bistro concept".

Argenteria 37, phone +34.93.310 50 94

### A Mecca for pintxo fans

.... this is what the creators themselves, with some immodesty, call the small, ethnic, **Irati** which thrives on heaving crowds, with its hefty bar and the 30-seat restaurant area. Indeed: it opened in 1995 and can not only claim to have been amongst the pioneers of the Basque pintxo culture in Barcelona – selling per day up to 3,000 crusty breads with fresh seafood or roasted vegetable toppings (eaten with a cocktail stick), the concept "had a massive impact" from day 1, according to marketing director Enrique Urrutia. Their 'portfolio' contains 80 fresh, delicious little 'tapas from the Basque country',



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## Take a Break ...

... at Natural Break. Launched in 2002 and multiplied twelve times so far, this fast-casual concept of Grupo Areas is to be found at railway stations, Spanish and

Mexican airports as well as in downtown Madrid – and Barcelona. Here as everywhere: fast, healthy, fresh, natural food, made to order and 'a la vista' and also in part on offer in refrigerated display cabinets of various F&B 'islands' (fruit, juice, yoghourts, salads, hot food, coffee and sweet things). Added to this there is a small take-away retail section with sandwiches etc. The F:B ratio is 60:40. The main target group? "Women between 25 and 40 who do not have much time but who still want light, healthy meals," says marketing manager José Ramón Sánchez. The design is modern, friendly and open. The 500 sq m free

flow restaurant in the Ramblas (investment totalling €800,000) sees an average of 450 customers per day, with an average bill of €6.

Rambla Catalunya 66, phone +34.93.215 73 73, [www.areas.es](http://www.areas.es)



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and seafood, delivered every evening fresh to the two bars, which opened in 2003, and transformed by chefs in the tiny visible kitchen (called a 'taller' = workshop) into more than 50 authentic, tasteful, classic combinations. Everything is made by order. Their best-seller? 'Gambas de Palamós a la plancha' at €14.50. What is perhaps less 'classic' is the fact that the simple, comfortable and elegantly styled bars, with seats for 125 inside and 32 outside at the El Borne site, are larger than is generally the case. And they are open daily from morning to night non-stop, i.e. 'without siesta'. This pleases the ever-hungry tourists as well as the couple who own it, José Lombardero and Kate Preston. The average bill is reckoned to be over €20. That, too, beats much of the competition.

(Among others) Argenteria 51, phone +34.93. 268 85 59, [www.tallerdetapas.com](http://www.tallerdetapas.com)

### Rice on the move

The story begins with a couple of rice shops. And carries on with rice. Rice on the rise. And how! Why? Because Norberto Navarro and his business enterprise Arocerías de Alicante have devised an easy method for making paellas – plainly the palpable classic of Spanish cuisine. Since 2001 they have been preparing almost all their ingredients in the central workshop in Elda/Alicante.

**Many business people eat out twice a day. That has much to do with the enjoyment of 'being out and about'.**

The ingredients are then dispatched – and the paellas cooked – in all four corners of the country following the patented method and based on traditional recipes. And soon beyond its borders, too. 35 **Tapelia** 8 restaurants are planned as part of the network in Spain by the end of 2005; they currently number 25. The majority are (still) in the hands of franchisees. With 19 rice and three noodle dishes in a price range of €8.75-€22.5 the focus of food throughout the whole network is clearly centred on rice and paellas. As for wines, there are over 50 to choose from. The F:B ratio comes in at 80:20. The design of the 200-600 sq m outlets is typically Spanish, 'alicantish' even, i.e. with stone walls, wooden furniture, soft lighting – and a long 'arroz' bar with tapas and 'paellas robadas' for those in a real hurry. With investment totals averag-

### More to See\*

- **Fast Food/Fast Casual**  
Bocatta, Fresco, Fresh & Ready, Lactuca, Mussol, Pans & Co, Salta
- **Mercados** Boquería, Santa Catalina
- **Coffee bars** Caffè di Francesco, Central Cafe, Il Caffè di Roma, Jamaica Coffee Shop, Paul
- **Bakery** Bopan, Forn d'en Rosend, Forn de San Jaume
- **Fullservice** Balthazar, Basílic, Semproniana
- **Traditional** Can Travi, 7 puertas
- **Fine-Dining** Galería Gastronómica, Hofmann, Mirador in the Palau de La Música (Jean Luc Figueras)

\*a selection

ing €650,000, the average turnover throughout the network amounts to €1.7 m/store. The most ambitious expansion plans are afoot.

(Among others) Paseo de Gracia 15, phone +34.93. 342 81 88, [www.tapelia.com](http://www.tapelia.com)

### 18 brands, one philosophy

... a philosophy that might go something like: 'good, reasonably priced and cosy'. It's always a hit with the customers – what better indication of success could there be than the not infrequent queues in front of La Rita, Les Quinze Nits and La Mamasita. Or in front of La Fonda, the first concept of the Geshos Group, opened in 1992, to name but a few. All 18 concepts (twelve of which are in Barcelona) are brought together by modern, Mediterranean, market-fresh cuisine – and lunchtime menus at €8 as well as average bills of around €15-20 for three courses and a drink. Suitable for a wide range of customers and without any sense of being exclusive or precious. Interior design is invariably sensitive to the history and features of the rooms. And you really sense it. The most recent restaurant, this time not in the centre, is the **Market** 9 near the Mercat Sant Antonio: in spacious rooms flooded with light and with wooden floors, leather seating, 'gothic windows' and just a hint of Paris, the colourful and varied clientele (160 seats) are served contemporary food, once again in a relaxed atmosphere. Upstairs there is a hotel.

Comte Borrell 68, phone +34.93.289 01 30.

### XXL braseria – and 'mucho more'

The seven concepts of the Grup Cacheiro have many faces, each with a strong personality: brought into existence in 1994 with the tapas bar Ba-ba-reeba on the Paseo de Gracia, the group, under the lead-



ership of José Cacheiro, is now responsible for ten restaurants (two more – fast casual ones – will open in the near future) and a turnover close to €25 m. They are all 'players' in Barcelona – more precisely in the Barrio Gótico, Eixample and on the Avenida Diagonal -, they are all 'under a Mediterranean culinary influence' and they all maintain a high profile with high-quality design. Conceptually they range from the traditional El Gran Café to the urbane and sophisticated Telirium and the three Trobador outlets and to the large XXL 'braseria' **Tenorio** 10 which is economically the most successful concept, even though its design is a little dark and cool. With its 225 seats, it serves a daily clientele of 700 from its open and impressively efficient kitchen. In addition to 78 dishes on the 'standard menu' – including inventive fusion cuisine – there are 10-15 'platos del día'. The average bill is about €25, according to Head Chef Jaume Turón, with an F:B ratio of 70:30.

Paseo de Gràcia 37, phone +34.93. 272 05 92, [www.grupcacheiro.com](http://www.grupcacheiro.com)

### Foodservice in BCN

<b>Number of outlets</b>	10,993, of which 3,193 are restaurants and 7,800 bars/café
<b>Operator structure</b>	80% family operations
<b>Outlet age</b>	54% are less than 10 years old
<b>Popular locations</b>	L'Eixample, Ciutat Vella, Sant Martí
<b>Top times</b>	74% of revenues is generated before 4 pm
<b>Top days</b>	Fri./Sat.
<b>Top months</b>	July/Dec./Aug.
<b>Average bill</b>	restaurants €13.45, bars €6.72
<b>Average staff</b>	restaurants 8.6, bars/café 2.8
<b>Perspectives until 2007</b>	67.4% expect similar or increasing revenues; 19.7% expect them to fall

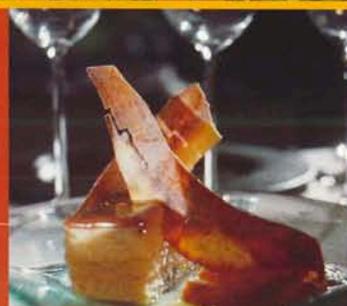
Source: Ayuntamiento de Barcelona, 2005. 999 of the city's restaurateurs were polled.



## A Powerful Woman with Powerful Brands and a Powerful Impact



*Alma mater of Grupo Tragaluz: Rosa María Esteva. Together with her son Tomás and daughter Sandra Tarruella – and, of course, many other people – she has created more than ten concepts over the last twenty years. Many of them have been awarded (inter)national design prizes.*



## Between Tradition and Trends

In purely quantitative terms, Grupo Tragaluz is just another multi-concept operator in the Catalanian metropolis, albeit an extremely successful one. In qualitative terms, however, the family company headed by Rosa María Esteva and her son Tomás Tarruella undoubtedly has the most sustained benchmark effect when it comes to design, as well as food creations and presentation. Each of the Group's ten foodservice concepts is an object lesson in how to create places with character and charisma that give guests room to breathe and the food a chance to develop, using only a few materials, colours and shapes, as well as cleverly placed accents and a sensitive use of (day) light. "Without doubt, our company's most important talent is our ability to create a unique ambience in which cuisine, decoration and design interact on the same hierarchical plane," says Esteva. No less important are the prices. "They should always be in perfect balance with the quality of the food and the venue." Only in this way is it possible to produce harmonious settings where guests feel at home. "We have always adapted our concepts to

**Profitability is the last thing I think about.**

the premises, i.e., their location and architecture, never the other way round. Everybody is different. As are restaurants. That's why I've no interest in simply multiplying a concept." And, without exaggeration: every one of her restaurants is different, individual and expressive – all are oases of relaxation and pleasure – and all are to be found in highly visible or prominent places in the city, preferably with a terrace and/or on the

seafront. All with a bar and all offering solid value for money. The latest addition to the portfolio is the interesting Hotel Omni with Restaurant Moo, Moodern Cocktail Bar, Bistro MooVida and Omm-Session Club. Modern and minimalist. But, at the same time, almost cosy and personal. At all events, it is different because the concept was not planned solely for hotel guests but also for locals. And this has been a

**What is my guiding light? Intuition.**

complete success. The ground floor of the cool but inviting 59-room hotel is currently one of the meeting places in the city. One of the reasons for this is the presence of the Roca brothers, three highly-rated chefs (Michelin stars), in the kitchen of this elegant but not (too) exclusive restaurant, not to mention the half portions and 'degustation' meals for €30 and €60 – on request with perfect wines for each dish. Already famous are the desserts perfumed with renowned fragrances – veritable symphonies of taste and aroma. The average bill comes to €65.

The future of the group? Visible signs are already to be seen in the expansion of the hotel and a market restaurant in the new Mercado Santa Catarina that will be opened in September. Also planned are a re-opening of the very first concept, Mordisco (which had to make way for the hotel) and a new hotel with restaurant – in Sevilla this time. What about the factors of success? Besides good management, above all: "That we firmly believe in what we do. And that we enjoy what we do. That's something guests notice."

Katrin Schendekehl



### ■■■ Concepts Made by Grupo Tragaluz ■■■

- **AContraluz (1997)** [www.acontraluz.com](http://www.acontraluz.com)  
Cuisine: fresh market food. Mediterranean interpretations of Catalanian cooking. Design: elegant, cosy, intimate, attractive (green/covered) terrace.
- **Agua (1997)** [www.aguadeltragaluz.com](http://www.aguadeltragaluz.com)  
C: fresh, simple seafood, rice dishes. D: quiet, warm, colonial-maritime terrace on the seafront.
- **Bestial (2002)** [www.bestialdeltragaluz.com](http://www.bestialdeltragaluz.com)  
C: fresh and Mediterranean. Focus on Italian products. D: minimalist and modern. Terrace garden by the beach.
- **El Japonés (1999)** [www.grupotragaluz.com/japones](http://www.grupotragaluz.com/japones)  
C: (fast) Asian. D: fresh and functional. Simple, minimalist but cosy.
- **El Principal (2000)** [www.elprincipal.es](http://www.elprincipal.es)  
C: modern. D: classic-elegant, exclusive and serious. Lots of daylight. Attractive private rooms for events.
- **Negro-Rojo (1999)** [www.negrodeltragaluz.com](http://www.negrodeltragaluz.com)  
C: Oriental-Mediterranean. Japanese. Fusion. D: modern, urban, fashionable, rich in contrasts.
- **Omm Hotel/Restaurante Moo (2004)** [www.hotelomni.es](http://www.hotelomni.es)  
C: traditional with a special touch. Michelin chefs. D: minimalist, lively, inspiring.
- **Tragarràpid del Tragaluz (1991)** [www.grupotragaluz.com/tragaluz](http://www.grupotragaluz.com/tragaluz)  
C: high-quality fast-food. D: informal, young, warm, dynamic.
- **Tragamar (in Girona; 1996)** [www.grupotragaluz.com](http://www.grupotragaluz.com)  
C: Mediterranean. D: cosy, colonial, terrace on the seafront.
- **Tragaluz (1991)** [www.grupotragaluz.com/tragaluz](http://www.grupotragaluz.com/tragaluz)  
C: creative, based on Mediterranean flavours. D: cosmopolitan, charismatic, elegant.





the fact that Sanz has never been to Japan. His cuisine is a mix of Mediterranean and Japanese – and that's what makes it so fascinating. The average bill comes to €50 and revenues are estimated by experts to be around €2.5 m. A second and a third restaurant are in planning while Sanz has already opened a take-away line called Kotobuki.

The prize for the Hot Concept Junior went to star chef Mario Sandóval for his

## Spain: Award-Winning Hot Concepts 2005

Spain's 'Restauración news' trade magazine awarded prizes to five extremely interesting foodservice players in different categories – most of them with multiplied concepts – at a congress in Madrid at the beginning of June.

The winner in the QSR category was **Jamaica Coffee Shop** – one of the first Spanish coffee-bar concepts (founded in 1994) and the current market leader with 150 outlets (most of them franchised) and revenues of

€38.8 m in 2004. The company is also active in Portugal and Andorra – and has its own coffee-roasting plant near Barcelona. 15 new openings are planned for 2005.

[www.jamaicacoffeeshop.es](http://www.jamaicacoffeeshop.es)

Singled out as the best casual chain was the **AN Grup** from Barcelona. The group's portfolio, which consists of tapas bars (Tapa-Tapa, Txapela), grill restaurants (Mussol) and modern inter-

**iboo** fast-casual concept (healthy, fast Mediterranean cuisine). 'Because, using his skills as a star chef, he has developed a concept that is suitable for franchising on the basis of products that are produced in a central kitchen and regenerated locally.' The menu encompasses almost 40 dishes, which are changed four times a year. The average bill amounts to approximately €15. At present, there are four iboo outlets in Madrid with plans for franchise stores throughout Spain in the near future. Also singled out for praise were the design of the outlets and the company's clever corporate communications strategy. [www.iboo.es](http://www.iboo.es)

And the Hot Concept Senior? **Grupo Lezama**, an important name on the foodservice scene – and not just in Spain. Thus, under the brand, 'Taberna del Alabardero', Father Luís de Lezama not only runs fine-dining destinations on the Costa del Sol and in Madrid (where the company also owns the renowned Café de Oriente) but also one in Washington (opened in 1989) and, with 'Arroz de María', a Mediterranean restaurant



national concepts, such as Citrus, Daps and Attic, has made proprietor Artemi Nolla the leading foodservice pioneer and trend setter in the Catalan metropolis. Particular emphasis was given to the design of the outlets. In 2004, the company stood for 12 restaurants (10 concepts), around 550 employees and revenues of €40 m. This year's revenues are expected to reach €46 m. (See also p. 36) [www.angrup.com](http://www.angrup.com)

The fine-dining category was won by the **Kabuki** sushi concept in Madrid. Opened by Ricardo Sanz in June 2000, this gem with just 45 seats is held in the highest regard as a Japanese restaurant – despite



focusing on rice dishes in Lisbon. Grupo Lezama was chosen for its social commitment (training and employment programmes for young people) and its early move into the US and European markets. [www.grupolezama.es](http://www.grupolezama.es)

Katrin Schendekehl



## On the Move with Pinchos and Tapas



# On the Move with Pinchos and Tapas

Four ethnic-cuisine fast-casual concepts, just under 400 outlets, around €200 m in sales: these are the hard facts of the Spanish Comess Group de Restauración. Despite the economic crisis, this franchise company is set on expansion – both nationally and internationally. The tapas formula Lizarrán is emerging particularly well, with initial try-outs in China and the USA.

[www.comessgroup.com](http://www.comessgroup.com)

As a recipe against the financial crisis the Spanish Comess Group de Restauración is banking on small snacks. On slices of baguette bread – the ‘foundation’ for often artistic, creatively tasty fillings, held together only by a toothpick: their name is pinchos. A traditional Northern Spanish snack. For lunchtime, evening, and in-between. With beer, with wine, hot or cold. And then there are tapas served in the homely ambience of a North Spanish tav-

ern. The name of this concept – which appeals to all incomes and ages – is Lizarrán. At the moment, it is not only ready to travel, but, in difficult times like these, given its “variety in prices and products”, it is thoroughly exportable, says Manuel Robledo, President of the Comess Group de Restauración.

June 2008 saw the opening of this formula’s first outlet in the USA, in Fullerton, California. “At the moment we are the only Spanish company with franchise outlets there.” In November, the concept was launched in China, too, in a shopping centre in Shinzou. Lizarrán has been found in

Andorra, Portugal and France for a long time (see box). Following a “fantastic launch” in the Far West and East, the system professionals are planning 30 further outlets in the United States over the next two to five years, though, given the proximity to Latin America, the potential “is more than ten times that.” Twenty more tapas bars are scheduled to join the network in China, five in Russia, and the Group is likewise looking to expand in France and Italy. The Group’s other brands are also set to develop further: there are plans to ‘grow’ the Mexican concept Cantina Mariachi by 5-6 outlets a year within Spain and to open further outlets in Russia (4), the Middle East (6) and Turkey (2). At present, a Master Franchisee is being sought for the UK – for both Lizarrán and the ‘fresh Mex casual & cantina bar’ concept. The Italian concept Pasta City is slated to increase by ten outlets a year within Spain, and Rock & Ribs (US food) by five. “There are strategic reasons why we shall be rolling out these concepts in the medium-term just nationally,” says Robledo.

Behind the Comess Group, along with Robledo and Luis Irissari (killed in an accident in 2004), stand two specialists in management and finance, who started as freelance corporate consultants in 1992, specialising initially in consumer goods and M&A deals. In 1997, though wholly strangers to the industry, they took over the ailing chain of Cafeterias California

### ■ ■ ■ Franchise Basics ■ ■ ■

– Lizarrán –	
Joining fee	€35,000
Franchise fee	6% of net sales
Advertising fee	2% of net sales
Average investment	€220,000
<b>A 2% franchise fee applies in the international market, whereas joining and advertising fees vary from country to country.</b>	

# On the Move with Pinchos and Tapas

## FAST CASUAL

### Comess Brands

and restructured this concept, which now belongs to Grupo Zena de Restauración. In 2003, following a capital increase and with the help of outside finance, they acquired Restmon, a chain likewise in financial difficulties, with its brands Cantina Mariachi, Pasta City, Rock & Ribs, Sykros and Sumo. Parts of the first three are being massively relaunched, the last two abandoned. In 2007, the purchase of Lizarrán completed the quartet of ethnic-cuisine concepts whose outlets now total 400 (+50 on 2007) and are worth around €200 m (+€30 m on 2007). "Our recipe for success? We have retained the best in each concept and given brand, system, profitability and dynamism a focal weighting equal to the quality of products and services," says Robledo. When it comes to the customer, this means high-profile brands with clear, authentic F&B and design messages.

The Comess Group de Restauración sees itself as "modern and happy to make decisions" and operates as a pure franchise business – apart from six stores, all units are run by franchisees, currently 210 national and seven international ones. The 45-member team at the head office not only ensure they gain both experience and purchasing benefits, while providing external facilities for many cooking processes, but also perform administra-

tion and marketing services for them. Every year 1,200 enquiries from potential franchisees reach the head office.

At the international level, the Spaniards work exclusively with master-franchisees. "That is a simple and efficient system – once the partner has been given a thorough check-up." Only through local partners, Robledo says, is it possible to gain maximum local knowledge. Products, prices and design are adapted to reflect national preferences, following critical work by the group-internal research and development department. "For our guests in China and Russia, for example, we have adopted six soups into our range, which have been very successful. Our motto is: as much Spanish identity as possible, as much local modification as necessary." It is quite a challenge, he continues, to bring Spanish cuisine to the public beyond the borders of Spain. They do so mostly by means of well-illustrated menus and numerous marketing campaigns and events, such as Flamenco performances. "In the USA our main task is to project our image as a European concept in distinction from Mexican and Latin American formulas."

Apropos Europe, and the group's homeland, Spain: here, in mid June, the Comess Group de Restauración has launched its APTC food-court formula in the new Ter-



"Within the next five years, we aim to reach sales of €300 m," says Manuel Robledo, President of the Comess Group de Restauración. While Lizarrán and Cantina Mariachi will be rolled out internationally, development of the Rock & Ribs and Pasta City brands is currently limited to Spain.



Pasta City

#### ● Cantina Mariachi

'Fresh Mex casual & cantina bar', opened in 1994. Currently 152 outlets: 121 in Spain, 18 in Italy (since 2003), 8 in Portugal (since 1999), 3 in Turkey (since 2008), 1 each in Russia and Dubai (since 2009). 150 sq m on average, decorated in bright Mexican colours, with seating for an average of 60. Core range: tacos, burritos, nachos and beer. Public between 16 and 40 years. Average bill €13.50, sales per outlet round about €500,000. Growth plans: 5-6 outlets per year in Spain, further outlets at international level in the near future: Russia (4), the Middle East (6) and Turkey (2). [www.cantinamariachi.es](http://www.cantinamariachi.es)

#### ● Pasta City

Italian casual family restaurant concept, launched in 2001. Currently 34 outlets. Average size about 200 sq m, 60 places on average. Core products: salads, pizza and wine. Average bill €12-15, average sales per unit €500,000. Growth plans: 10 openings per year in Spain. [www.pastacity.es](http://www.pastacity.es)

#### ● Rock & Ribs

'American BBQ & Grill', launched in 2004. Currently 18 outlets. Average size 300 sq m, seating for 90. Country American design, core products: ribs, burgers, salads and American food. Main target group: families. Average bill €12-15, average sales per outlet about €750,000. Growth plans: 5 openings per year in Spain. [www.rockribs.es](http://www.rockribs.es)

#### ● Lizarrán

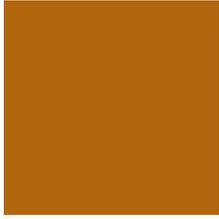
Tapas formula with a Northern Spanish emphasis. Opened in 1988, taken over by Comess in 2007. Currently 195 units, of which 10 in Portugal (since 2000), 9 in France (2005), 1 in Andorra (1999) and 1 each in the USA (2008) and China (2008). Average size 200 sq m, seating capacity 60. All age groups. Core products: Spanish pinchos (€1.20), tapas (€4), beer and wine. Average bill €9, sales per outlet €700,000. Growth plans: 30 openings in the USA, 20 in China, 5 in Russia, 25-30 in Spain, 10 each in Italy and France. [www.lizarran.es](http://www.lizarran.es)

minal 1 of Barcelona Airport. It unites an express version of Cantina Mariachi, the Mediterranean concept of Sun Food, the China Boom brand (urban Chinese cuisine) and Organ & Co., which promotes organic food. All fast-casual formulas, and all – whether successful individually or collectively – designed for national and international multiplication. "Through international roll-out, new openings at home and takeovers of leading catering brands, in five years we intend to reach sales of €300 m," says Robledo. That he has the courage of his visions and the energy to make them reality is something which this ambitious late entrant to a new industry has shown more than once.

Mario Cañizal Villarino

**Chronicles of the  
Annual European  
Food Service  
Summit 2000-2010**

**5**



En el resumen ejecutivo, ya se anticipaba que el tridente formado por Gretel Weiss (FSE&ME) David Bosshart (GDI) y Chris Muller (Universidad Central de Florida) serían las tres patas de un banco llamado Summit o reunión internacional, anual desde 2000 hasta nuestros días, convocada para presentar a los directivos de la restauración de marca y sus proveedores, también marquistas, pronósticos y prospectivas del mercado de foodservice, que les permitieran hacer de su sector una inexpugnable fortaleza, ante crisis económicas y no económicas, como la pandemia, el atentado de las torres gemelas en NY o simplemente manipulables corrientes informativas que aún no usaban las RRSS, tales como la que protagonizó, en su momento, Morgan Spurlock con su episodio, *Super Size Me* en 2004.

La estructura de las sesiones (que incorporó en años venideros un *study tour* en torno a conceptos de restauración operando en la ciudad de Zurich) supo combinar sesiones en busca de predecir lo que es más que probable ocurriera en el sector, con el apoyo de expertos -entre otros- del GDI, Technomic o NPD-CREST (hoy Circana) con las relativas a explorar futuros escenarios (en materia de incertidumbre, tendencias o cambios disruptivos) cuyos rasgos permitieran preparar la toma de decisiones de mañana, hoy; contando en las reuniones con gurús como Nordstrom o Lindstrom, poco conocidos en España, pero muy reconocidos en el resto de Europa. Especial atención se pondrá en el análisis de los cambios de conducta del cliente de la restauración moderna.

En medio de esa dicotomía, figurarían tratamientos doctrinales tendentes a asentar los principios y métodos en el foodservice, que se resumirían en términos (jargon) bien conocidos actualmente en la profesión, tales como *public living room*, *value for*

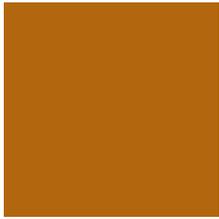
*time*, *cross border*, *share stomach* pero también *leisure*, *fast casual*, *insights*, *mindsets* etc etc.

Todo ello partiendo de las experiencias relatadas por los que podrían considerarse iconos de la Summit, tales como, sin seguir un orden cronológico, ni en cuanto a su notoriedad, Rolf Hiltl (Hiltl), Tony Hughes (M&B), Andreas Karlsson y Alan Yau (Wagamama), Walter Seib (HMS Host), John Vincent (Leon UK), Julian Metcalf (Pret), Robert Brozin (Nando's), Louis Le Duff (Brioche Dorée), Henry McGovern (Amrest) o los pintorescos James Holder (La Tasca) y Rostislav Ordovsky-Tanaevsky Blanco (Rosinter), sin olvidar a Herwig Nigermann, otro admirador de España.

Celebrities a los que nada tendrán que envidiar otros invitados a participar como ponentes y en este caso, de procedencia española. Grupo donde constarían entre otros, desde Marc Juliá (Paradis) ya en la primera edición, hasta Gustavo Durán (Telepizza), Ignasi Ferrer (Eat Out), Guillermo Moreno y Enrique Francia (Vips), Steve Winegar (Zena), Ricardo Rodríguez (Jamaica Coffee Shop) y hasta un profesor del Iese como Jose L. Nueno ensalzando el Fast Good de Ferrán Adriá.

En suma, un evento con dos apretadas jornadas cada año, unidas por la *soirée* del Boat Party, lugar ideal para ver y ser visto, a la hora de networking y el más puro business, más allá de los pasillos del GDI y del Lake Side Casino, sede de las reuniones.

Les invitamos a revisar las crónicas de las Summit, tras recomendar leer, en este capítulo, un editorial de W y W sobre la primera edición, la mayor parte de ellas redactadas por Bruce Whitehall, periodista británico que ha contribuido muy mucho a lo que se conoce sobre el foodservice en Europa y buen conocedor del sector en España, en la etapa considerada por este trabajo.



### Slogans con las que se conocerá cada edición del Summit\*

Fecha de Aparición	Edición	Slogan o lema que titulará el evento anual
2000	1	“What Comes After What Comes Next?”
2001	2	“New Predictions,New Perspectives,New Paths for Succes”
2002	3	“Playing the Attraction Game”
2003	4	“Strategic Ingredients for Future Succes”
2004	5	“The News Battle for Mouths, Minds and Markets”
2005	6	“Innovation and Re-invention from the Core”
2006	7	“Future Strategies for Building Culture”
2007	8	“Change the Conversation with the Customer”
2008	9	“Business in the Time of Social Networking”
2009	10	“Setting a Course a New Horizon”
2010	11	“Game Changing and Game Changers”

Fuente: DFV Mediengruppe

**\*Estos artículos pueden solicitarse a: [www.dfv-archiv.de](http://www.dfv-archiv.de)**

Aparecen a continuación, como homenaje al triunvirato organizador, la crónica de la primera edición de la Summit en el 2000 (más el editorial de WyW sobre el evento) y la de la Summit en el 2004 y el artículo aparecido, con motivo de su 20º aniversario, que apareció en la revista en el número “autum 2019”.

- “What Comes After What Comes Next?” (1ª ed. en el 2000)
- Editorial de WyW sobre la 1ª edición: “Summit Essentials”
- “The News Battle for Mouths, Minds and Markets” (5ª edición en 2004)
- Sobre las 20 ediciones de la Summit by M. Wachholz

## Summit Reaches New Heights

### EVENT

Panel discussion, moderated by Peter Martin, Martin Information, UK: Senior restaurant chain executives from all over Europe on strategies and challenges of international development.



# Summit Reaches New Heights

**1<sup>st</sup> European Foodservice Summit**

Think Tank and Congress for the Restaurant Industry

Given a forward-looking theme – “what comes after what comes next?” – and plentiful opportunities to interact and network, delegates, speakers and sponsors at the 1st European Foodservice Summit conference in Zurich in October collectively generated a remarkable creative energy. Repercussions of the meeting will surely impact on many strategic decisions made by international foodservice companies over the next decade. Bruce Whitehall reports.

The right location: a neutral country between West and East Europe, famed for its gastronomic excellence and a pioneer in postwar foodservice system development. The right timing: the first year of a new century and a period of unprecedented expansion and innovation in European foodservice.

The right audience: over 200 senior foodservice industry executives from 18 countries.

These and other factors gave great promise to the 1st European Foodservice Summit held in Zurich, Switzerland, on October 10-11. But what made this event a true milestone in the history of the global hospitality industry was its content. The two-day pro-

gramme was packed with market data and forecasting insights but three key trends constantly recurred:

- the **changing value perceptions** of today's consumer, particularly in respect of 'value for time'
- the **importance** to foodservice brand success of 'telling a story' and making an emotional connection with consumers rather than simply supplying them with products
- the growing range of opportunities and incentives for **taking European foodservice concepts across borders.**

Senior restaurant chain executives from France, Germany, Greece, Italy, Spain and the UK all provided insights into the poten-

tial of developing their businesses internationally but it was an American, Prof. Chris Muller of the University of Central Florida, who pinpointed new-found European confidence in a market where US chains have so far taken the lead.

"It's your turn to take back your markets," Muller told the delegates. "You do not need to act like an occupied region." A notable example was the revitalisation of cafe culture, which he personified as a symbol of today's social change, driven by the desire for community, connected-ness and ironic sophistication in a mass market society.

"Europe invented all the market forms: bistro, trattoria, taverna, pub, biergarten, kaffeehaus," Muller said. "We have appropriated them in the USA but we do not get them right. We're good at singles bars and the quickservice business. We are apparently good at the coffee shop but it was a market form which Starbucks copied from Europe and Americanised."

"Europe owns these categories and you should not only be dominating the business but you should be exporting them to the rest of the world." He concluded that the global market was a wide-open door – "every market segment is up for grabs."

# Summit Reaches New Heights

Gustavino's has 2 independently-operated kitchens, the one in the main restaurant extending the entire length of the end wall of the restaurant. There's a seafood bar which, in addition to shellfish and crustaceans, also serves a selection of fish dishes which change on a daily basis, subject to market availability. A 37-year-old chef supervises a team of 6

## Too often designers over-design interiors and chefs over-design food.

sous-chefs and a kitchen staff of almost 100. In the period following its opening, the restaurant served between 500 and 700 evening meals. They aim to serve 800 to 1,000 guests a day with an average bill of between \$35 and \$45. The sales target quoted is \$15 -18 million.

It took 5 years for Conran and his long-term partner, Joel Kissin, who has a financial stake in the business and also manages the new operation, to plan and prepare the project. "It was the most complicated thing I've ever done," says Conran. The 68-year-old London restaurant king has apparently invested over \$20 million in the Bridgemarket project, the name of the entire complex which, although a listed site, was previously a totally run-down farmer's market. Countless investors and not least the city itself are hoping and counting on the fact that the project will result in the area's resurgence.

With Gustavino's, the knighted impresario Conran, has now launched his 21st brasserie and bar concept – 18 of them in London.



## Design Thoughts

Everything that has ever been made by man or woman is designed. This is such a fundamental truth that we often overlook it or take it for granted. But it is worth dwelling on briefly as a means to understanding what we mean by design. Everything has been designed, from the humble paper clip to the latest Formula One racing car, from the corkscrew to the Swiss army knife. It is easy to forget that the milking stool, for instance, is every bit as designed as the Jacobson 'Egg' chair.

Key to successful designing is a knowledge of raw materials; how they work, what affects them and how long they last are just some of the considerations that need to be taken into account. Materials that improve with age are a must – they should take on a patina of charm the more they are used. Zinc is an excellent example; the more the metal surface is wiped, leant on and marked, the better it looks. Too many designers choose materials and finishes that look great on day one, but then deteriorate through everyday use.

Many designers have an arrogant belief that they can, and should, introduce change for change's sake. When designing something, we shouldn't forget the past.

Something similar will invariably have been done before (there's a definite distinction between designing and inventing) so we need to examine what has already been done, find out what worked and why, and see if we can improve upon it. Designers should learn from the past – innovation, not imitation. Think of the dripping teapot spout: there must be hundreds of thousands of designs for the teapot, but few have actually managed to eradicate the problem of the 'post-pouring' drip.

No place needs intelligent design more than a café, restaurant or bar. They are places that have to work efficiently for the staff, and be ergonomically considerate, not just for the staff but for the customers as well. They also have to have a pleasant, charming and comfortable atmosphere – quite a complex balancing act for the designer to combine what I always think of as factory (kitchen) and retail (front of house).

One of the most important things when designing a restaurant or bar is to make people feel comfortable and at ease, not challenged. Too often designers over-design interiors and chefs over-design food, believing they are artists rather than craftsman and assuming that their inadequacies will be covered by clever gimmicks. Hence the criticism of 'designer' this and that. Design is, of course, important, but less so than the food and service; they all mesh together and the way a place looks will often determine the way it works.

Just consider how a waiter gets from the pass to the waiter station and then to the customer – this is all carefully designed. But if the food or service is bad, the design of the place isn't going to be thought of at all – '... the soup was cold, the service was dreadful, but did you see the superb curves of the table legs ...?'

People won't necessarily notice good design straight away but they'll certainly be aware of bad design – think of the chair that gives you back ache or the pen with erratic ink flow. These things are frustrating and needn't happen. Intelligent design adds value; it is crucial to the quality of life and should be carefully considered, whatever the brief.

by Sir Terence Conran, Terence Conran Limited, London/UK



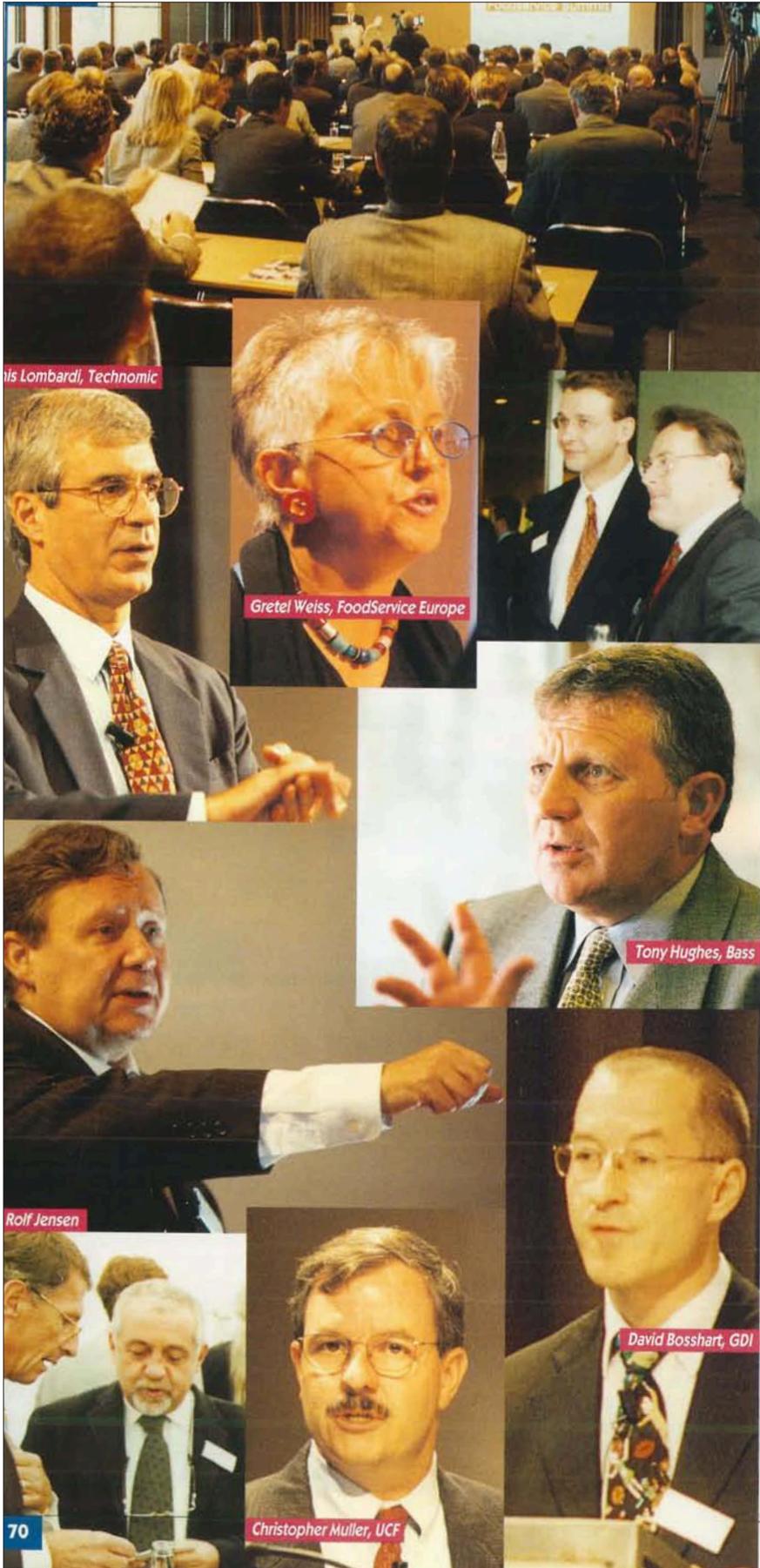
Sir Terence Conran

## Made by Conran

- London: Bibendum ■ The Gastro-dome ■ Quaglino's ■ Mezzo ■ Bluebird Foodmarket and Restaurant ■ Zinc Bar and Grill ■ Orrery ■ Sartoria ■ Coq D'Argent
- Europe: Alcazar (Paris) ■ Berns (Stockholm)

## People won't necessarily notice good design straight away but they'll certainly be aware of bad design.

# Summit Reaches New Heights



## From guest to kitchen

Gretel Weiss, Editor-in-Chief of FoodService Europe, highlighted key demographic issues favouring European growth in the world foodservice market, including a population 2.2 times that of North America. However, a fundamental realignment in the way that restaurants think about customers is needed. "Yesterday, most of us were thinking from the kitchen to the guest – from cooking to serving to selling. Today and tomorrow, we have to do it the opposite way."

That's why many successful change-makers in foodservice no longer come from within the hospitality industry. Weiss likened coffee bars, pizza-delivery and soup shops to dot.com start-ups: "The people who have originated them have no knowledge of restaurant kitchens and that makes it easier for them to think from guest to kitchen."

## Lifestyle issues

Plenty of factors support the emergence of new lifestyle-related concepts: increasing net income, smaller household size (therefore less cooking and less expenditure on kitchens) and – crucially – the increase of women in the workforce (now 35-40% in most industrialised countries and likely to go as high as 70%). But consumers look to foodservice to provide more than just sustenance. As with other lifestyle-related purchases, they "buy into a dream", according to Rolf Jensen of the Copenhagen Institute of Future Studies.

"The next generation of consumers will buy brands not for their practicality but for the look, lifestyle and emotion they provide", Jensen said. Brands "tell a story". Disney does not just sell movies and theme park tickets, it sells family happiness. Guinness sells friendship as well as just glasses of beer. The story needs to cross borders; Nike shoes can be produced in China or Estonia and still tell the same story.

Just like human emotions, stories don't have to be true or accurate, but they need to be in tune with consumer needs and skilfully packaged. Adventure is often a key component – "it comes in five sizes: small, medium, large, XL and XXL."

Once you own the story – like 3000-5000 significant brands around the world – you can attach any product or service to it. For example, the Marlboro Man's Wild West lifestyle has been extended from cigarettes into markets as travel and cook books.



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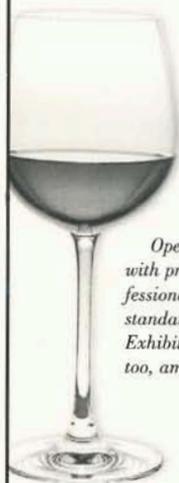
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However, as consumers demand more individuality, could the big brands become endangered species? "We don't know yet," said Dr. David Bosshart of the Gottlieb Duttweiler Institute, whose Zurich headquarters hosted the conference. "But as the economy grows, we are seeing much more hyper-specialisation." Management systems and technology will continue to be very relevant, Bosshart said.

"But the richer we get, the more we need differentiation, driven and developed by cultural values, aesthetics, sensuality and emotion." Several speakers from food-service chains illustrated how they were responding to the need to tell a story. Annette Mützel, Sales and Marketing Chief at Germany's second largest foodservice chain Nordsee, identified 'emotion' as a key issue in recent brand updating. This has majored on freshness and lightness to tap into changing lifestyle concerns, notably health, time pressures and the need for convenience.

Mützel described a problem common to all long-established brands. "We have to keep a very sensitive balance, gaining young customers without losing our loyal base of older customers," she said. This has needed patience and confidence as well as greater encouragement of store managers to become entrepreneurs and re-investment in the hardware of the business.

André Lacroix, President of Burger King Europe, Middle East and

Africa, admitted that the BK brand, while not old in years, was by the mid-90s "behaving like an old brand, almost ready for retirement." A key decision was taken: re-energise the business by releasing untapped energy within existing employees, franchisees and suppliers, rather than the ruthless hiring and firing which management books often advocated. Thus a three part brand revival plan started with

### Who will lead?

- The Better Story Tellers
- The Visionary Change Agents
- The Allies of 'Generation D'
- The Legendary Brand Partners
- The Radical Pioneers

Source: Christopher C. Muller, PhD, UCF

*A Highlight: Ueli Prager, the now 84-year-old founder of Mövenpick, was honoured with the Lifetime Achievement Award. The eulogy was held by Michael Pieper, CEO of Franke, Switzerland (left) - on UP's right: G. Weiss and M. Wachholz (FoodService Europe).*



an "internal brand relaunch" which included such themes as "make every bite right". This helped generate the confidence and motivation within the business sufficiently to convince consumers about the brand's appeal and led to the re-energising of most elements of the concept, from product delivery and speed to friendliness and cleanliness. The programme seems to have worked: BK 1999 sales increases included a 28% uplift in Germany and 25% in Spain.

A key element of BK's revival was in re-thinking its story, as with its 'Americana' theme, with red seating, warm colours and high energy lighting. But QSR also needed constant new product innovation, as with BK's King Fries - with a proprietary BK coating technology for extra flavour - and the Big King XXL

### Global Trends

1. Desire for 'Fast Casual'
2. Targeting the Single Adult Female
3. Frantic Focusing on Talent Retention
4. The Reawakening of 'Environmental Design & Psychology'
5. Concession by the Baby Boomers of the Internet to 'Generation D'

Source: Christopher C. Muller, PhD, UCF

# Summit Reaches New Heights

■■■ **Development of Society** ■■■■■■■■■■

Society	Hunter & Gatherer	Agri-culture	Industrial	Information	Dream Society
Unit	The Tribe	Family	Hierarchy	Networks	The Tribe
Playing Field	The Cave/ Tent	Farm	Factory	Office	Themed Environment
The Admired Person	The Oldest	Head of Family	Capitalist	Expert	Storyteller
Value	Spirits	God	Products	Knowledge	Experience

Source: The Copenhagen Institute for Futures Studies



with its 228 grams of grilled meat. Aspects of the biggest European foodservice story of all were told by Jürgen Knauss of Heye & Partner, who has handled advertising for Mc-

**Time waits for no one. Yesterday is history, tomorrow is a mystery. Today is a gift – that's why it's called 'the present'.**  
Tony Hughes

Donald's Germany since its 1971 entry into Europe to today's 1,020 unit, €2.2 bn chain. In the beginning, the focus of advertising was on changing attitudes, like encouraging consumers to eat with their fingers. Promotion has since become very diverse, but always with the

emphasis on being 'new, contemporary and innovative'.

As well as screening some of the TV commercials which helped build the chain in Germany, Knauss gave some interesting sidelights on working for the world no.1. McDonald's spends a lot of money on market and customer research but nothing on advertising research; instead, they rely on the agency's creative instincts. Heye's latest campaign is running in 13 countries.

All members of the agency's account team (now 60 strong) must work one week in a branch of McDonald's; 'every time you walk into McDonald's, you walk into the brand,' Knauss said.

McDonald's use of the Internet was highlighted by Dennis Lombardi, Executive Vice-President, Technomic Inc of Chicago. There is now, he said, a website in every single state in the US, all with the 'Mc' prefix, designed to provide consumers and others – especially potential job applicants – with information. But the chain was also vulnerable to pressure group sites like McSpotlight.org. Lombardi forecast that the Internet will become the single most important public relations job of the marketing departments. 'Consumers can talk to each other in a way they never could before,' he pointed out. 'If you want a really scary experience, spend some time on the Internet and find out what you can find about your own company and just see how much information is out there, readily accessible, to your competitors as well as anybody else who wants to use it. There are not many secrets in our business any more.'

Technology, both in kitchens and computers, will be increasingly important in responding to consumer time pressures. Dennis Lombardi identified 'time poverty' as perhaps

+++ size does matter +++



+++ The new GS 515 +++

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# Summit Reaches New Heights



the most important driver for most foodservice concepts, whether takeout, HMR, QSR or casual dining. "We are becoming a society which has forgotten how to rest, a 24/7 culture which is spinning out of control." The foodservice industry was no longer just concerned with share of stomach – "we are fighting for share of clock".

This time pressure applies across the foodservice spectrum. Today's consumer wants to be in control of the pace of their meal.

Given this demand, Lombardi characterised 'fast casual' as an emergent megatrend. Such outlets offered an elegant environment, consistent with occasion and lifestyle-related dining, but counterservice more typical of fast-food, which contributed significantly to labour cost reduction and low average check (\$6-9). The concept worked well on ethnic lines as with Pei Wei (Chinese) and Soprafina, which had a Tuscan menu; ("it's hard in the USA to open up a plain Italian restaurant anymore," Lombardi observed).

Tony Hughes, Managing Director, Bass Leisure Retail, Restaurants Division, felt that the consumer's time pressures needed analysis at each stage of the transaction. Techniques used by Bass include 'velocity per minute' (ratio of customer's bill to length of the meal experience) and 'revpash' or revenue per available seat hour. Meanwhile, performance analysis has moved from yearly to weekly to daily frequency. "The next trick is to move to hourly analysis," Hughes said.

Hughes described key factors in developing Bass's portfolio of six restaurant brands. The company applied a framework of common principles for defining and positioning brands but employed focussed management teams within each brand. This was important in ensuring that brands developed their own culture while still benefiting from the investment backing of a large group. The main issues of Tony Hughes' speech will be published in the next issue.

## ■ ■ ■ The 2nd Summit ■ ■ ■

The success of this year's conference was sufficient to ensure the event becomes a regular annual fixture in the European calendar. Next year's conference will take place, again in Zurich, in Autumn 2001, with backing once again from Gottlieb Duttweiler Institute, 'FoodService Europe' and the University of Central Florida.  
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VIEWPOINT

# Summit Essentials



The editors  
**Gretel Weiss (GW)**  
**Marianne Wachholz (MW)**

In mid-October, over 200 key players got together in Zurich for the first think tank and congress for the European foodservice industry. As co-organisers, we may say: it was an outstanding event, a great moment in the history of the development of hospitality-management communication: a new platform is born. We have chosen 7 statements made during the summit, which clearly illustrate the process of change currently taking place in the foodservice sector. The fact that practically each of these statements holds true for everywhere from Dublin to Istanbul underscores the vision of the summit. Let's have a look:

■ Deciding whether somebody is a pioneer defines the market place. Not one's own pretension. There is an obsession which drives the pioneer to do, what he does. Monomania: there is one thing which is important and only one thing and that is what one is able to achieve. He listens to his inner voice and follows it with firmness. A real pioneer pre-sents changes and he converts these changes into new activities before some-body else does.

■ The evolution of value for money to value for time is most important. Increasingly, the concept of value for money is yesterday's thinking – price is now becoming a necessary filter for something more important to customers, the value of time. We live our lives faster than ever before. Instant mail, fast-food – we are becoming the microsecond microwave society. In restaurants this means more colour and plate impact, more taste, more variety and certainly more experience for the time spent. The worst crime is to waste someone's time by failing to deliver. Time management will become the major issue.

■ Technology: the single largest change agent of these decades. By the way the internet is the fastest growing technology in history. It only needed 4 years to reach 50 million users (radio 38, PC 16, TV 13 years). Internet influence will become the largest PR-challenge facing all restaurant chains. Internet = knowledge. Knowledge = power. Power = demand for performance.

■ Over recent years in any sector, cheap has changed its image. From cheap and nasty to cheap and cheerful and now maturing as cheap is clever. World class operations taught us however there is a great skill to using every day low price as a lever for profit and not bankruptcy. Adopted for our industry, this can mean: vol-

ume (via effective capacity management and yield management) and value (via every day low price) = profit. Or put it simply: let's focus on heads in beds and bums on seats.

■ The power of a brand is in the culture, vision and energy that an organisation working to clearly defined goals, values and beliefs can generate. All responsables have to think, dress, and act in a way appropriate for their brand culture. Managers and staff work for their brand team first and company second. Constant brand evolution is essential for success in the restaurant industry...

■ The 6 new market profiles in a society that is shifting from information to imagination: the market for adventure, the market for love and belonging, the care market, the who-am-I market, the market for peace of mind, the market for convictions. The brand's story is the company's biggest asset and gene code. The best story wins! A good story appeals to your heart, it can be told again and again – and feature different themes.

■ Europe is not one market, but 15 – 20 different markets. Small companies are still dominating the picture and even most chains are still national, not European: but our daily bread is becoming globalised and homogenised. All major trends travel across boundaries today. The pace of change in our industry is breathtaking. Changes in demographics and technology are having a profound impact on consumer demand.

2000 was an important, exciting and highly successful year for FoodService Europe. We doubled the number of issues from 2 to 4 per annum and, from all your faxes and e-mails, we know we are on the right track: our magazine is of great importance for the way in which the foodservice sector grows together. In 2001, FoodService Europe will appear 5 times. In addition to the quarterly issues, there will be a trend book with an overview of different foodservice disciplines in the late summer.

Looking at the third year of FoodService Europe, we must say: it has been lots of fun communicating useful and readable information for a rapidly growing reader target group. And we would like to thank everybody involved - from our collaborators to our customers - for their support. In particular, we want to thank our readers for their positive reactions. It's good to know that we will be tackling the future together. All the best for 2001!

Now in its 5th year, the annual Foodservice Summit in Zurich has gained a solid reputation as an industry think-tank and multi-national networking opportunity. Focus of this year's Summit, which attracted nearly 250 senior executives from 24 countries, was 'The New Battle for Mouths, Minds and Markets' and it provided a densely packed programme of data, case studies and insights into changing markets, brand development, customer behaviour and executive aspirations. Report by Bruce Whitehall.



Martin Lindstrom

## Mouths, Minds and Markets



Andreas Hacker

North-south transfer of culinary themes gained a lot of attention over the two day event, with senior executives from four fast-growing chains showcasing brand development: Spain's 485-unit Eat Out group, increasingly known internationally for its Pans & Company baguette chain and Loja Das Sopas fresh soup restaurants; Flocafe, the dominant player in coffee bars in Greece; Germany's fast-growing Cafe Del Sol café-bar-bistro chain; and the UK's 45-branch La Tasca tapas bar chain. This dazzling mix of successful formats was hailed by conference chairman **Christopher Muller**, associate professor in the hospitality management department at the University of Central Florida, as "an incredible statement of how the market has changed in the past five years – truly original concepts created by European mindsets for European market segments."

### Human relationships

Muller felt that foodservice was ultimately about trust. "Restaurants are built on one

person coming in for one meal on one day. That person looks for authenticity, connectedness, sense of locality, honesty and a human relationship." Relationships proved an important discussion point at the Summit. An extensive menu of coffee, snacks, cakes and ice-cream helped Flocafe become Greece's market-leading coffee bar business with 64 branches and €42 m sales in 2003, putting them well-ahead of Starbucks and Häagen-Dazs Café. But cultural values had also been essential, said the chain's general manager **Vasilis Halkias**. "We see food and drink as the basis of good human relationships and quality of life," he said.

Flocafe depicted its outlets as "time-shelters" – somewhere to go for socialising, relaxation and entertainment. As well as being a trendsetter in Greece, the chain expanded last year to Cyprus, where it now has two units.

### Emotional underpinning

The 6-unit Cafe Del Sol cafe-pub-bistro chain, located in the cooler latitudes of Germany, likewise put a lot of emphasis on connecting with customers. "We are a very emotional company; in certain ways, we're like a family", observed **Christian Eggers**, co-owner of Gastro & Soul, the creator of the three-year-old chain. "We are highly or-

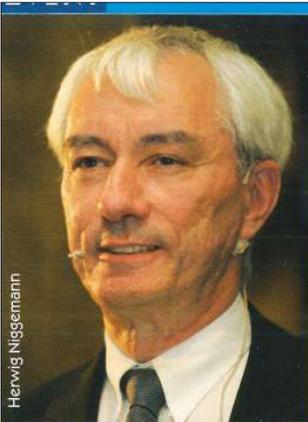
ganised and systematised but, for the guest, it is a relaxed and uncomplicated experience."

The ethos was a "sunny island in a rainy, cold and hectic daily routine". Putting this theme into large, edge-of-town freestanding locations with distinctive building features, warm decor and colourful mix of Mediterranean and American food proved unexpectedly popular. It quickly proved a popular all-day destination for its regular clientele, around 60% of which were women. Sales bias was 66% beverages – over a third of them coffee and hot drinks – to 34% food.

All units were, Eggers indicated, virtually identical at around 360 sq m. Parking for up to 400 cars was a reason to visit for 20% of guests, many of whom drive for more than 30 minutes to get there. Eggers foresaw 100 units and believed that the concept could be taken into other countries.

Sunny holidays were also the inspiration for the UK's 45-unit La Tasca chain, a mainstream casual dining chain with a strong Spanish flavour in its tapas and paella menu, wines and beers and decor. Chief executive **James Horler** said that the chain had proved particularly attractive to women, typically single, who make up 70% of the clientele. One tongue-in-cheek recommendation for a fun-filled evening at La Tasca is that it is "so authentic you won't find anything like it in Spain." Horler summed up the essence of La Tasca's rapid growth as "think big but act small". La Tasca was the only hot concept to have units in the USA: just two so far, close to Washington, DC.

*Visionary insights for entrepreneurs and senior managers from the international restaurant industry: Again, this year's European Foodservice Summit presented ingenious speakers and top quality input in terms of future trends and strategic topics.*



Herwig Niggemann

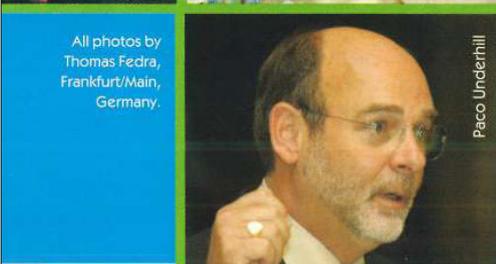
The conference's starry panel of CEOs shedded light on the dynamics of their numerous brands as well as probing personal goals and inspirations.



Michael Flaxman



Christian Eggers



Paco Underhill

All photos by Thomas Fedra, Frankfurt/Main, Germany.

## Fast-casual opportunity

Speaking during the CEO panel discussion, **Ignasi Ferrer**, the 35-year-old boss of Spain's Eat Out group recounted his company's rapid and successful development of 485 outlets in Spain, Portugal and Italy. Growth came from filling a "fast casual" gap between fast food and traditional restaurants and applying the format in a multi-brand, multi-channel way, from bocadillos and sandwiches to soup and coffee bar formats.

In developing new concepts, new countries and new channels, major challenges have included increased research and development investment and a commitment to becoming a benchmark employer. Acknowledging that restaurants are not always rated highly as employers, Ferrer highlighted two social initiatives: a group of Eat Out employees helped build a hospital in Mauritania last year and this summer company volunteers similarly went to an equatorial forest region to assist in tourism initiatives. Underpinning all company activities, it was also essential, Ferrer said, to have fun. "Without that, you cannot keep moving forward."

## Riskless eating adventures

**Gretel Weiss**, publisher and editor-in-chief of 'FoodService Europe & Middle East' echoed the opportunities for new concepts when she highlighted several key pan-European trends:

- recipes, meals and menus are becoming more feminine. Women's values – favouring fresh, feel-good food with a new balance of animal and vegetable items and a more sophisticated look – are becoming very influential.

- Italian food and beverages provide a major culinary frame at every level – not just because of ingredients but also lifestyle components like design, fashion, music and holidays.

"The emotional message of Italian food is just perfect for restaurants," Weiss commented.

- bread-based meals: hot and cold handheld snacks and grab-and-go foods, drawing upon the continent's rich bread culture as well as increasingly sophisticated

recipes and baking technology, offer a "virtually unlimited innovation pool". However, Weiss advised a measure of caution on menu development, concluding that most restaurant customers sought the contradictory ideal of a "riskless eating adventure." "People go for innovative offerings but only to a certain degree," she pointed out. "To feel comfortable, we also need the food of our childhood on the plates."

## Brand polarisation

"We are experiencing a tectonic shift in marketing" said **José Luis Nueno**, professor of marketing at the IESE business college in Barcelona and one of Europe's leading marketing and management experts. He was referring in part to a polarisation process which threatens middle-ranked brands. Nueno believed that only superstars were well placed to survive this winner-take-all scenario, with only one, or most two, winners per category.

Drawing an analogy with Real Madrid "best brand in the world" for its combination of history, romance, identification to city, and emotional values – Nueno hailed the market leverage potential of restaurant super-brands. The brand equity built by star chef Ferran Adria, whose El Bulli restaurant in Rosas has gained worldwide acclaim for its unusual cuisine, could not successfully migrated downwards.

Adria's Fast Good fast-casual restaurant concept for the NH Hoteles hospital group was achieving daily sales of gourmet hamburgers, salads and drinks around €5,000, compared with €4,000 McDonald's units in Spain. NH had received 169 requests concerning Fast Good franchising.

## Looking East

**Michael Flaxman**, managing director of Accor hotels for northern, central and eastern Europe, touched on aspects of customer service in the context of the training challenge facing branded chains as they entered new markets. "Teaching behavioural skills takes up an enormous amount of time," he said, with particular reference to Eastern Europe. Customer service fundamentals such as smiling at the customer took time to become part of the culture. Accor has 4,000 hotels around the world operating a pyramid of brands, with about half of them in Europe. The Eastern European market is considered an increasingly important candidate for growth. In Poland

# Mouths, Minds & Markets



the company has 69 hotels open and 50 in Russia, with more being developed at breathtaking "roller-coaster" speed. Romania is also proving an exceptionally dynamic country.

The factors fuelling future growth for Accor has, Flaxman said, equated to those which propelled the foodservice industry, notably more leisure spending and rising aspirations. The big question mark is the extent to which a middle-class was currently emerging in the region.

Gretel Weiss also spotlighted Poland's key position in the enlarged EEC. For Western companies and multinational brands, Poland has outflanked Hungary and the Czech Republic as main gateway to the former communist world, with Warsaw representing a key town for restaurant development.

## Fast food penetration

"Think big – start small – scale fast" described McDonald's strategy when it decided to get established in Eastern Europe.

**Andreas Hacker**, senior vice-president Central Europe/Central Asia said the process started from a 30 minute conversation with then-supremo Fred Turner, followed by a series of "smell the market" trips. Gaining a foothold across the emergent region quickly highlighted a fundamental need, he said: "people with the right passion". Another conclusion: "Western arrogance is completely out of place in Eastern Europe." The company was greatly helped in its eastern European expansion, Hacker felt, by its decentralised structure and "democratic dictatorship". Now with 800 McDonald's restaurants in 17 countries around Eastern Europe, Hacker concluded that there was an amazing amount of talent in the region to the extent that the chain exports Romanian managers to its Italian business.

He also concurred with Michael Flaxman's earlier assessment of the potential of Romania. "We had 40,000 customers on the first day at our first Bucharest store," Hacker said. McDonald's is now perceived as one of the few five-star restaurants in the country. After seven years of investing in the infrastructure (locations, human resources, marketing, supply chain ...), the Romanian operation finally reached double digit returns this year.

## Counter service interface

For the many foodservice operators which now provide meals via counterservice,

**Paco Underhill**, CEO of the Envirosell retail consultancy, provided detailed insights into the pitfalls of visual information. Underhill, a leading expert in consumer behaviour and author of several books on the "geography of shopping", observed that few foodservice chains give anyone specific management responsibility for correct development and use of restaurant signage. Envirosell has tracked 30,000 customers using 70,000 hours of videotape. Underhill showed examples of people failing to interact with menu boards, window displays, table cards, tray liners and other information aids and suggested that a great deal of money is wasted through either confusing customers or, worse, failing to get them to stay. His research suggests that 63% of all exposures to menu boards and other forms of menu display occur after customers have already decided what to order, in many cases because boards depict too many choices to be readily intelligible.

## Customer misinformation

**David Bosshart**, CEO of the Gottlieb Duttweiler Institute, Zurich, analysed the "new eating normalcy" and considered many of the contradictions of modern eating including the increase in eating disorders. Customer behaviour was constantly manipulated by meaningless menu buzzwords (like "tender" and "slow roasted") and by untruthful hype.

The authenticity which derived from tradition, local origins, or being "green" (eg organic or ecologically sourced) could help matters, Bosshart said. Fundamentally, there needed to be trust in the chef, in the brand or in the quality of ingredients – preferably all three. Bosshart warned that it was no longer possible to hide any aspect of the value chain from the media. Yet there was little concerted approach between foodservice, food manufacturing and food retailing industries to deal with issues which generate adverse attention. "With the growth of globalisation and global sourcing we need to stick together and turn the value chain into a trust chain."

## Guest manipulation

**Herwig Niggemann**, owner and managing director of fresh food distributor Niggemann GmbH, took up the theme of "manipulated guests", referring to the impact of potentially misleading information – like that surrounding the Atkins diet in the USA – on foodservice guests' increasingly un-

predictable behaviour. Examples of mind manipulation were Greenpeace's consumer activism and the anti-McDonald's movie 'Super Size Me'. Add marketing and advertising by foodservice companies themselves and it was not surprising, he concluded, that foodservice customers were confused and indecisive. "Marketing should make decisions easier and not offer more alternatives than a consumer can handle," Niggemann said. Key advice from Niggemann included:

- don't over-estimate new trends – most guests are still very conservative.
- react fast when crises occur.
- think local – not global; even McDonald's has numerous variants from country to country.

## Tween power

Children in the 8-12 age group were becoming a prime influence on choosing restaurants and other family purchases, according to **Martin Lindstrom**. The Danish brand consultant and author, who is based in Australia, led delegates through two energetic sessions: a branding workshop on the day before the Summit and an analysis

## ■ ■ ■ The Lessons this Year ■ ■ ■

1. Winner Performance in Foodservice: Make or buy the best restaurant managers. Develop or buy top level people for strategic jobs. From Gretel Weiss
2. Food Trends: Menus are becoming more feminine. Italian cuisine has developed to our culinary frame. Bread based meals continue to rise. From Gretel Weiss
3. To keep up with the 'Tween market' we should all go home and learn to play computer games. From Martin Lindstrom
4. Successful brands are based on fear, love or mastery. From Martin Lindstrom
5. There is a difference between a 'Culinary' Star and a 'Media' Star. From Jamie Oliver-Presentation
6. 'Stories with legs' create super brands. From José Luis Nueno
7. Customers long for authenticity which is created by: strong brands – strong chefs – strong ingredients. From David Bosshart
8. 'Manipulation' creates needs for new product rules and paradigm shifts. From Herwig Niggemann
9. Create new business models for new guest needs. From 'Hot Concepts on Stage'
10. Amenability & profitability are linked: Giving good restaurant is architecture + communication + operations. From Paco Underhill
11. Expect acceptance then give acceptance. From Debra Benton
12. Success comes from the best sites, best brands, best people. From the CEO Panel



SUMMIT\_REVIEW

# A pioneering European adventure

Back in 2000, the very first European Foodservice Summit “What comes after what comes next?” was launched to create a platform that would give Europe’s hospitality leaders insights, background knowledge and inspiration for their international strategies. (Re-)connecting and networking are also a central part of the international conference.



Summit founders David Bosshart, Gretel Weiss and Chris Muller

**A** good 20 years and various creative claims later, it is still all about thinking forward and out of the box, anticipating customers’ demands, identifying emerging trends and social as well as technological changes. How to adapt foodservice operations? How to prepare for upcoming challenges? It was the event’s intention to give profound answers to those questions from day one.

The Summit, preparing to take place for the 23rd time, has set content quality standards year after year. The focus was not only on case studies and cross-industry market research on the foodservice industry alone and players from long overseen regions were brought onto the stage.

We will never forget the first – and amazing – appearance of Russia’s Rostislav Orlovsky-Tanaevsky Blanco on stage in 2003, when the founder of the leading Russian foodservice group Rosinter made no effort to conceal that – and why – the company had been in difficulties more than once. Nor will we forget when, in 2011, Nadine Beshir from Egypt tal-

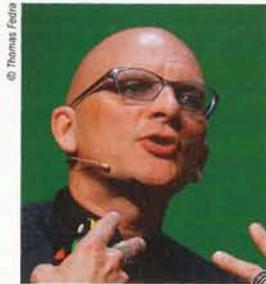
ked about her coffee bar project in 2011 during the Egyptian revolution. It was moving, an emotional highlight. Another exceptional highlight is *foodservice*’s own sales ranking of the top foodservice players in Europe that is presented every year by Gretel Weiss and is accompanied by the highly intellectual adventure trips of trend researcher Dr. David Bosshart.

#### A look from the inside out

The tried and tested dual strategy was to take a look at the industry from the inside and the outside and let the best minds in Europe and beyond have their say. Considering that the foodservice industry will inevitably always interact with the society around it and that the world is becoming increasingly networked, it is necessary to never lose sight of the big picture. And it was indeed an ambitious project at the time to take the Summit onto English-speaking territory in Frankfurt of all places, says Gretel Weiss. But the publisher and former long-standing chief editor of renowned German trade journal *foodservice* and its international sister

magazine *foodservice* Europe & Middle East, founded in 1998, was convinced that a print medium, whether analogue or digital, was not enough for the industry. “We didn’t only want to identify trends, showcase pioneers or make the market transparent for all interested international players with reliable data and analyses. We also wanted to support the professional exchange between companies and create a sense of family!” The German trade magazine wanted to take its success to the next, European level.

“Us” means the congenial cross-industry and supranational triumvirate of Gretel Weiss, Dr. David Bosshart, who had just become CEO of Swiss Gottlieb Duttweiler Institute and is a popular lecturer around the world, and Prof. Christopher Muller, the internationally recognised luminary of multi-unit management, who held a chair at Cornell University at the time. Other experts were soon brought on board, or better on to the advisory board. Their task was to identify relevant issues and hire qualified speakers. Quality manage-



Kjell Nordström



Nadine Beshir



Howard Schultz

## European Foodservice Summit 2022

Listen, learn, make friends: Covid-19 made that difficult of late. After two years of improvising - with the Digital Talk series in 2020 and a reduced face-to-face conference in 2021 - now nothing stands in the way of the autumn event kicking off at its usual location, the Casino Lake Side in Zurich. The conference will take place from 21 to 22 September under the motto "Time to Act: Getting Ahead of the Transformation!" Guests already present the evening before the event are very welcome to come to the get together at the Bar Razzia restaurant from 8pm. Get details and register at [www.efss.ch](http://www.efss.ch)



European business leaders discuss topical issues that are currently on the industry's agenda.

ment was the top priority! No entrepreneur with no time to lose will sit down for two days to listen to trivialities.

Response to the Summit's debut event at the GDI exceeded expectations. With deep intuition, the initiators put their finger on a latent need, and it became clear immediately that a new location was needed that offered enough room for up to 250 C-level participants. Because exclusivity and a family atmosphere were prerequisites. The opportunity had to be there for everybody to be able to meet someone they always wanted to have an informal chat with.

Ever since, the Summit has been staged at the Casino Lake Side on Lake Zurich. An amazing and at the same time relaxed location that furthers the concentration of a top-class programme. And the starting point for years for an evening boat trip with highly pleasant and creative catering from Marché International.

### Networking & friendships

It is a full house at the Summit every year, with more than 20 countries

from Europe – and for long now also the rest of the world – a regular presence at the event. Cross-border friendships add highly appreciated extra value for the Summit's guests. The question is what else makes the event so special for leading industry players and their teams to always return? Above all, it is the choice of speakers, who not only have the professional expertise but can inspire everybody.

A little fascination will not hurt as demonstrated by speakers like Samy Molcho, Reinhold Messner, Marije Vogelzang and Andy Holzer or industry heavyweights such as Starbucks founder Howard Schultz and New Nordic Cuisine mastermind Claus Meyer.

One of the many memorable moments was when Kjell Nordström took to the stage, one of the most popular economic experts in the world, teacher at Stockholm School of Economics, best-selling author and personality with a magic charisma. At his second Summit he had the audience enthralled. An epitome of a performer, he illuminated the secrets of

contemporary monopolies to a captivated audience. He made his listeners reflect on phrases like: "In the past, people lived their lives by chance. Today, we live our lives by choice." In moments like these, everyone in the audience has forgotten about their smartphone. Moments like these capture the Summit's atmosphere, fuelled by the emotional energy of Gretel Weiss and hosted masterfully on stage by Chris Muller. His closing words at the end of the Summit have become iconic. What we learned ...! One of his phrases says it all: "It's not about the money, it's about the mood!"

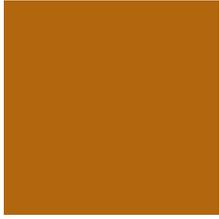
*Marianne Wachholz*

The room is always packed with attentive listeners from around the globe.



# Market Analysis

6



Sección reservada, casi en exclusiva, a los informes que tanto para la revista como las ediciones de la Summit presentarán los directivos de NPD-CREST (hoy Circana) en especial Jochen Pinsker, sin olvidar, aunque no se reproduzcan, los de otras entidades y empresas de consultoría, tales como la norteamericana Technomic o la suiza GDI.

En esta parte I recogemos tan sólo una crónica de NPD CREST, que se sumará a las que, más numerosas, se editarán en la parte II de este trabajo y la ponencia de Gretel Weiss en la Summit del 2001 que está llena de temas que ya se anunciaban hace 25 años y que son hoy pura realidad.

#### **Contenido: MARKET ANALYSIS**

Fecha de Aparición	Título
2001	Consumers: Moving Targets
2009	Big5.Consumer Facts

Fuente: DFV Mediengruppe

[www.foodservice.de](http://www.foodservice.de)

# Consumers: A Moving Target

## 1. Growth

– relationship of cause and effect –

- ✗ the more money people have
- ✗ the more mobile/travel-oriented people are
- ✗ the more women who work
- ✗ the more independently young people consume
- ✗ the smaller households are
- ✗ the less popular kitchen work is
- ✗ the less time is spent with the family

... the greater will be the chances for the restaurant industry

## 5. Turnaround Way of Thinking

– customer orientation –



# Consumers : A Moving Target

## 2. Restaurants, Pubs, Cafés & Co.

For millions of people, the foodservice industry is providing

- the second kitchen
- the second living room
- the second apartment



15 to 25-years-olds are learning early to eat out rather than to cook!

The market for eating out: supply and demand on the move. Which megatrends will govern the restaurant business in 2000+? What does the consumer expect? How are innovative and successful entrepreneurs thinking and working? How is foodservice linked with other industries?

How do we move into the future? Essentials from a speech by Gretel Weiss, Editor-in-chief of this magazine, given at the Second European Foodservice Summit in Zurich in 2001.

## 3. Today's Consumer Wants

- more goods
- more quality
- more service
- more convenience
- more emotion
- more experience



The Value Evaluation

1. Several socio-demographic issues have a fundamental influence on the global development of foodservice. Moments of growth:

- disposable income
- the extent that people travel
- working women
- the extent to which young people are independent
- the trend to smaller households
- dislike of working in the kitchen
- amount of time spent with the family.

Of all these issues, the most crucial is that of women going out to work. As a direct result, they have less time to spend on household activities, less knowledge about cooking and generally derive less enjoyment from working in the kitchen.

3. As away-from-home eating becomes more commonplace, expectations increase. Consumers want more for their money: greater quality, service and convenience. They also expect foodservice to match their lifestyle in an emotional, experiential way.

**Next generation food and beverage concepts invariably start in urban locations.**

## 4. Made by Restaurants

- not a product label
- not a service label



➔ It's an experience label (F&B, service + emotion)

Success = 51% emotional power  
49% professional know-how

2. Hence the growing social impact of the foodservice industry. For millions of people, restaurants, pubs and canteens are taking the role of a second kitchen, second living room and second apartment. In many European countries, private households already spend between 1/4 and 1/3 of their food budget on away-from-home eating establishments. In Switzerland, for example, the average person eats out 3.5 times per week, including snacks.

4. Take a night out at a steakhouse. The term denoted a product label 20 years ago and a fullservice label 10 years ago. Today, it's becoming an experience label in many markets with diners wanting to experience the taste of outstandingly good beef served by knowledgeable waitresses in a colourful environment – a one hour trip to South America.

5. Restaurant development requires a new way of thinking. When brainstorming to create new concepts, foodservice

## 6. Consumer Benefits

– Development Poles –



# Consumers: A Moving Target

## FUNDAMENTALS

### 7. Growth and Expansion

at interfaces to work, leisure, shopping and travel



Multi-Option-Locations!

### 9. Peripheral Foodservice



### 8. Locations: Redefinition

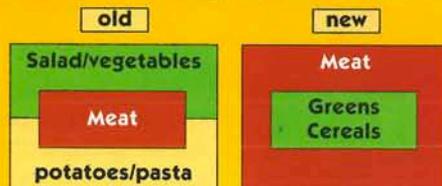
	old	new
Train station	get ticket departure	daily shopping, newspapers/ books, gift shopping - and eating/drinking shopping, 'duty free', meeting/conference - and eating/drinking
Airport	check-in, wait, take-off	'hanging out' with friends - and eating popcorn/ drinking Coke
Multiplex cinema	movie watching	groceries, print media, cigarettes, post office - and fast-food
Gas station	buy fuel	

all locations: top public transport/big parking lots

### 10. The Relationship to Health

70/80s	→	Calorie counting (= one-dimensional)
80/90s	→	Fitness (= two-dimensional)
90/00s	→	Wellness (= holistic)

### 11. Menu Planning: Centre Stage



Meat = beef, pork, lamb, chicken, fish

a + 2b

a + a + a

### 12. Changing Eating Habits

- De-structuring of everyday life
- De-structuring of eating rituals
- De-structuring of mealtimes
- De-structuring of meals itself
- Snack around the clock (24 hour society)

All things & tastes at all times!

operators need to think from the customer to the kitchen, not the other way round. It's essential to consider how guests think and behave, to understand their problems and aspirations.

6. Restaurants no longer simply sell eating and drinking. Their product must meet more complex demands:

- soothing the demands of stressful daily life.
- providing a 2 hour holiday from the daily routine.

Successful concepts must increasingly match one or other need, or even both.

7. The right location: The physical location of foodservice – often at the interfaces between work, leisure, shopping and travel – is also becoming ever more important to successful concept development. Restaurants have to go where people are, not the other way around.

8. Some of the most interesting locations, like airports, are in a state of transition. In the old days, people checked in and waited for take-off. Not any more. Today's traveller goes to the airport to shop, to have meetings, to eat and drink, not just to fly. And that change is only at its early stages.

9. It's not like building automobiles or serving in health care. A farm, a bookshop and a petrol station can be a player in the restaurant and snack market. Do they have an in-

nate competence in foodservice? No. Nice to have but not really a must.

10. Consumers are constantly redefining the reasons for making food and drink choices. In the Seventies, we only watched calories. Then fitness started to become a priority: eat healthy and play sports. Today, the name of the game is wellness: sensible eating, walking, biking, and living in harmony with body and soul by making the most of the environment.

**Foodservice systems have to respond to changes in many different ways.**

11. The meal focal point: Main meals traditionally put meat centre stage, surrounded by field products. Meat dominated the planning process, the merchandising and the perceived value of a meal. This structure still applies today but a new, less structured type of meal is emerging where large pieces of meat are not essential. It's a feminine rather than masculine approach, less formal and with salad, vegetables, pasta and bread being equally important ingredients. What about vegetarians? They will always be a relatively small minority: that's true even in the aftermath of the mad cow disaster. But some people can now be classed as part-time vegetarians or – more accurately – are no longer eating meat so often and in such large portions.

12. Changing eating habits: The structure of our everyday lives is changing immensely because families no longer automatically consist of mother, father

# Consumers: A Moving Target

## FUNDAMENTALS

### 13. Culinary Cultures

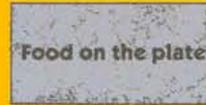
- polarisation
- fusion



Restaurants are the forefront of consumer shifts in food & beverages!

### 18. Eating Culture in a Hectic Society

Time has become **the** central factor



(Traditional)  
sit-down meals



Eating on the move  
Eating on the run

### 14. Fresh: most powerful word for the consumer Freshness: most striven for in restaurants

- Dimension**
- fresh ingredients (farm fresh, market fresh, garden fresh, harvest fresh)
  - freshly made (from scratch, display cooking, market restaurants)
- Menu items**
- freshly made pasta with garden-fresh herbs
  - home baked bread (oven warm)
  - freshly squeezed juices
  - coffee specialities (freshly ground beans)
  - natural seasonal cycles

### 15. Salad – up to the Top



Strong demand: women of all ages

### 16. F & B Frontrunners\*

Year	Food	Beverage
00	Wraps	Latte Macchiato
90	Salad bar	Mineral Water
80	Burger	Diet Coke
70	Steaks	Wine
60	Broiled Chicken	Soft drinks

\*researched for Germany, but similar in other countries

### 17. Between the Bread

Origin	Type
Italy	Pizza/Panini
France	Baguette (stuffed)
UK	Sandwich
Germany	Filled roll
Turkey	Pita/Kebab
Spain	Bocadillo
Mexico	Wraps
US	Burger



and children. Whatever the constitution of the household, its members no longer eat at the same table three times a day. Today's younger generation is less knowledgeable about cooking and less inclined to spend time in the kitchen. This basic loss in our society is a major gain for the foodservice industry.

**13.** Thanks partly to greater travel and partly to the impact of global restaurant concepts, today's daily meal choices draw upon culinary cultures from all around the world. Even fast-food chains now employ ideas and imagery derived from Mexico, China or Greece to widen choices and encourage customers to make 3 visits a week instead of 2.5.

**14.** Whatever the food, 'fresh' is fast becoming one of the most alluring and powerful descriptions on menus everywhere, from Sweden to Spain. It's hard to obtain a concrete definition of freshness, whether from consumers, chefs or foodservice managers, but this often misused term conveys an assurance of fresh, natural food. Its prime appeal is not just taste but the perception that food is specially prepared in individual quantities rather than mass-produced. It helps to provide a balance to the artificiality of urban life.

**15.** Salad: Over the past 20 years, the role of salad has changed from side-order to main plate dish, surrounded

by other food. Millions of people, especially women, see salad as fresh, natural, light, modern and easy. It's considered healthy, with an interesting taste. Placed in Mexican tortilla bread, salad has even made its way from plate to hand-held snack, ideal for take-away. Wraps are one of today's hottest trends, with salad aiding the image of a light, contemporary all-in-one composition.

**Wellness – let's call it 'Feel Good Food' – has become an important focus in the hospitality industry.**

**16.** Food and beverage frontrunners: Evolution, not revolution is the name of the game in eating and drinking. The transition from novel theme to mainstream concept depends on many details – ingredients, preparation, presentation, branding and advertising. But the latest frontrunners in various countries exhibit some similarities: they have ethnic roots (except in Mexico and Italy), are freshly made and serve as either a snack-meal or a snack-drink.

**17.** Meals between bread continue to be a key theme throughout quickservice, although not typically in the classic chef's repertoire. But today's enormous variety developed from Europe's very rich bakery culture adds many new dimensions and opportunities.

**18.** Ultimately, time has become the central factor of our lives. The real growth in the away-from-home-market is not sit-down meals and plates served to table but from eating on the move, eating on the run, grazing and take-away.

## SUMMIT

Jochen Pinsker: "Currently, two central developments characterize the away-from-home market: trading down and trading out." Pinsker is Senior Vice President Foodservice Europe of the NPD Group Inc., the leading foodservice market-research company. In 1997, they established the 'Consumer Reports on Eating Share Trends' (CREST) panels in Europe. Meanwhile, the online source is up and running not only in US and in five European countries but also in Canada, Japan and China. Russia and Australia have been piloted recently. The consumer panels are a source for information on consumer purchases of commercially prepared meals and snacks and are based on a representative sample of households. Information is recorded in a monthly diary which captures date and time of the visit, name and type of the eating place, etc. [www.npdgroup.com](http://www.npdgroup.com)



# Big 5: Consumer Facts

Trends and key developments in the away-from-home markets of the biggest European countries by Jochen Pinsker, NPD Group/Crest: what our guests think, what they do and how consumers are changing in the face of economic challenges. We have extracted six aspects from an extensive lecture given at the Summit.

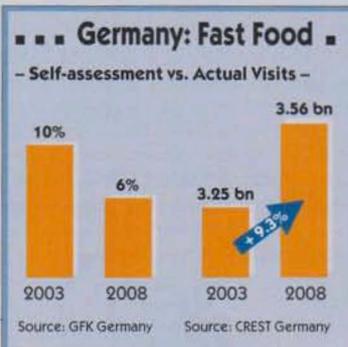


Surprising: Italy and Spain are the European leaders when it comes to per capita expenditures. One of the main reasons for this is that going out for a meal or drink has a very important and culturally anchored social function in both nations. The average eater cheque is relatively low, but there are more visits. Generally speaking, away from home consumption in the southern countries is characterised by more beverages (coffee!) and snacks, especially at breakfast time and in the evening (aperitivo respectively tapas).

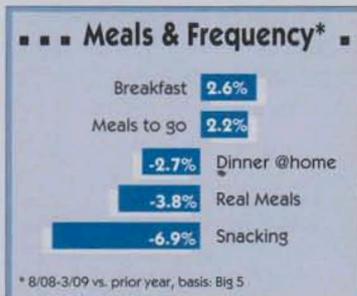
Nothing new but not to be forgotten, especially in tough times: people don't always do what they say what they do. For example Germany: in 2003, 10% of interviewees said they eat French fries, hotdogs and burgers at least once a week away-from-home, whereas the actual figure in 2008 was only 6%. However, the number of visits to fast food restaurants actually increased by 9.3% from 2003 to 2008.



1 HY 09 vs. 1 HY 08: visit counts slipped in all countries – by an average of 2.8%. The biggest drop was registered in Spain, the smallest in France. Full-service restaurants lost customers faster than the total market while quickservice concepts were more stable. The trend at the end of 2009: spending and traffic are climbing again slowly.



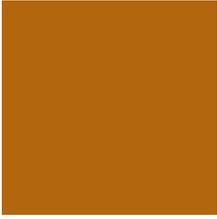
Two consumer reactions in tough times: trading down and trading out. People switch to cheaper places. And they skip add-ons, i.e., desserts, appetizers and beverages, to decrease their spending. Families in particular cut back on their restaurant visits and use retail food for dinner at home.



Another trading down & out effect: breakfast and take-away meals do well while snacks lose out badly. This development hits coffee bars very hard. And: where people cut down is a cultural thing. In Germany, UK and France, the tendency is to keep functional visits, in Spain and Italy the social ones.

# Essentials & Fundamentals

7



Este capítulo es un mix de temas que no daban, en extensión, para otorgarle dicho título pero con un interés e importancia como si dispusieran de él.

La sección **Essentials**, se inicia con un tema de curiosidad, no exento de anécdota. La incursión de McDonald's en el terreno hotelero, con un concepto rabiosamente innovador, si bien no lejos de algunos de cadenas, como Accor, en el segmento low profile.

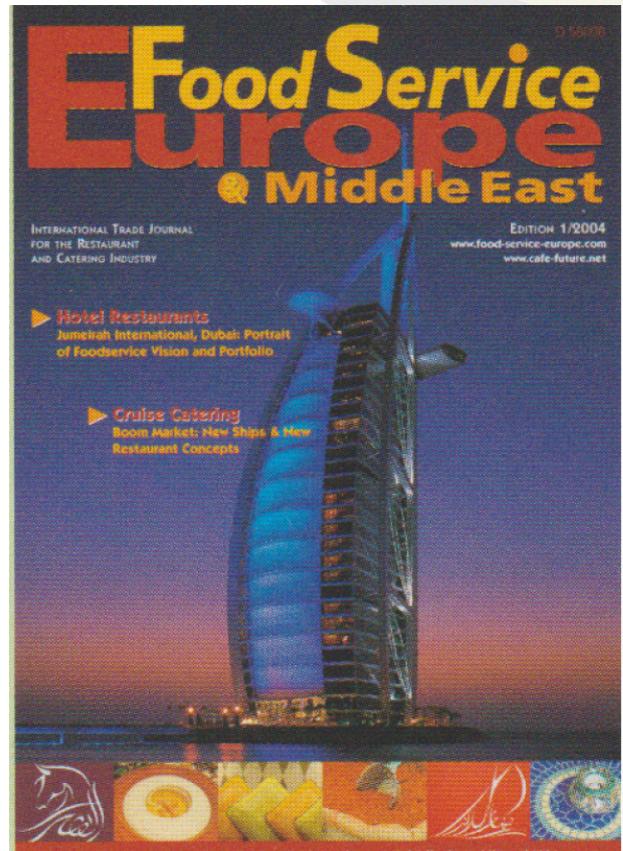
Su ubicación en Europa partió de un local cercano al aeropuerto de Zurich y por supuesto en un free standing con uno de sus restaurantes. Ignoramos (fui huésped) el motivo de la no continuación del proyecto, pero, la verdad, era tan disruptivo como notablemente funcional.

A continuación, se reproducen una serie de reportajes vinculados a las personas, ya sean como clientes de los restaurantes o sus empleados, tema que ya empezaba a preocupar en los primeros años del siglo XXI.

Le sigue una iniciativa encomiable por parte del profesor Chris Muller, en el marco de las relaciones con su otros dos partners en la Summit, que fue la de diseñar e impartir un seminario sobre marketing restaurant con el nombre de "Successful Multiunit Restaurant Management" y que ya, en su primera edición, tuvo 42 asistentes de 13 países, convocándose anualmente, en primavera, hasta años previos a la pandemia.

Como preámbulo a más editoriales de las responsables de la redacción de FoodService Europe (FSE), hemos querido darle singularidad al anuncio, en el primer trimestre del 2004, del cambio del nombre del magazine, al pasar de llamarse FoodService Europe a FoodService Europe & Middle East (FSE&ME), motivado por la decisión de cubrir la información generada en los países árabes por un incipiente foodservice, en la actualidad tan potente como se quiera describir.

La revista cambia pues su cabecera y enriquece su interior sobre rigurosos, extensos y útiles reportajes sobre los protagonistas del crecimiento del foodservice desde Egipto a Kuwait, pasando por los países (una pena, Siria) que en la actualidad son un referente en materia de inversiones, diseño



y restauración de marca, puesto que grupos financieros locales como Azadea, han creado los puentes, logísticos y financieros necesarios, para que ello pudiera producirse.

La ausencia de información sobre este mercado, en esta publicación, obedece a que se necesitaría más páginas a añadir, a lo que de por sí es ya el contenido elegido y porque desafortunadamente no llamó la atención, en aquel momento, de grupos españoles decididos a que su expansión internacional, que la tuvieron, pasara por países tan peculiares.

Bajo el título **Fundamentals**, se recogen, por un lado, escritos seleccionados y firmados por Gretel Weiss y Marianne Wachholz, las WyW, en los primeros números de FSE y en cuanto a **Entrevistas**, aparecen sólo dos de indudable interés. La primera, con quien tuvo la osadía de crear un conglomerado de restaurantes en las nuevas repúblicas post-soviéticas, incluida Rusia, inmediatamente de fragmentarse la URSS.

Rostislav Ordovsky-Tanaevsky Blanco, permanece con sus negocios en la actualidad, contra viento



y marea, en ese país, pese a la retirada de las principales marcas de restauración (excepto Burger King) como consecuencia del conflicto con Ucrania. En la parte II de este trabajo, se ha seleccionado una amplia documentación sobre la restauración de marca en Rusia y las consecuencias de la confrontación bélica.

Y la segunda, con un profesional norteamericano, Henry Mc Govern, que desde Polonia, creó otro conglomerado de empresas de restauración (hoy con su sede en Madrid) bajo el nombre inicial de AmRest's y que se hizo notorio por su claim, lema o slogan en una de las Summit, conocido como "Everything is Possible".

### Relación de documentación\* que se ha seleccionado para este capítulo

Sección	Título del Reportaje
Essentials	Artículos de interés
	"Wellcome to the Golden Arch Hotels"
	"Generation Y; Your News Employees"
	"The 21st Century Food and Foodservice Challenge"
	"Growth is an Outcome" Seminar"
Entrevistas	Rostislav Ordovsky -Blanco Tanaesky CEO de Rosinter
	Henry McGovern CEO de Amrest's
Fundamentals	Editoriales de WyW
	"Foodservice Goes Middle East"
	"Made for Learning from Each Other"
	"Thinking from the Guest to the Kitchen"
	"Changing Habits"
	"Home Away from Home"
	"Emotion & Experience"

Fuente: DFV Mediengruppe

Se desarrollan completamente, a continuación, los siguientes reportajes:

Essentials: "Wellcome to the Golden Arch Hotels"

Entrevistas: Rostislav Ordovsky -Blanco Tanaesky CEO de Rosinter

Fundamentals: "Foodservice Goes Middle East" y "Made for Learning from Each Other"

**\*Estos artículos pueden solicitarse a: [www.dfv-archiv.de](http://www.dfv-archiv.de)**

**ESSENTIALS**

## A New Arch

# Welcome to the Golden Arch Hotels.

Recharge your batteries and enjoy a few relaxing days in the new Golden Arch Hotels at Zurich Airport/Rümlang and Lully/Estavayer-le-Lac. Let us spoil you with the same high quality standards that have made the name McDonald's unique worldwide. We look forward to welcoming you soon.

- Top quality and fantastic value for money
- All rooms with sit 'n' sleep from Bico, the most comfortable bed on the planet
- Simple booking system and revolutionary Easy Check-in /-out
- First-class digital infotainment with WebTV in every room
- Fully equipped conference rooms in all sizes
- McDonald's Restaurant
- Golden Arch Bar
- AROMA Coffee Corner
- Fitness room with state-of-the-art equipment

LOOK 'N' BOOK & FURTHER INFORMATION:  
[www.goldenarchhotel.com](http://www.goldenarchhotel.com)

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Fax +41 (0)1/828 86 87

Golden Arch Hotel Lully/Estavayer-le-Lac  
Restoroute Rose de la Broye, A1/E25  
CH-1470 Lully

Phone +41 (0)26/664 86 86  
Fax +41 (0)26/664 86 87



**golden arch hotel™**

*be with us.*



The first hotel, at Zurich's Kloten Airport, opened for business on 18 March, a second hostelry, in Lully/Estavayer-le-Lac followed at the beginning of April. Both hotels have a McDonald's restaurant on



site (the one in Rümlang also has an Aroma). "Our aim is to create a synthesis of customer-friendly functionality and contemporary design," says Hammer. "But, most important of all, we want guests to feel relaxed and at home when they stay with us, in line with the McDonald's hospitality philosophy and our Golden Arch slogan: be with us! The unbridled passion for creativity is a quality highly prized by Jack Greenberg, CEO and member of the Board of the McDonald's Corporation, who, in his video link statement to the press conference, said, "I would like to pay my own tribute to the passion for innovation which has been the hallmark of McDonald's Switzerland for the past 25 years or more. Innovations are an integral part of our vision for the 21st century."

According to Hammer, the prerequisites for the realisation of this concept were excellent, namely the support provided by the "great" McDonald's brand, existing logistics and real estate synergy and a constantly growing demand for hotel beds. "Tourism and leisure time offer enormous development potential. People want to go out and experience something different. I am extremely optimistic about the future." An opinion reinforced by 70 million Swiss McDonald's customers and the approximately 6,500 members of staff employed in their 116 restaurants. "If we are only able to turn every thousandth customer into a Golden-Arch guest, then both of our hotels will be fully booked for the whole year." Was he afraid of any preconceptions that, with Golden Arches, McDonald's is creating fast-food hotels? "No. Our logo

### Restaurants

In catering terms, McDonald's relies entirely on its own brands. Every hotel has a McDonald's restaurant, a Golden Arch Bar and drinks dispensers in the corridors. The hotel in Rümlang also has an Aroma coffee shop. The McD restaurant design has also been revamped for this new venture. "The main design theme is a combination of nature and technology" explains interior designer Corinna Kretschmar. "The layout was based on Feng Shui elements, symbolised by a tree which extends right up to the first floor, cordoned off by a wall of turquoise glass bricks." The front of the counter is made of a section of rock (nature) adjacent to a corrugated aluminium screen (technology). The colours used; red, petrol green, maple wood. Steel, glass and stone draw on the ambience of the rooms as well as the curved gallery. The children's room, which contains a two-tier slide, is a highlight in itself. The hotel in Rümlang, which can comfortably seat 260 guests (216 inside and 45 outside), is open from 6 a.m. until midnight and serves a generous breakfast menu, including musli, yoghurt and cornflakes (sfr6.90 - 8.90), in addition to the familiar product range.

symbolises a style, energy, tradition and philosophy, which is synonymous with top quality, excellent service, meticulous cleanliness and reasonable prices. These are our family values and the same elements sustain a good hotel as a McDonald's restaurant, i.e. convenience, reliability and hospitality." The aim is to offer guests what they want: total transparency concerning service, operations and prices.



In the restaurant, as in every other part of the hotel, the interaction between the various materials builds a bridge between nature and technology: organic shapes crop up next to latticed surfaces and wood is combined with glass and steel.

So, what does the new concept look like in operational and design terms? Project manager, Corinna Kretschmar, recalls: "Numerous experiments were conducted after we had posed the question as to how a hotel functions. We reassessed each function and started off by questioning a great many aspects."

The result is a young, innovative concept, a new hotel experience. Many of the attributes of a traditional hotel, including the reception desk, have been abolished as far as possible; traditional room divisions have been abandoned in favour

For interior designer Corinna Kretschmar, the Golden Arch project represents "a major professional milestone. Here we were able to combine our experience in the hotel sector with what we had learnt from designing 100 McDonald's sites." Corinna Kretschmar manages joehnk. Interior Design AG in Zurich, together with Holger Pienitz. joehnk. Interior Design is the largest interior design company in Europe.



of large open-plan accommodation, offering a high degree of multi-functionality and freedom. McDonald's have lent heavily on technology. "The major design theme is based on high quality materials and clean lines", explains Kretschmar. The use of Feng Shui elements is intended to promote a feeling of well-being.

So don't expect to find a traditional reception desk in the lobby. At Golden Arch, guests are greeted personally and taken to one of the manned check-in points, where they can choose to check themselves in and out if they prefer. Just as with restaurant menu boards, guests can create their own personal accommodation menu - the different room categories and prices are

# A New Arch

## HOTEL

displayed on monitors. The motto here is speed and simplicity. Internet

booking is seen as important, with discounted prices offered to guests who book accommodation via the Golden Arch Hotel homepage.

Multi-functionality is another dictate. For example, each guest is given a trolley at check-in and this serves initially as a luggage trolley and later as a luggage stand during the stay. The hotels' 24 sqm rooms are furnished with special Bico Sit'n sleep beds, which convert from a couch to a comfortable bed at the press of a remote control button. The TV features a special information and entertainment system, complete with integrated Internet access. The TV console, which has been developed specifically for the hotel group, rotates and comes with a cordless keyboard. An oasis of individuality where lifestyle meets the information age. Special chairs and a range of lighting has also been developed for the new hotels. Open shelving and hanging space replace cupboards and drawers, ensuring that nothing is left behind at the end of an average 1.4 day stay. The concept of total transparency also applies to the shower, which comes without doors and is inte-



the town.\* A good 25% of customers book their rooms via electronic channels (booking system or internet). \*In view of the attractive pricing system, this percentage is likely to grow in the future, too.\*

And if all goes well? Will Golden Arches expand globally as the restaurants have done? "It's still too early to answer that question," says Hammer with a grin. "We will have to assess the first two hotels and their results first. However, come what may, we in Switzerland are proud to have been given the opportunity to demonstrate that hotels are a worthwhile, sensible and forward-looking extension of the McDonald's brand.\* He is confident that, if the hotels are successful, nothing will stand in the way of a multiplication of the concept. "Who knows, the potential synergy between hotels and restaurants, particularly in terms of the environment, energy conservation, real estate and employees, could prompt us to develop this project into a hotel chain. As far as foreign countries are concerned, the responsibility lies with our partners to take that decision at the appropriate time". And, since mid-March, their attention is focused on Zurich – just like the rest of us. KH

out, i.e. performed by an external service provider. To round off the portfolio of accommodation, the hotels have both small and large meeting rooms (bookable without accommodation), a fitness room and children's playroom.

The target group? During the week, McDonald's will rely heavily on business travellers and, at weekends, on families with children looking for an exciting ex-

### There's no contradiction between running a quality restaurant and a quality hotel.

Urs Hammer

perience. The management is currently still in negotiations with potential event and entertainment partners. A professionally run crèche, open at certain times, will give parents free time for relaxation. The company is pleased with the initial reactions. "We are booked up from Tuesdays to Thursdays, when most of our guests are business people," says Hotel Manager Beat Kuhn. The weekends are not developing so quickly so McDonald's is hoping for more families when they really start beating the advertising drum for the event calendar with its new programme every week. Kuhn is proud of the broad structure of his guests – "from young to old" – and that a good 35 – 40% of them use the McDonald's and Aroma restaurants. "Lots of them are pleased they can get something warm to eat late in the evening and a good breakfast in the morning. Guests who don't eat here generally have an appointment in



grated into the room, thus serving a design function as well as a traditional one. Then there's a generously proportioned vanity unit with a spacious surface for toiletries. The WC is the only part of the accommodation that has a door. The WC is tiled, the entrance area covered with granulated flooring and the room itself with maple parquet flooring. This combination of materials and the layout of the room is designed for "maximum hygiene". Incidentally, the housekeeping services for both hotels are contracted

### ■ ■ ■ Vision, Mission & Objectives ■

#### ■ Vision

We create a new type of accommodation and quality of service. A brand

- which is distinctive,
- fresh, fair and friendly,
- which appeals to a broad customer base,
- is synonymous with total relaxation and
- conforms with McDonald's QSSP philosophy

#### ■ Mission

We offer our customers

- the 'Golden Arch Feeling'
- exceptional service
- a place to totally relax
- total transparency concerning service, operations and prices
- more than they expect

#### ■ Objectives

- Golden Arch aims to be a hotel chain with a culture all of its own
- Golden Arch aims to position itself as an innovative mix of business and event hotel
- Golden Arch aims to appeal to the medium price segment, providing a product of above average appeal
- Golden Arch aims to offer entertainment and events

# ENTREVISTAS

## INTERVIEW

Since returning to his Russian roots in the 1980s, Rostislav Ordovsky-Tanaevsky Blanco has made a remarkable contribution to the restaurant scene in Moscow, St. Petersburg and other major cities. As founder and president of Rostik Restaurants Group (Rosinter), he has helped create several new concepts in quickservice and casual dining sectors as well as spreading international franchises like TGI Friday's and Benihana. In building Russia's second largest restaurant business (after McDonald's) he has provided the country's fledgling food-service industry with a positive example in terms of professional management and business conduct. Interview by Bruce Whitehall.

[www.rosinter.ru](http://www.rosinter.ru)



# Russian Revolutionary

### How did you come to be involved in the Russian market?

**Rostislav Ordovsky-Tanaevsky Blanco:** I first came to Russia, from Venezuela, in 1984. I was impressed by many things but two findings in particular suggested commercial opportunities. Firstly, I found it very difficult to buy and process rolls of film. At that time, I had a joint venture distribution arrangement with Kodak in Venezuela and they were supportive of my developing interests elsewhere. So I talked to them about Russia and in 1988, they asked me to join them and take over all their commercial and retail projects in Russia.

Secondly, I could not find a place to eat. At that time, there was no private ownership in the Soviet Union. Everything was state-owned and that included restaurants as well as hairdressing shops, laundries, jewellery stores, book-stores, taxis and so on. Everything had one big owner – the government. There were few restaurants and those that existed frequently had funny signs on their doors, like 'closed for lunch', 'closed for

sanitation', 'closed for administrative purposes' or simply 'no seats available'. So I could see opportunities.

### Did you have foodservice experience?

**O-T B:** I contacted the most important restaurateur in South America – David Epelbaum, who had a big chain of restaurants in Venezuela called Tropi-Burger. He was (and still is) a leading entrepreneur and he came with me to the Soviet Union. When he saw the magnitude of the opportunity he concluded

**In the old Soviet days, you would go to a restaurant only 2-3 times a year, if at all.**

that we needed a big brand and he got Burger King interested. By 1988, we were getting ready to launch units under licence but, after two years of hard work,

site selection and all the other processes, Burger King got cold feet and decided not to proceed. They felt it was too risky.

### Did that discourage you?

**O-T B:** By that time I was representing Kodak in the Russian market and had started to operate the country's first modern film processing business, trading in roubles. We had the rights to sell various goods but biggest demand was for film processing and I found out that a restaurant could be classified as a production facility, which would enable us to sell our own products in hard currency. In my work on the Burger King project, I had received a great many proposals for sites and one in particular interested me: convert half the lobby of the Hotel Moscow, close to Red Square, into a restaurant. That led to the opening of my first restaurant in July 1991. It was called Spanish Corner and was a Spanish tasca-style restaurant.

### What inspired the choice?

**O-T B:** I thought: what do I know best? My mother is Spanish and my father is Russian so if I open a Spanish tasca

restaurant in Moscow I will kill two birds with one stone. It will get me started in the restaurant business and I will honour my parents.

I started it as an entrepreneurial opportunity and as a way of generating more income in dollars. But within six months that restaurant became very profitable and I quickly started looking for a second. In November 1992, I

**For foreign operators considering business in Russia, the biggest challenge is to be adaptable to changes in the market and the country.**

opened a Swiss restaurant called Le Chalet, which was the first of its kind in the Soviet Union to serve dishes like raclettes, Caesar salad, fondue and steak tartare. It was a fine dining restaurant and, while it probably could not have been able to compete with one in the West, it had the biggest wine list in this part of the world.

Then came Patio Pizza and Rostik's (casual dining and quickservice respectively) and they are now our main vehicles of growth. Rostik's sells classic fried chicken and french fries but the menu is otherwise very different from American fast-food in having genuine Slavonic popular dishes like home-made soups, puffs and patties. The menu also includes shish kebab, a wrap style product called Giant, pelmeni (Russia's popular ravioli-style dumplings with beef

**We think that Rostik's can become the Russian national brand in quickservice.**

and pork fillings). Bread is baked off on site. We think that Rostik's can become the Russian national brand in quickservice. Patio Pizza is Italian casual dining.

**How much competition do they have?**

**O-T B:** We don't have the competition from mom and pop Italian restaurants you see in other countries. In terms of

## Rostik Group

With its head office in Moscow, the Rostik Group comprises several inter-related businesses:

Construction and development of public catering enterprises (including restaurants and fast-food outlets). Photo-services. Tourism. Food delivery. Production of semi-finished products, bakery and confectionery.

The Rosinter Restaurants division, founded in 1991, controls and operates restaurants mainly in Russia and the CIS (Commonwealth of Independent States). During 2002, the number of its restaurants increased by 70% compared with 2001 and the company has predicted annual growth between 2003 and 2005 of 35%, reaching a target of over 190. Of these, 70% will be located in Russia and 30% in Europe and the CIS. It opened its 100th restaurant in January 2003 and at press-time had 105, making it Russia's second largest restaurant business after McDonald's, which first appeared in Moscow at the end of the 1980s.

Rosinter originated in 1991 as a combined restaurant and photo business, with the two split in 2000 and Rosinter Restaurants formed. Activities are spread over several areas and include:

**Rostik's** – mass market fast-food chain featuring fried chicken and Slavonic dishes (home-made soups, pelmeni, puffs and patties). Since 2000, Rostik's has been available as a franchise. Of 38 branches currently, most are town centre but with growing interest in sites within large supermarkets and near petrol filling stations. Average spend: \$5, average net annual sales per unit: \$1.2 m.

**Patio Pizza** – 25 Italian-style tableservice family restaurants with pizza prepared in wood-burning ovens and large salad bars. Average bill (including drinks): about \$19, average net annual sales per unit: \$2 m. Branches in Moscow, St. Petersburg, Minsk, Omsk, Almaty, Kiev, Riga, Bratislava, Novosibirsk.

**Planet Sushi** – 13 restaurants featuring Japanese cuisine, with focus on over 50 types of sushi (nigiri, maki, emaki, etc.) made by chefs from fresh produce. Branches in Moscow, Novosibirsk, Almaty, St. Petersburg, Riga and Minsk, average net annual sales per unit: \$1.5 m.

**TGI Friday's** – American casual dining restaurants licensed from Carlson Hospitality with 11 branches in Moscow. In 2003, a branch is due to open at Moscow Sheremetievo-2 international airport, average net annual sales per unit: \$2.2 m.

**American Bar & Grill** – Five American style late-opening outlets with a 'rancho' design. Branches in Moscow and Almaty.

**Benihana of Tokyo** – Japanese steak-houses. Moscow branch opened under license in 2003.

**Azabu** – Oriental menu quickservice concept for food courts. Two units under trial.

**Santa Fe** – Latin American, Mexican and Japanese casual dining plus sports bar.

**Moca Loca** – pilot for coffee house chain.

**Siberian Crown** – joint beer restaurant venture in Siberia with Sun Interbrew company, featuring Russian beer and cuisine.

chains, there is Pizza Hut but we see them as closer to quickservice whereas we can provide guests with a full menu of pastas, mussels, etc, as well as a gourmet range of pizzas.

Sbarro, which is franchised here, has done a good job and gained a slice of the Italian food market but they are more selfservice fast casual with a price range between quickservice and casual dining. We also have Domino's with about six units. I think they have a chance to become leaders in pizza delivery. They have been doing it some time here, with good management.

**How is the market changing in terms of service formats?**

**O-T B:** Our combined Patio Pizza and Rostik's unit on the main road in from Moscow airport is our first self-standing building on classic US roadside lines and we expect to build many more even though it is quite difficult – and expensive – to develop this kind of site. There are not many available and a lot of competition from other players. But they benefit from the growing mobility of the population. The Rostik's in this unit is our first with drive-thru as well as eat-in and take-out. There are cur-



## INTERVIEW

### Personal Perspectives

#### What family connections do you have with Russia?

**O-T B:** On my father's side, we are White Russians and by that I mean anti-communist Russians. My great grandfather escaped in 1917 – he was the last governor of a big Siberian region called the Tobolsk region. My father stayed on but after the Second World War he emigrated to Venezuela. There he met and married my mother, who had left Spain after the Civil War looking for opportunities in the New World. I was born in Caracas.

#### How did you come to return to Russia?

**O-T B:** By 1984, I had built up interests in film in Venezuela and I got an invitation to a film festival in the Soviet Union; they wanted me to buy copyrights for some Soviet movies. I checked it out and it appeared safe to go. So I made a visit and found interesting opportunities.

#### Who in the world do you most admire?

**O-T B:** I admire people that always have an ethical behaviour and act in agreement with his or her conscience. Jesus Christ is the top example. Keeping the proper distance, I would also mention Simón Bolívar, the South American leader who led the independence movement.

#### What foodservice industry figures have inspired you most?

**O-T B:** Top of the list is Ray Kroc of McDonald's. His biography is always a source of knowledge and inspiration. Rich Melman, the founder and current owner of 'Lettuce Entertain You' is also a person I much admire. I would also mention Richard Sneed from TGI Friday's and Steve Finn from Leeann Chin. Their experience, knowledge and

ethical behaviour have been an example and source of knowledge for me.

#### What are your favourite foods?

**O-T B:** Fondue, raclette and Japanese food.

#### Which Russian restaurant do you like best?

**O-T B:** I would have to say that the best restaurant is home. Second to my wife's cuisine is Cafe Pushkin and also the many Georgian restaurants that you can find in Moscow.

#### What are the biggest challenges facing foodservice chains in Russia?

**O-T B:** With the country new to private enterprise and the market economy, we started at zero and had to do everything from scratch. But while we are the biggest operator in Russia we are still very, very small. That requires continuous focus on creation and development, which I love. On the minus side, tremendous effort is required for even basic things to be accomplished.

Today almost all operators are still in the entrepreneurial stage and maturing to the next stage is needed – soon. For foreign operators considering business in Russia, the biggest challenge is to be adaptable to changes in the market and in the country.



rently only about 25 drive-thrus in the whole of Russia and some McDonald's units with drive-thru are now getting 40% of their business through that channel.

Home-delivery is tiny as yet but people's habits are steadily changing and delivery revenue is now up to 22% for some of our Patio Pizza restaurants in the suburbs. We give a discount to the delivery company and they deliver at standard restaurant prices.

#### Why, fundamentally, is the market growing?

**O-T B:** When we first started, our customers were mostly non-Russians. There were elite people about with a lot of dollars but times were difficult for the masses. So we went into fine dining. But we have found since then that the real vehicle for growth is casual dining and quickservice. Now we only do fine dining restaurants as opportunistic and one-off projects. If we find the right chef-

partner, we do it, but it's not our speciality.

In the old Soviet days, you would go to a restaurant only 2-3 times a year, if at all. Now, there is a growing trend for people, especially younger generation maturing and getting more money, to eat out more. They don't have the limitations of the past and going to a restaurant is now becoming a normal activity, a regular part of people's lives.

**Patio Pizza and Rostik's are now our main vehicles for growth.**

#### What determines your locations?

**O-T B:** We have 105 sites all over Russia and the former Soviet states. We have a lot in the centre of major cities but are also now attacking the suburbs quite heavily. We are also looking outside of Russia and have trial operations in Prague, Budapest, Bratislava and Vienna.

Developing in a Western direction is promising but it has not been easy, especially in Vienna. We definitely cannot understand how the Viennese restaurants operate because with \$120-140,000 sales per month – which is not a lot although it is more than many Austrian restaurants generate – we have \$80,000 of labour costs (i.e. 60-70% which is a lot higher than we have in Russia, where it is between 14 and 20%, with 20% the maximum).

**There are currently only about 25 drive-thrus in the whole of Russia (mostly operated by McDonald's).**

So there is something which we are not doing properly. We have reduced labour to the bare minimum so maybe it is the way we are paying our people. We have the feeling that you just need to be a little bit creative in the way you declare your revenues in Western Europe, especially with a one-off restaurant. We declare all our revenues and pay all our

# Russian Revolutionary

## INTERVIEW



Featuring fried-chicken and Slavonic dishes: Rostik's (38 units). Italian-style table-service restaurants: Patio Pizza (25 units). Planet Sushi is serving Japanese dishes with focus on over 50 types of sushi (13 units).



taxes but it does not look to be a smart way to survive.

### Does franchising offer an expansion route?

**O-T B:** Franchising has been important to our growth with our TGI Friday's license from the US group Carlson. In February this year we opened the first

**When we first started, our customers were mostly non-Russians. Now there is a growing trend for people to eat out more.**

branch of the international Benihana of Tokyo franchise, as also operated in London. We ourselves have also become franchisors, principally at the moment with the Rostik's brand.

We started franchising eight years ago but it was an unusual arrangement where we owned 51% of the company outside of Moscow and that company franchised from us. It was a testing process. Now we are doing schemes where the franchise is 100% owned by a different entity. We have about 15-20 franchisees.

### Marketing

Rosinter Restaurants has evolved programmes to help the company quickly monitor changes in demand and develop the most effective marketing activities to attract new customers. In 1998, it introduced 'Honoured Guest', thought to be Russia's first customer loyalty programme. It was based on provision to guests of a free plastic card on which they can accumulate 10-20% bonus points, which are added to their accounts when they pay their bills. Over four million guests now participate in the programme. The scheme is set up so that guests can be given individual incentives. It developed further in 2002 with input from Visa International and Guta Bank to create the VISA Honoured Guest plastic card, claimed to be Russia's fastest growing co-branded card. By the end of 2002, cardholders numbered 60,000 with 170,000 targeted by the end of 2004.



# FUNDAMENTALS

## VIEWPOINT

# FoodService Europe Goes Middle East



**The editors**  
**Gretel Weiss (GW)**  
**Marianne Wachholz (MW)**

We've been working on this move for almost a year. Many readers, friends and business partners have already got wind of it, so now the time has come to make it official: FoodService Europe – launched in 1998 as a trade magazine for professional and multinational oriented players in the away-from-home market – is expanding its field of activity. From the next issue, we want to serve the restaurant / catering sector as a specialist platform not only in Europe (and North America) but also in the Middle East. We plan to report on important markets, such as those of the United Arab Emirates (UAE), Egypt and Saudi Arabia. At the same time, we aim to provide a business window to another part of the world for entrepreneurs and managers in these countries. We are well aware that this is an ambitious vision. However, we see a variety of chances and they outweigh the risks by far: the paramount aspect is content & community, in other words, expertise and networking for an international family of professionals. Foodservice solutions – products, concepts, marketing and management – are the main themes of FoodService Europe & Middle East. Our trade magazine steers well clear of political questions.

It is a great pleasure for us to announce this significant expansion and to implement it next year. Without doubt, you will now ask why we have decided to expand into the region between Europe and Asia? Yes, indeed, why?

To be honest, the wish comes not so much from our offices as from the readers and customers of FoodService Europe. And this was one of the reasons we travelled to Dubai for the Gulfood Exhibition in February 2003. After a good two days, there was no doubt in our minds: „let's do it“. Because, Europe and the Middle East have an incredible amount to learn from each other when it comes to the hospitality business. In this connection, two things are particularly striking: tourist hot spots, such as Dubai and Sharm El Sheik, hold an undisputed cutting-edge position in the important hotel-restaurant segment. Anyone who, over the last decade, flew to Las Vegas to study really future-oriented concepts now travels to the Gulf States. And does so in half the time, too. For the hospitality industry, Dubai – which has the world's highest density of 5-star hotels and a whole bunch of breath-taking projects on land and water – has become a brilliant star on the horizon.

But that's not all: people have a greater choice of

American restaurant brands in many Middle Eastern countries than in any European city. All in all, one can safely compare the culinary wealth of this interface between east and west with that of London or Paris. And this, albeit in an extremely truncated fashion, is what makes the region between the Mediterranean and the Arabian Gulf so fascinating.

Looking from the Middle Eastern standpoint – rapidly growing markets with as much as 80% of equipment and F&B, as well as management and staff, coming from abroad – tried, tested and successful products, concepts and restaurant chains from the west are of great importance, especially for the development of tourism. In particular, spectacular growth in tourism and business calls for global sources of foodservice expertise. The East-West perspective is underscored by two additional facts:

1. The F&B structure (hotels, fast-food companies, contract catering) of the majority of large organisations in the Middle East is dominated by Western specialists. The operative managerial culture in the bulk of companies in the region is more European than Asian. And this holds equally true of planning and consulting.

2. Nowhere in the Middle East – regardless of national and religious boundaries – is there an editorial-driven trade magazine that continuously supports the main players of the foodservice sector. At the same time, our research in recent months has shown an immense demand for exactly that.

Thus, from the next issue, this trade publication will expand its title and scope. Every issue will comprise 70-80% European and 20-30% Middle Eastern insights. The print-run will be increased by 20% to cover weighted distribution to an additional twelve countries. And, once again, we are starting with free subscriptions. Naturally, the launch date has also been fixed: on 21/22 February 2004, we will present our 'bigger' magazine in the J.W.Marriott Hotel in Dubai – parallel to a CMA show with Food from Germany. Yes, we're looking forward to becoming the voice of the foodservice industry in the Middle East. Readers, friends and business partners, let us know your opinion. Ask for more information. Let's share in the excitement.

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## VIEWPOINT

# Made for Learning from Each Other



**The editors**  
Gretel Weiss (GW)  
Marianne Wachholz (MW)

It's a great moment: our first issue with an enlarged scope – with news and reports from not only Europe but also the Middle East. From now on, every issue (quarterly plus an annual Trend Book) will serve both regions. Accordingly, we would like to offer a warm welcome to our several thousand new readers. We are looking forward to catering for their high expectations – and to their response. The echo from our test distribution to selected recipients in Egypt, Lebanon and the Emirates of Dubai and Abu Dhabi was nothing less than sensational. This strengthened the resolve of the Deutscher Fachverlag, the publishers of FoodService Europe & Middle East based in Frankfurt am Main, Germany, to significantly extend the distribution radius of this multinational magazine six years after its launch.

**The idea of expanding** FoodService Europe to the Middle East grew out of a genuine need expressed by two different groups of people.

**1.** Foodservice and hospitality executives whose careers have taken them from European to Middle Eastern operations. Working in a region where almost all equipment, food and beverage products – as well as much of the know-how and management skills – are imported, these executives rely heavily on international contacts.

**2.** Advertising clients who urgently need a trade magazine that is editorial not product driven, to help them access important growth opportunities in the Middle East. We have examined and responded to these needs.

**The market:** with more than a dozen countries and 250 million people, the Middle East region ranges from very poor, underdeveloped economies to extremely rich and highly developed nations. There have been massive changes in the oil industry and tourism over the past 20 to 30 years, and these changes are reflected by the dynamic developments taking place in the foodservice and hospitality sectors. Dubai, in particular, has spearheaded tourism development, leading to the phenomenal rise of the country as major holiday destination with world-class attractions. Growth has been spectacular in a handful of key countries. Anyone wanting to study cutting-edge foodservice and tourism projects must go to Dubai, which is now the leading place of pilgrimage for the global hospitality sector. Once upon a time, Las Vegas was the top destination for discovering trends and entrepreneurial dreams come true – long ago in the last millennium.

**Two things stand out** in Dubai:

- the world's highest concentration of 5-star hotels, most of which can boast F&B sales accounting for over 50% of total revenues, and
- more American fast-food/restaurant brands than in Europe.

Here as elsewhere in the Gulf, the pace of change has been breathtaking. Numbers tell an equally dramatic tale. The population of the United Arab Emirates has increased 35-fold since 1950, while the area covered by the city of Riyadh has grown 100-fold. In Oman, electricity output has risen 670 times over the past 30 years, the number of telephones 420 times and the number of doctors 260 times. In Qatar, average incomes and average wealth have grown 200-fold since 1960.

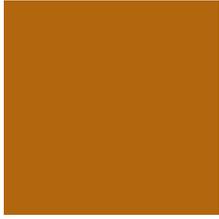
Almost all of the numerous big projects and large operations now emerging in key Middle East markets are being driven by international chains in the fast-food, hotel/restaurant and contract-catering segments. As well as influencing concept design and management, Western operators (both European and American) also play a very important educational role. They are inspiring the emergence of a whole generation of successful foodservice entrepreneurs and managers in the same way as companies like McDonald's and Moevenpick did for Europe in the 70s, 80s and 90s.

**From a European perspective,** looking east will certainly be as important as looking west over the coming years. In this connection, it is important to be open to the different ways of thinking and the business models of other cultures at the interface to Asia. The peoples of the continent between Ireland and Russia, between Norway and Italy and the Middle East have much to learn from each other when it comes to the foodservice business. It is the aim of this trade magazine to provide content and community, in other words, expertise and networking for an international family of professionals. In fact, great foodservice solutions – products, concepts, marketing and management – are our main point of focus no matter where they originated.

**Gallery**

**8**





Quien haya llegado hasta este capítulo de la parte I de la *Recent History of the Foodservice Market in Europe*, es que es un apasionado de este sector.

Habrás conocido aspectos de su desarrollo -en ocasiones- relatados en primera persona; con cierta nostalgia pero también con interés en dar a conocer que detrás de toda actividad, existen las personas.

En este caso el protagonismo es para Gretel Weiss y su team; en especial de su colaboradora Katrin Schendekehl; no deseando olvidar lo que supuso también Daniel Majonchi, en su rol de querer unir a todo el foodservice europeo (un precedente lo tuvo la celebración de CIR98 en Barcelona reuniendo cadenas europeas y norteamericanas) desde Leaders Club International y mantener la llama asociativa en su país durante los últimos 30 años.



*Gretel Weiss y Katrin Schendekehl*



La relación con Gretel Weiss parte de su aterrizaje en Barcelona, en 2000, con un grupo de directivos de importantes cadenas alemanas de restauración de marca que harán un study tour del que quedarán sorprendidos con lo que visitan.

*Road Map para visita a Barcelona en el año 2000*

Un segundo e inmediato contacto surgirá cuando me invita a visitar la feria Internorga, para participar en un congreso de foodservice que, en la actualidad, reúne



*Gretel Weiss y Mario Cañizal en Internorga 2000*

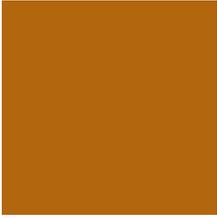
en Hamburgo a más de 2.000 profesionales cada año, y hacerme participe en medio de una cena de gala, del agradecimiento por la preparación de la visita a Barcelona.

A partir de ahí y usando a Katrin Schendekehl como “go-between” su revista y la Summit comienzan a informar a sus lectores de como se desarrolla el sector de food service en España, casi en cada número que edita o evento que organiza.



*Katrin Schendekehl y Mario Cañizal en Internorga 2000*

Además, es testigo directo de esa evolución con visitas frecuentes a España para dar charlas en eventos como el congreso de EFEDA (2001) en Barcelona, Expo Foodservice (2004) en Madrid o en un seminario de AECOC (2016) de nuevo en Barcelona. En 2023, la revista Caternews la entrevistará para sus lectores en España.



*Gretel Weiss en Madrid durante ExpoFoodservice 2004 junto a (de izq a dcha) James Doherty (NRN), Phill Romano, (Macaroni Grill) y los editores de Restauración News*

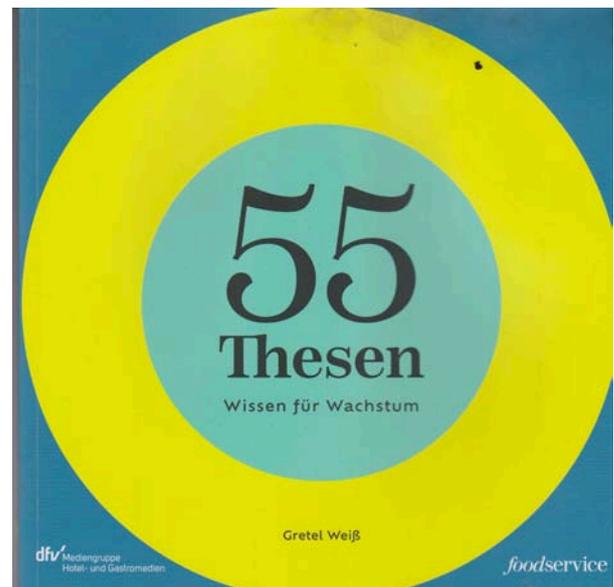
Han sido mas de 20 años de relación profesional que no se ha extinguido ya que, pese a que ambos nos hemos retirado de la primera línea de fuego, seguimos en contacto. Ella desde su casa familiar en Plochhingen en la región de Schwaben perteneciente al länder de Baden Wurtemberg, donde su ADN de granjera le ha permitido conectar con los productos de su tierra natal, estando dispuesta, ahora, ya no a encargarme un reportaje sobre tal o cual apertura, sino de enviarme la receta de cómo hacer una frikadeller, mientras ella espera que le diga, desde Barcelona, como asar y comer calçots.

Pese a esa correspondencia culinaria, Weiss no ha dejado de asistir a los eventos que organizó y de escribir ahora sus reflexiones profesionales en libros como 55 Thesen, mientras al que leen algo similar

hace, elaborando una colección de e-books que relaten sus actividades profesionales.

Regresando al capítulo, tiene ante Vds uno de los Rankings (1995) elaborados anualmente por la revista NeoRestauración Magazine en los noventa.

Termina el capítulo y el e-book con una reseña de la conmemoración de los primeros 10 años de edición de FSE&ME, aprovechando para que puedan conocer el equipo de Contributing-Authors del que dispusieron Gretel y Marianne, para llevar a FSE&ME a ser tan reconocida revista profesional, a nivel internacional.

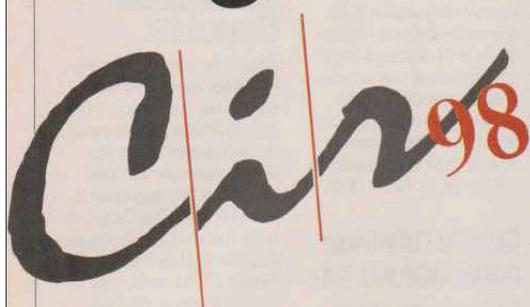


L'essentiel **À L'ÉTRANGER**

**BARCELONE**

22 & 23 janvier 1998 - Hôtel Arts

# Le grand rendez-vous eu



A l'occasion de la deuxième édition de la Convention internationale de la restauration 98 (CIR 98) organisée par le Gira Sic et Néo Restauration Magazine, plus de 300 responsables de la restauration européenne se sont retrouvés à Barcelone à l'hôtel Arts Ritz Carlton pour un grand rendez-vous d'affaires. 170 sociétés, 15 nationalités, venues de toute l'Europe mais aussi d'Amérique du Nord et du Moyen-Orient étaient représentées. Sur scène, 19 intervenants (voir photos ci-contre) se sont succédé pour présenter leurs concepts lors d'une intense journée de travail qui s'est terminée fort tard. En effet, une des originalités de CIR réside dans la prise de rendez-vous immédiats, programmés informatiquement entre auditeurs et présentateurs. De fait, cette formule, mise au point lors du premier CIR en janvier 1996 à Genève, a une nouvelle fois fait ses preuves à Barcelone. Plus de 220 rendez-vous individuels ont ainsi eu lieu entre - futurs - partenaires. Une très large majorité des participants en ayant manifesté le désir, CIR 2000 se tiendra dans une autre capitale européenne. Un lieu et une date peuvent être d'ores et déjà avancés : Londres, les 21 et 22 janvier 2000.



Salon Gaudi, hôtel Arts Barcelone jeudi 22 janvier, 8 heures (1). Plus de 300 personnes se préparent à écouter les interventions de 19 participants qui vont se succéder à la tribune tout au long de la journée, dont Laurent Caraux (France) pour El Rancho (2), M. Philip Jenny (Etats-Unis) pour Diner Concept (3), M. Lezama (Espagne) pour Carmen La Comida de España (4), M. Bisio (Etats-Unis) pour Popeye's/Church's (5), M. Wingfield (Etats-Unis) pour TCBY (6), Marie-Claude Dejeux (France) pour Tarte Julie (7), M. Klein (France) pour Baskin's Robbins/Dunkin'Donuts (8). Quand il n'était pas sur scène, notre animateur, William Moore, surveillait dans les coulisses les projections avec l'équipe technique (9).



# Européen de la restauration

« Rendez-vous pour CIR 2000 à Londres », ont annoncé les deux co-organisateurs de la convention, **Thierry Quinsat**, éditeur en chef de *Néo Restauration Magazine*, et **Philippe Hersant**, directeur du *Gira-Sic* (photo 10, à droite).



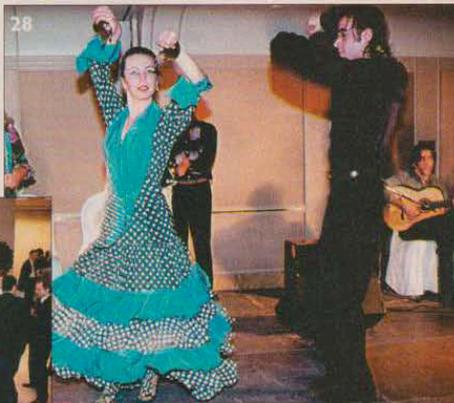
Photo 11: M. Smith (Etats-Unis) de Pizzeria Régina/Chi chi's; photo 12: M. De Valmigière (France) pour le Baeckeoffe d'Alsace; photo 13: M. Daravalis (Grèce) pour Goody's; photo 14: M. Baudaire (France) pour La Boucherie; photo 15: M. Malanga (Etats-Unis) pour El Torito; photos 16 et 17: MM. Nicolas et Dapremont pour Flo/Hippopotamus; photo 18: M. Delpy pour Croq 'O' Pain.



De nombreuses rencontres informelles ont eu lieu au cours des pauses (27) ou lors du cocktail dînatoire autour d'un groupe de flamenco (28). On reconnaît notamment, photo 25, de gauche à droite: M. Lucas (Aldis), M. Floquet (Prodirect) en compagnie de M. Bredeloux (Bonduelle). Photo 26: MM. Picart (Buffalo Grill), Durand-Daguin (Compass-Eurest) et Thiriez (Agapes).



Photo 19: Harold Ritchie lors de sa conférence de clôture; photo 20: Anne Dossche (France) pour Crocodile; photo 21: M. Wattiez (Italie) pour Segafredo Zanetti; photo 22: M. Domingo (Espagne) pour Pans & Company; photo 23: Mme Perez Valle (Espagne) pour Bocatta; photo 24: M. Cardona (France) pour Sistar.



### Monde. Friday's sous tous les cieux

La filiale restauration du groupe Carlson (hôtels et croisières Radisson, Carlson-Wagon Lit, etc.) accélère son expansion. Elle prévoit l'ouverture de 5 TGI Friday's Restaurant au Pakistan, de 12 Friday's American Bar en Grèce, Turquie, Pologne et Asie et de 20 Italianni's entre le Mexique et les Antilles. Friday's, qui compte actuellement 480 établissements, vise 935 unités d'ici à la fin de 2001, dont au moins 265 hors des Etats-Unis.

### USA. Togo's repris par Allied Domecq

Allied Domecq Retailing a acquis en juillet dernier la chaîne californienne de sandwichs Togo's Eatery (250 points de vente, dont 50% en franchise). Uniquement présente pour l'instant aux Etats-Unis et au Canada, l'enseigne Togo's pourrait donner lieu à des expériences de cobranding, sous un même toit, avec une autre enseigne du groupe (Baskin Robbins ou Dunkin' Donuts).

### Interdiction de fumer dans les bars

Depuis le 1<sup>er</sup> janvier, il est interdit de fumer dans tous les bars et les casinos de Californie... à l'exception de ceux situés dans les réserves indiennes. C'est le premier Etat à adopter une mesure aussi draconienne. En fait, depuis 1994, il est interdit de fumer dans la plupart des restaurants et sur les lieux de travail en Californie. C'est donc la fin de l'exception dont bénéficiaient jusqu'ici les bars et les casinos. Pour l'instant, les autorités tentent de persuader les patrons de bars et de casinos de respecter « spontanément » la loi et d'apposer des panneaux d'interdiction. Mais dans six mois, la rigueur de la loi s'appliquera : 100 dollars d'amende pour les contrevenants. Jusqu'à 7 000 dollars en cas de récidive.

### Planet Hollywood devient « cool »

Planet Hollywood lance Cool Planet Café, en collaboration avec Dreyer's Grand Ice Cream, partiellement contrôlée par Nestlé. Ces nouveaux lieux proposeront principalement des cafés, amuse-gueule (Finger foods), des viennoiseries et des crèmes glacées. Ces dernières vont être également lancées dans les restaurants du groupe (Planet Hollywood, Official All Star Cafes). Une dizaine de Cool Planet Cafes devraient ouvrir au premier semestre 1998 aux Etats-Unis.

### Vietnam. Colloque sur la gastronomie

Le sommet de la francophonie de Hanoi, en septembre dernier, a été l'occasion d'organiser un débat sur le patrimoine gastronomique du Vietnam, en collaboration avec l'ambassade de France, et avec la participation de la cellule « recherche ingénierie tourisme, hôtellerie, alimentation » de l'université Toulouse Le Mirail.

### G.-B. Le chef français Albert Roux sollicité

Albert Roux reste l'un des chefs les plus cotés outre-Manche. Il vient d'être sollicité pour donner un nouvel élan aux deux restaurants de l'hôtel Staley Hall à Northumberland. Sa société, Albert Roux Consulting, est également chargée d'organiser des événements gastronomiques dans cet établissement huppé bien connu des golfeurs.

### Danemark. Quatrième Lego Land en 2002

Le fabricant de jouets danois Lego va construire son quatrième parc d'attractions au sud de l'Allemagne ou à Tokyo en 2002, a annoncé la firme. Le choix définitif sera connu d'ici à dix-huit mois. Lego espère attirer 1,5 million de visiteurs par an dans ce nouveau parc de loisirs.

## Espagne

# L'irrésistible ascension de Telepizza

*Telepizza met les bouchées doubles. Devenue leader de la restauration rapide espagnole, la société, détenue en partie par le bouillonnant Leopoldo Fernandez Pujals, tente aujourd'hui une diversification.*



Le 11 novembre 1996, Leopoldo Fernandez Pujals se présente à la Bourse de Madrid avec une pizza et fait une offre surprenante aux brookers : prendre 47% du capital de sa compagnie Telepizza, leader de la livraison à domicile. L'opération plaît et le bouillonnant Cubain, qui a fait ses études aux Etats-Unis, trouve ainsi l'argent nécessaire pour poursuivre son irrésistible ascension. Et depuis, il s'impose comme le leader de la restauration rapide espagnole, devançant en 1997, avec un chiffre d'affaires de 1,5 MdF, McDonald's, les cafétérias El Corte Inglés et le groupe Sigla. Avec un parc de 287 magasins (148 en propre et 139 franchisés), il étend son empire non seulement dans les grandes villes espagnoles, mais également à l'étranger : au Portugal, au Mexique, au Chili et même en Pologne. La Bourse l'a jusqu'à présent suivi

**Telepizza compte désormais 287 magasins en Espagne.**

puisque la société, évaluée au départ à 24 700 millions de pesetas, représente aujourd'hui quelque 87 600 millions de pesetas.

### ► Rachat de Pizza World et diversification

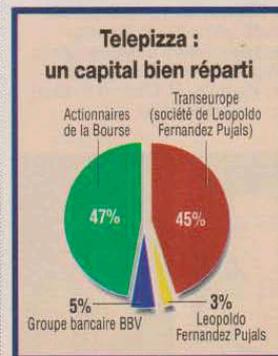
Entre-temps, Leopoldo Fernandez Pujals a renforcé sa position en rachetant le numéro deux de la pizza livrée, Pizza World (110

unités), prenant ainsi 61% du marché de la pizza à domicile et en amorçant une diversification. Celle-ci s'est concrétisée par l'achat de l'entreprise Precocinados Naturales, leader dans la fabrication d'empanadas, des galettes fourrées vendues en partie à travers les circuits de livraison à domicile. La seconde opération

de diversification est en cours. Elle vise à prendre le contrôle de « Carmen de la Comida de España », dont le capital appartient à d'importantes entreprises espagnoles, notamment aux chemins de fer espagnols. La transaction représente 450 millions de pesetas et porte sur sept établissements (4 à Madrid, 3 dans des métropoles de province), auxquels s'ajoute une franchise dans le nord de l'Espagne. Ceux-ci proposent une cuisine traditionnelle et un service à

table mais sont approvisionnés à partir d'une cuisine centrale par liaison froide. Une façon de ne pas mettre tous ses œufs dans le même panier et, en même temps, d'accroître la puissance de son groupe, laissant sur place ses concurrents directs, Pizza Hut ou Domino's Pizza. ■

Mario Canizal



# DOSSIER



► Si la place de numéro un, en Europe et en France, semble irrémédiablement acquise à McDonald's, la restauration commerciale n'en apparaît pas moins en pleine mutation.

► De nouveaux groupes émergent et affichent des ambitions claires au-delà de leurs frontières. Anglais, Allemands, Suisses se montrent particulièrement actifs. Les Français ne sont toutefois pas absents, même si peu encore atteignent une taille suffisante pour jouer un rôle de pivot dans les nécessaires et inévitables alliances.

► Paradoxe : malgré une crise de la consommation, dont la France n'est pas la seule à faire les frais, jamais les perspectives pour les chaînes n'ont semblé si ouvertes à l'échelle de l'Europe.

# EUROPE « LES

**B**ien que McDonald's continue d'occuper la première place en Europe (32 milliards de francs et plus de 2 500 unités), notre classement des « 100 » fait apparaître de nombreux changements. Accor, recentré sur l'hôtellerie, et dont une partie de la restauration est reprise par HRC (Holding de Restauration concédée), rétrograde à la dix-neuvième place, cédant la position de numéro deux à Lufthansa. Celle-ci double de taille grâce à une alliance avec le nord-américain Sky Chefs.

Le premier Français, Agapes Restauration, ne se classe qu'à la quatorzième place. Servair, Casino, HRC viennent toutefois immédiatement après. Cette configuration symbolise la perte de terrain des groupes de l'Hexagone face aux autres poids lourds européens. En 1991, parmi les quinze premiers du classement figuraient six Français. Cette année, ils sont néanmoins encore vingt-neuf dans notre « hit-parade », les Allemands et Britanniques étant ensuite les plus nombreux. Ces derniers affichent leur puissance nouvelle. Cinq Britanniques appartiennent, en effet, au club, encore restreint, des milliardaires en chiffre d'affaires (HT en francs).

## ► UN FORMIDABLE POTENTIEL

Ces évolutions et les événements de 1995, dont l'OPA de Granada contre Forte pour s'emparer de ses cinq cent unités d'autoroute en Angleterre et en France (Sogerba), montrent, en tout cas, que la restauration commerciale n'a pas épargnée par des mouvements c

## TOP 100 EN EUROPE 1995

### Attention

Dans le cadre de ce dossier annuel, les CA étaient donnés, jusqu'à présent, TTC SC (classement 1994 NRM n° 301- 3 mars 1995). Cette année, il s'agit pour la première fois, de CA HT SC: ceux de 1995 comme ceux de 1994

fond. Tout au contraire. Que ce soit d'un côté ou de l'autre de la Manche, en Allemagne, en Suisse, en Italie (où Mövenpick contrôle désormais le géant international Autogrill) ou bien en Espagne, les grandes manœuvres s'accroissent en dépit d'une conjoncture difficile qui a frappé cette année la plupart des pays européens. L'enjeu: le formidable potentiel qui s'offre presque partout en Europe aux groupes de restauration.

Michael Jones (notre correspondant anglais et expert du Gira) estime le taux de pénétration des chaînes en Europe à 20% en moyenne. Une proportion qui n'est pas uniformément répartie. Elle est plus élevée en Suisse (37%), au Royaume-Uni et en France (29%) ou en Allemagne (25%). Et elle n'atteint encore que 14% en Belgique et en Espagne; 6% en Italie et au Portugal; et 19% au Pays-Bas. Des chiffres qui dessinent, par contraste, et au-delà d'une conjoncture dans l'immédiat incertaine, un immense espace pour les groupes de restauration. ■



Welcome Break, l'un des fleurons autoroutiers de Forte, convoité par Granada.

## ROYAUME-UNI Les majors attaquent

L'événement de 1995 restera, ici, en Grande-Bretagne, l'attaque inattendue et brutale menée contre l'empire Forte, dont l'enjeu n'était pas seulement l'hôtellerie mais également la restauration. Forte avait jusqu'alors, avec ses 430 Little Chef Roadside et ses 26 Welcome Break Motorway, le leader incontesté sur les autoroutes anglaises ainsi que le deuxième opérateur du réseau autoroutier français avec Sogerba/Côté France (2 restaurants). C'est, on le sait, Granada qui devient maître de l'ensemble et,

- Autriche: A
- Belgique: B
- Bulgarie: Bg
- Suisse: CH
- Chypre: Cyp
- République tchèque: CZ
- Allemagne: D
- Danemark: DK
- Espagne: E
- France: F
- Grande-Bretagne: GB
- Grèce: Gr
- Hongrie: H
- Italie: I
- Irlande: Irl
- Islande: Isl
- Luxembourg: L
- Malte: Mt
- Norvège: N
- Pays-Bas: NL
- Portugal: P
- Pologne: PL
- Russie: R
- Suède: S
- Turquie: Tr

### LES 100 EN EUROPE

(hors restauration d'hôtels)

Rang 1995	Rang (1994)	Pays	GROUPE (Pays d'implantation)	ENSEIGNES ou TYPE D'ACTIVITE	CA HT 1995 (28860)	Nbre unités 1995 (2101)
1 <sup>er</sup>	(1)	USA	MCDONALD'S CORP*(1)	McDonald's	32300	2577
2 <sup>e</sup>	(5)	DE	LUFTHANSA Service GmbH D. F.	LSGAirline Catering, Partyservice, 30 Airport Gastronomie	6 100	(-)
3 <sup>e</sup>	(9)	CH	GATE GOURMET INT. (Swissair) CH, A. D. DK, E. F. GB, Gr. Ir. L. N. NL, P. S.	Restaurants d'aéroports, aérien, Relais de la Tour, musées, traiteurs.	3 948	85 (82)
4 <sup>e</sup>	(7)	GB	GRAND METROPOLITAN GB, CH, D, DK, E. F. H. Ir. I. N. NL, P. PL, S.	Burger King	3 900	726 (603)
5 <sup>e</sup>	(4)	GB	WHITBREAD GB, D.	282 Beefeater, 19 TGI Friday's, 350 Pizza Hut, 41 Costa Coffee, 36 Churrasco, 26 Maredo	3 757	754 (736)
6 <sup>e</sup>	(6)	BE	GIB Group B.F.L.	Quick	3 484	402 (334)
7 <sup>e</sup>	(8)	USA	PEPSICO B. Bg. CH, Cyp. CZ, D, DK, E. F. GB, Gr. H. Ir. I. N. NL, PL, Tr.	KFC, Pizza Hut, Taco Bell	3 100	(-) (747)
8 <sup>e</sup>	(15)	DE	AUTOBAHN TANK et RAST AG D.	Raststätten	2 924	212 (212)
9 <sup>e</sup>	(3)	IT	AUTOGRILL/SPA I.E.F.	Allemagne, Amico, Arabesque, Autogrill, Burghy, Cia Motta, Down Town, Duomo Center, La Pergola, La Terraza, Magic, Proccae, Quatre Pentes, Resmar, Spizzico	2 735	192 (176)
10 <sup>e</sup>	(10)	GB	FORTE (2) * G.B. E. F.	430 Little Chef/Happy Eater, 26 Welcome Break, 42 Côté France, 27 divers, catering aérien	2 585	522 (603)
11 <sup>e</sup>	(12)	DE	MITROPA AG D.	Mitropa, Verkebrs, ferroviaire, autoroutes	2 530	305 (303)
12 <sup>e</sup>	(13)	CH	MIGROS Gastronomie CH	Gourmessa, Glatzentrum, Restaurants Migros, Migrolino, Mi Gusto	2 516	203 (203)
13 <sup>e</sup>	(11)	CH	MÖVENPICK (3) CH, A. D. GB.	Autobahn Restaurants, Cindy, Caveau/Weinpubs, Marché Restaurants, restaurants Mövenpick, Palavrion, Silberkugel	2 444	(-) (110)
14 <sup>e</sup>	(14)	FR	AGAPES RESTAURATION F.E.I.	Amarine, Flunch, Pic Pain, Pizza Paï	2 290	163 (160)
15 <sup>e</sup>	(18)	FR	SERVAIR FE	Aérien, ferroviaire	2 138	(-) (1 905)
16 <sup>e</sup>	(16)	FR	CASINO RESTAURATION F.	Casino Cafétéria	2 018	222 (208)
17 <sup>e</sup>	(-)	FR	HRC FRANCE (4) F.	Actair, Arche, Café route, restaurants musées et sites de tradition (ex Accor), Philéas, aérien.	1 982	365 (-) (-)
18 <sup>e</sup>	(17)	GB	COMPASS Travellers Fare/SSP GB, DK, E. F. Ir. N. S.	442 divers, 73 Upper Crust, 41 Café Select, 14 Le Croissant Shop, 12 Franks Deli, 5 Coopers, 9 Gingham, franchises	1 826	646 (1 582) (612)

(1) Tous pays sauf Albanie.  
 (2) Forte vient d'être repris par Granada  
 (3) Mövenpick se sépare de Cindy et des cafés Silberkugel  
 (4) Holding de Restauration concédée qui a repris une grande partie de la restauration d'Accor

Source: Néo Restauration Magazine

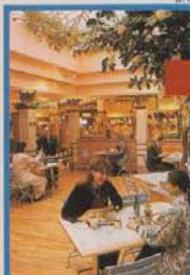
## DOSSIER LA RESTAURATION COMMERCIALE EN EUROPE

### LES 100 EN EUROPE

(hors restauration d'hôtels)

Rang 1995	Rang (1994) d'origine	Pays	GROUPE (Pays d'implantation)	ENSEIGNES ou TYPE D'ACTIVITÉ	CA HT 1995	Nbre unités 1995
19	(2)	BE	ACCOR F.A.B.D.E.GB.L.NL.P.	Courte Paille, LeNôtre/Rosell, ferroviaire (WL) et buffets de gare	1 599 (-)	139 (-)
20	(20)	DE	WIGAST AG A.D.	Winerwald	1 469 (1 391)	215 (203)
21	(22)	DE	KAUFHOF GASTRONOMIE SERVICE GmbH D.	Kaufhof Gastronomie, Kaufhalle Gastronomie, Hofgarten, Grillpfanne	1 293 (1 024)	283 (233)
22	(19)	DE	NORDSEE GmbH D.A.NL.	Nordsee Restaurants, Snacks, Meresbuffet La Mer	1 242 (1 224)	335 (333)
23	(35)	GB	BASS GB.	138 Toby Restaurants, 78 Harvester, 40 Fork and Pitcher, 2 T.J'S, 3 Jeffersons	1 169 (510)	261 (136)
24	(25)	BE	BUFFALO GRILL SA F.E.	Buffalo Grill	1 148 (917)	131 (114)
25	(23)	BE	GROUPE FLO SA F.D.E.GB.	21 Brasseries et Cafés Flo, 17 Hippopotamus, Flo Prestige-Raynier Marchetti (hors boutiques), activités gérées	1 074 (987)	55 (51)
26	(21)	IT	CREMONINI RESTAURATION I.	Burghy, Casina Della Rose, Italy & Italy, La Piazza, Chef Express	1 027 (969)	86 (82)
27	(45)	BE	LE DUFF RESTAURATION F.E.GB.I.NL.	150 Brioches dorées, 17 Le Fourmil de Pierre, 12 Boulangerie Traiteur Bridor (total: 536 MF); 69 Pizza del Arte et Bosuf Jardinier, 5 Lucio (total: 444 MF)	980 (-)	250 (181)
28	(27)	GB	CITY CENTRE GB.	43 Garfunkels, 105 Deep Pan Pizza, 10 Caffè Uno, 17 Chiquitos, 7 OK Diners, 5 Filling Station, 7 Nachos Restaurant and Bar, 4 Frankie & Benny Italian Diner, 7 divers	965 (723)	205 (168)
29	(26)	DE	KARSTADT AG D.	Karstadt Gastronomie	883 (894)	138 (137)
30	(28)	SE	IKEA AG S.A.B.CH.D.DK.F.GB.H.I.NL.N.PI.	Ikea	835 (822)	80 (75)
31	(-)	ES	CAFETERIAS EL CORTE INGLES E.	Cafeterias El Corte	801 (-)	(-)
32	(39)	BE	ELITAIR (5) F.E.	Drouant, Jules Verne, Maxim's, Territoria, Greenwich, Aubepain, Pomme de Pain	800 (-)	117 (-)
33	(24)	CH	SSG SWISS DINING CAR COMPANY CH.	Ferroviaire, restauroutes, restauration traditionnelle	725 (603)	179 (149)
34	(-)	GB	ALLIED DOMECO LEISURE GB.	320 Big Steak, 22 Exchanges, 30 Porterhouse, 33 Dunkin's Donuts Baskin Robbins, John Bull Pub	722 (-)	405 (-)
35	(30)	GB	BRIGHTREASONS GB.	105 Pizzaland, 57 Bella Pasta, 18 Pizza Piazza, 5 divers	695 (589)	185 (179)
36	(37)	ES	TELEPIZZA E.B.Gr.P.Pol.	Telepizza	641 (498)	(-)
37	(31)	ES	SIGLA E.	Bob's, Vip's	638 (621)	55 (54)
38	(29)	CH	COOP Restaurants SCHEIZ CH.	SB Restaurants, Speisewagen	604 (586)	123 (121)
39	(33)	GR	GOODY'S SA Gr.	Goody's, Flocafe	562 (436)	96 (83)

(5) Ellitair regroupe Eliance at Brattonnière SA



Ces restaurants allemands sont gérés par les grands magasins Kaufhof.



Clifden Pub à Orly : un nouveau concept testé par Ellitair en aéroport.

au final, l'OPA se solde seulement, pour les restaurants anglais et français, par un changement de propriétaire, mais sans bouleversement majeur de stratégie.

Les modifications ont bien failli être plus importantes. Sir Rocco Forte avait, en effet, promis à Whitbread, numéro un de la restauration anglaise (CA HT : 3,7 milliards de francs) de lui céder Little Chef et Welcome Break au cas où l'OPA échouerait.

Malgré ce dépit – l'opération lui aurait permis de réaliser un bond considérable en détenant environ 1 300 restaurants –, Whitbread a des raisons d'être optimiste. Sa puissance lui donne tout le loisir d'absorber, sans coup férir, une prochaine proie. Il vient de démontrer son appétit en élargissant son activité à l'hôtellerie à l'occasion du rachat de la branche anglaise de la chaîne Marriott et vise, comme d'autres opérateurs, les plus beaux fleurons de quelque 50 000 pubs du Royaume-Uni, qu'il pourrait transformer en restaurants-pubs et intégrer à une de ses enseignes.

#### ► LES 50 000 PUBS VISÉS

Une stratégie que Bass poursuit parallèlement avec Toby ou Haverster.

Ils ne sont pas les seuls. Allied Domecq Leisure (plus de 700 millions de francs de CA) est ainsi en train de développer de la même manière et à grande échelle l'enseigne Big Steak (déjà 320 unités), tandis que Scottish and Newcastle prospère également à grande vitesse, gérant désormais cent-vingt unités.

Parmi les chaînes vedettes ou en passe de le devenir en Grande-Bretagne et pourquoi pas en Europe, citons City Centre Restaurants (Garfunkels, Deep Pan Pizza, Chiquitos), qui lance une série impressionnante de nouvelles enseignes (OK Diners, Nachos, Frankie & Benny, Caffè Uno). City Centre devrait ouvrir trente restaurants en 1996.

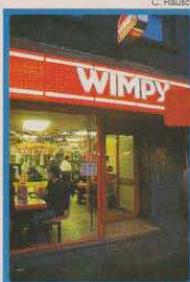
Deux groupes à guetter également Kenny Rogers, chaîne de poulets qui se développe avec succès aux Etats-Unis et annonce son arrivée en Grande-Bretagne en prévoyant d'implanter très rapidement cinquante unités en franchise ; et Chili's Grill and Bar, autre américain qui vient de planter son premier restaurant pilote dans le centre de Londres.

A surveiller, enfin, deux majors du Royaume-Uni, Grand Metropolitan et Compass. Les rumeurs laissent entendre que Grand Metropolitan (72

Burger King en Europe) serait à vendre... si un bon acheteur se présentait. Quant à Compass, déjà l'un des puissants du secteur de la restauration collective, il ne déguise pas ses ambitions en restauration commerciale à travers toute l'Europe. Possédant plus de six cents restaurants (dont des franchises Burger King et Pizza Hut) et des positions fortes dans la restauration des aéroports, il pourrait bien, lui aussi, se révéler en 1996 très actif.

A l'évidence, dans la conquête européenne, les groupes britanniques se révèlent être de redoutables concurrents. ■

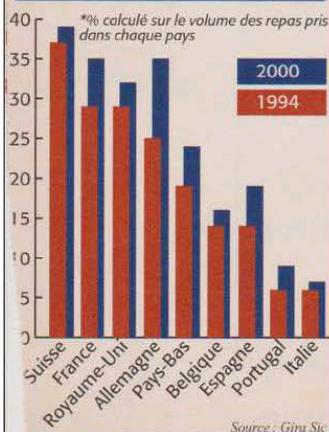
## ALLEMAGNE Boom sur les autoroutes



Wimpy : une extension limitée à la Grande-Bretagne.

Avec 4 millions de chômeurs, une consommation obérée par le poids des prélèvements obligatoires, la restauration allemande pâtit de la dégradation économique outre-Rhin. « L'année 1995 a été très difficile », confirme Hagen Jankowski, directeur du secteur Gastronomie des grands magasins **Karstadt**. La chaîne a dû mettre en avant de nouvelles formules : « Menu super économique », « à volonté », « à prix de fête », ou encore des tarifs « heures creuses ».

## Une pénétration des chaînes encore faible et un potentiel important jusqu'à l'an 2000\*



LES 100 EN EUROPE (hors restauration d'hôtels)						CA HT	Nbre
Rang 1995	Rang (1994)	Pays d'origine	GROUPE (Pays d'implantation)	ENSEIGNES ou TYPE D'ACTIVITÉ	SC MF	1995	unités 1995
					(1994)		(1994)
40 <sup>e</sup>	(38)	USA	DOMINO'S PIZZA GB, B, D, DK, E, F, Ir, L, PL	Domino's Pizza, Zap! Pizza	545	(-)	(201)
41 <sup>e</sup>	(-)	GB	SCOTTISH & NEWCASTLE GB	70 Country Cavery, 32 Home Spread, 18 Old Orleans	540	(-)	(-)
42 <sup>e</sup>	(34)	F	BISTRO ROMAIN F	Bistro de Paris, Bistro Romain	524	43	(41)
43 <sup>e</sup>	(32)	D	LE BUFFET SYSTEM GASTRONOMIE D	Hertie Gastronomie	523	80	(83)
44 <sup>e</sup>	(-)	GB	WIMPY International GB	Wimpy	513	265	(-)
45 <sup>e</sup>	(40)	D	STEIGENBERGER Restaurants D, A, E, NL, S	Restaurants Steigenberger	466	111	(111)
46 <sup>e</sup>	(47)	D	KUFFLER Groupe D, A	Kuffler	465	30	(30)
47 <sup>e</sup>	(40)	D	RESTAURATIONS BETRIEBE STOCKHEIM GmbH D	Stocheim Gastronomie	455	22	(22)
48 <sup>e</sup>	(41)	D	KOCHLÖFFEL GmbH D	Kochlöffel	441	125	(125)
49 <sup>e</sup>	(42)	D	BLOCK HOUSE Group D	Block House, Elysée Gastronomie, Jim Beef	438	32	(32)
50 <sup>e</sup>	(44)	D	GRILLMASTER D	Grillmaster Restaurants	436	161	(160)
51 <sup>e</sup>	(51)	NL, B, D	AC HOLDING NV NL, B, D	Ac Restaurants	415	36	(33)
52 <sup>e</sup>	(43)	CH	MAUS Frères/MANORA CH	Cafétérias Manora (Fleur, Crocodile)	376	33	(33)
53 <sup>e</sup>	(48)	F, E	DOCKS DE France RESTAURATION F, E	39 Cafétérias Miami, 7 Rondo, divers	370	47	(49)
54 <sup>e</sup>	(50)	F	ERIS RESTAURATION/PHENIX F	Cafétérias Eris, Quick	363	55	(55)
55 <sup>e</sup>	(59)	GB	PIZZA EXPRESS GB	Pizza Express	350	105	(78)
56 <sup>e</sup>	(56)	GB, B, D, E, F, Ir, P	MY KINDA TOWN PLC GB, B, D, E, F, Ir, P	Chigago Pizza Pie, Chigaco Meatpackers, Chigago Ribshack, Criterion, Henry J. Bean's, Salsa, Tacos	342	35	(31)
57 <sup>e</sup>	(49)	F	GROUPE GERARD JOULIE F	21 Batifol (190 MF), 6 brasseries (150 MF)	340	27	(25)
58 <sup>e</sup>	(55)	F	PJB HOLDING F	Pied de Cochon, Grand Café, L'Alsace, Chariot, Procope, L'Arbuc, La Fermette Marbœuf (total : 243 MF), 5 Clément (71 MF)	314	12	(9)
59 <sup>e</sup>	(74)	E	ALDA FOOD FRANKFURT SA E	Pokin's, Bocatta	309	67	(52)
60 <sup>e</sup>	(57)	F	FRANTOUR RESTAURATION F	6 Alizé, Gare de Lyon, Galaxie, Embarcadère, Impériale, 14 Croq'Voyages, 8 Pains à la Ligne	290	59	(54)
61 <sup>e</sup>	(58)	E	CENTROS DE NEO-RESTAURACION SA, GOFY RESTAURANTE E	Gofy	261	44	(41)
62 <sup>e</sup>	(68)	B, F	CHEZ LEON Diffusion Restauration B, F	Léon de Bruxelles	257	19	(16)

## DOSSIER LA RESTAURATION COMMERCIALE EN EUROPE

En Allemagne, où la restauration traditionnelle est détenue à 25% par des étrangers, Karstadt comme **Nordsee** doivent en outre s'adapter à la mode « exotique ». C'est ainsi que Karstadt a inauguré ses nouveaux **Ambiente**, des mini-free flow à l'italienne et des comptoirs de restauration **Asia Point** dans ses rayons alimentaires.

Entre une fiscalité handicapante et une législation très lourde (la restauration est soumise en Allemagne à plus de 200 lois différentes), tous les responsables de la restauration allemande sont, en tout cas, contraints à se battre farouchement. Ceux de Karstadt ne perdent pas leur optimisme et tablent sur une croissance raisonnable de 2% en 1996.

### ► RESTAURATION DU VOYAGE EN HAUSSE

Comme un défi à la conjoncture maussade, la restauration autoroutière, ferroviaire ou aérienne marche très fort en Allemagne. Ainsi, la privatisation de la restauration autoroutière permet aux grands (**Wienerwald, McDonald's, Mövenpick, Steigenberger...**) de se déployer sur ce nouveau créneau. Exemple de ce dynamisme: **Tank & Rast** fait son entrée en Bourse cette année et met en place en même temps un accord avec une société de grande distribution, pour approvisionner ses 330 restaurants et ses 48 kiosques. **Mitropa**, société de l'ex-Allemagne de l'Est qui tient déjà 26 restaurants en Allemagne orientale, entreprend également sa conquête de l'Ouest très active.

**Dinea Gastronomie GmbH** (Cologne), filiale gastronomie de la chaîne de grands magasins Kaufhof, vient également d'ouvrir deux sites sur autoroute en coopération avec McDonald's.

C'est le même « boom » dans la restauration aérienne avec, en particulier, une alliance de choc, conclue en septembre dernier entre **LSG** (Lufthansa) et le canadien **Sky Chefs**. Celle-ci permet à la compagnie allemande de prendre possession de son concurrent direct **aterair** et de doubler son chiffre d'affaires (4,1 milliards de deutschemarks). Les trois entreprises réunies détiennent désormais 33% du marché mondial du catering aérien. Cette alliance va peser non seulement sur le marché du catering mais sur l'ensemble du marché européen. ■



Tartes Julie : sans véritable rival sur ce créneau.



Alfonso's Mexican : le tex-mex à la sauce hollandaise.

LES 100 EN EUROPE (hors restauration d'hôtels)				CA HT	Nbre	
Rang 1995	Rang (1994)	Pays d'origine	GROUPE (Pays d'implantation)	ENSEIGNES ou TYPE D'ACTIVITÉ	SC MF 1995	unités 1995
63 <sup>e</sup>	(63)	FR	CRC F.	Mélodine, Tarte Julie, divers	256 (224)	45 (38)
64 <sup>e</sup>	(65)	FR	GROUPE PINO F.	Pizzas Pino, Entrecôte	251 (-)	9 (9)
65 <sup>e</sup>	(52)	CH	MERKUR AG CH. F.	Merkur Restaurants, snacks, Bonne Journée	250 (244)	68 (68)
65 <sup>e</sup>		DE	LTC CATERING D.	Aérien	250 (124)	(-)
67 <sup>e</sup>	(94)	ES	PANSFOOD SA E.	Pans & Compagny	248 (124)	70 (35)
68 <sup>e</sup>	(76)	DE	GLOBUS SB-WARENHAUS GmbH et Co KG D.	Handelgastronomie	244 (224)	42 (39)
69 <sup>e</sup>	(61)	DE	VINZENMURR GmbH D.	VM-Imbisse	235 (232)	109 (105)
70 <sup>e</sup>	(62)	BE	CARESTEL SA B.	Restaurants d'autoroute, restaurants d'aéroport	233 (226)	65 (65)
71 <sup>e</sup>	(66)	DE	FEINKOST KÄFER GmbH D.	Traiteur, Käfer Partyservice, Käfer Gastronomie	226 (220)	4 (4)
72 <sup>e</sup>	(71)	DE	HANS PETER STROHECKER GmbH D. F. I.	Alter Simpel, Alte Zunft, Bierbörse, Humpen, Jim Knopp, Schwargbrenner, Schwendi, Tränke	224 (202)	92 (80)
73 <sup>e</sup>	(75)	IT	CAMST SCRL I. B.	Bass' 8, C'Entro, Centro Borgo, Corner's, Europa, Vertice, Fiebaro, Fiorani, Nana Terminal	215 (201)	75 (75)
74 <sup>e</sup>	(80)	FR	RELAIS H F.	Cafétérias Relais H	210 (182)	131 (117)
75 <sup>e</sup>	(79)	FR	LA CROISSANTERIE SA F. E. Gr. It. I. P.	La Croissanterie	206 (194)	120 (119)
76 <sup>e</sup>	(60)	CH	BINDELLA CH.	Contrapunto, Cantinetta, Santa Lucia, Spaghetti Factory	203 (198)	30 (30)
77 <sup>e</sup>	(82)	ES	Groupe MIXOR E. D. P.	Pizza World	199 (160)	110 (-)
77 <sup>e</sup>	(72)	NL	GIOMA Restaurants NL. B. CH. GB.	Alfonso's Mexican, Gauchos Grill, Calzone Pizza, Churrasco Grill, Down Mexico Way, Grand Café Riche, Tony's Pasta, Pizza Compagny	199 (199)	42 (42)
79 <sup>e</sup>	(70)	DE	CASSEROLE FEINE FEICKOST FILIALGESSELLSCHAFT GmbH D.	Casserole Metzgerei, Beibverkauf, Von Eicken	194 (192)	68 (68)
79 <sup>e</sup>	(-)	FR	HPS SA F. D. B.	Point Chaud	194 (173)	98 (87)
81 <sup>e</sup>	(69)	DE	HABERL GASTRONOMIE GmbH D.	Biergarten, Gastronomie Olympia-Gelände, catering international.	193 (191)	12 (12)
82 <sup>e</sup>	(77)	DE	ACCENTE GASTRONOMIE VERWALTUNGS GmbH D.	Eriesenhof/Come in Messegastronomie	186 (184)	44 (44)
83 <sup>e</sup>	(73)	FR	CHANTEGRILL F.	Chantegrill	177 (184)	38 (41)
84 <sup>e</sup>	(84)	DE	WERTKAUF D.	Wertkauf Gastronomie	173 (162)	16 (15)
85 <sup>e</sup>	(87)	DE	METRO INTERNATIONAL D.	Metro, Huma, Meister Gastronomie	170 (168)	52 (52)
85 <sup>e</sup>	(81)	FR	GROUPEMENT UNM F.	Restauramarché, Bistro du Marché	170 (160)	53 (53)

## DOSSIER LA RESTAURATION COMMERCIALE EN EUROPE

### SUISSE L'essoufflement

Les restaurateurs suisses ont également, dans leur ensemble, essayé une année difficile. Ils ont dû subir à la fois l'introduction de la TVA et une forte revalorisation de leur monnaie. Au premier trimestre 1995, le recul du CA de l'hôtellerie et de la restauration helvétiques a atteint plus de 10%. Une situation qui incite à la prudence. « Plus que jamais, il faut savoir identifier les bons sites », explique Hans-Peter Staub, de **Merkur Management**. Le groupe bernois n'a ainsi ouvert qu'un seul restaurant l'an dernier (67) mais implanté cinq snacks dans les gares.

#### ► MÖVENPICK EXPORTE

Le leader **Mövenpick**, qui ne pourra réaliser tout à fait son bénéfice de 1994, (13,7 millions de francs) fait preuve de la même circonspection. Il s'est séparé de ses unités de restauration rapide **Cindy** et des **Cafés Silberkugel**, parce que ceux-ci exigeaient trop d'investissements. Le géant a également entrepris une restructuration pour être plus efficace: fusionnement, l'été dernier, des filiales suisses du secteur gastronomie et regroupement, à l'automne, des restaurants suisses et allemands encore autonomes, au sein d'une nouvelle division baptisée **Mövenpick Restaurants International**. Sur son deuxième marché principal, l'Allemagne, la chaîne suisse fait également un effort d'innovation en implantant ses nouvelles créations: **Palavrion**, (restauration traditionnelle) et **Cliccadou** (restauration rapide).

**Mövenpick** exporte, en outre, ses restaurants **Marché** sur les autoroutes allemandes et à Toronto, entre autres. Ce concept va s'implanter cette année dans le parc de loisirs Legoland, près de Londres, et sur des autoroutes israéliennes. En attendant, **Mövenpick** - qui contrôle l'italien **Autogrill** - reste discret sur les synergies qui pourraient se développer avec son puissant allié. Pour l'instant, on assiste à un partage du développement international, la chaîne italienne semblant s'occuper des marchés autoroutiers espagnols et français. Elle détient aujourd'hui 30% de la restauration des autoroutes espagnoles. ■



Au Bureau: le succès d'un nouveau type de pub-restaurant.

### LES 100 EN EUROPE (hors restauration d'hôtels)

Rang 1995	Rang (1994)	Pays d'origine	GROUPE (Pays d'implantation)	ENSEIGNES ou TYPE D'ACTIVITÉ	CA HT 1995 (1994)	Nbre unités 1995 (1994)
87 <sup>e</sup>	(92)	IT	BREK RISTORANTI SPA	Brek Ristorente	167 (142)	13 (11)
88 <sup>e</sup>	(97)	IT	SUPERMAC'S LTD	Supermac's	165 (137)	24 (21)
89 <sup>e</sup>	(95)	FR	FRANCE RESTAURATION RAPIDE	Packman, Pat' à Pain	160 (131)	7 (7)
90 <sup>e</sup>		FR	HOLDING DE DECKER	Au Bureau	155 (-)	33 (22)
91 <sup>e</sup>	(90)	FR	FUTUROSCOPE RESTAURATION	Restauration du parc	150 (139)	29 (25)
91 <sup>e</sup>		ES	CAFETERIAS JOSE LUIS	Caféterias Jose Luis	150 (138)	(-)
93 <sup>e</sup>		FR	SOGECER SA	Arcotel	148 (133)	24 (21)
94 <sup>e</sup>		ES	FOSTER'S HOLLYWOOD	Foster's Hollywood	145 (111)	56 (-)
95 <sup>e</sup>	(83)	CH	FLUGHAFEN Restaurants	Restaurants de l'aéroport de Zurich	141 (138)	22 (22)
95 <sup>e</sup>	(91)	DE	LE CROISSANT KNOOP TROUILLER GmbH	Le Cro Bag	141 (135)	50 (50)
97 <sup>e</sup>	(88)	FR	GROUPE BRITTANY FERRIES SERESTEL	Maritime	140 (145)	(-)
98 <sup>e</sup>	(64)	CH	CASTRAG AG	Italiener, Mister Wong, Mr Pickwick, Murphy's	138 (134)	20 (19)
99 <sup>e</sup>	(89)	FR	MONOPRIX	Caféterias Monoprix	116 (133)	15 (18)
100 <sup>e</sup>	(98)	FR	HORETO	Diverses concessions, traiteur	115 (114)	(-)

### ITALIE Les bonheurs de la reprise

La restauration italienne a bénéficié d'une bonne année et de la nette amélioration du climat économique permise par la dévaluation de la lire. Toutefois, cette accélération de la croissance (la plus élevée d'Europe) ne s'est traduite par une fréquentation accrue des restaurants que dans la deuxième moitié de l'année.

Sur un marché encore très dispersé, avec de fortes traditions (la fréquentation familiale des restaurants de quartier,

notamment) et le succès persistant des 19 500 pizzerias et bars de la Péninsule, les principales chaînes ont ainsi continué à grignoter le marché. **McDonald's** a pu réussir ainsi son décollage grâce à un partenariat avec l'investisseur Mario Rosca. **Autogrill** reste cependant omniprésent: et le premier groupe dans la péninsule a enregistré une année 1995 très satisfaisante.

D'autres restaurateurs ont également vu leur chiffre d'affaires progresser sensiblement. Celui de **Brek Restorenti** est passé de 41 à près de 49 millions de lires (158 millions de francs). Grâce à des investissements, Brek a profité de l'embellie pour ouvrir trois nouvelles unités en 1995, toutes excellentement situées dans des centres importants (Milan, Turin et Trévise) et porté de 11 à 13 le nombre total de ses établissements. La chaîne a également investi en 1995 pour

## DOSSIER LA RESTAURATION COMMERCIALE EN EUROPE

Dossier réalisé par Patrice Fleurent avec Michael Jones (Royaume-Uni), Marie Lugisland (Allemagne), Mario Canizal (Espagne) et Giovanni Loggi (Italie)

«relooker» ses unités afin de toucher une clientèle de plus haut niveau. Elle a enfin décidé d'accentuer sa différence par rapport à des enseignes concurrentes, en mettant en avant des produits naturels. Les plats proposés, moins riches, plus biologiques, plus frais, font référence à la meilleure tradition de la gastronomie méditerranéenne.

Outre la croissance de ses fast-foods **Burghy**, le groupe **Cremonini** estime, lui aussi, avoir réalisé en 1995 une «bonne année», notamment dans le secteur de la restauration ferroviaire. Ses buffets de gare, regroupés au sein de la filiale **Agapes**, ont réalisé un chiffre d'affaires de 40 milliards de liras (130 millions de francs), contre 43 milliards de liras en 1994 en servant 40 millions de clients. Le nombre de buffets est resté toutefois inchangé (Rome-Termini, Mestre, Florence, Gênes, Pise, Ferrare, etc.).

Pour 1996, le groupe espère une nouvelle forte croissance, grâce, notamment, à la montée en puissance progressive des trains rapides en Italie. Bref, en Italie, il n'y a pas qu'Autogrill pour se montrer confiant dans l'avenir. ■

### ESPAGNE Terre des convoitises

L'Europe du Sud paraît décidément favorisée. Les restaurateurs espagnols n'ont pas eu à se plaindre de l'année 1995 et les perspectives s'annoncent plutôt bonnes. L'Espagne est d'ailleurs devenu un pays phare pour un nombre croissant de

chaînes étrangères. Pas seulement sur le créneau de la restauration rapide. Partout la compétition est serrée. Seul ombre au tableau : l'approbation d'une loi qui restreint sérieusement l'installation de nouveaux centres commerciaux et limite leur ouverture les dimanches et jours fériés. Malgré cette épine, les majors ont poursuivi leur offensive. **McDonald's** en tête, qui a fêté sa centième unité. Les chaînes espagnoles ont suivi. **Huevo** est désormais présente dans treize centres commerciaux. **Genesa-Gofy** a préféré innover en redessinant ses **Nostrus** (des self-services) et ses **Tio Tapas** (bars à tapas).

#### ► DES NATIONAUX QUI RÉSISTENT

La lutte est rude également entre les leaders de la restauration livrée, également en plein essor. Dans le peloton de tête, **Domino's Pizza** semble remporter les meilleures positions, tandis que ses challengers **Telepizza** et **Pizza World** ne semblent pas pouvoir rentabiliser leurs activités. Telepizza cherche un partenaire financier. Ce serait aussi le cas de **Pizza World**. En Espagne, comme ailleurs, surgissent à longueur d'année de nouveaux candidats à la restauration livrée. Quelques-uns survivent et les produits se multiplient : empanadas (galettes garnies), paellas, pot-au-feu, plats chinois...

Sur le front de la restauration à thème, très actif, la liste des enseignes internationales arrivées en Espagne s'est complétée. L'offensive américaine se fait plus pressante. A côté de **Hard Rock Cafe**, **Big Boy** et **TGI Friday's**, **Planet Hollywood** est venu planter son drapeau à Barcelone. Et la ville attend l'ouverture d'un **Dive** dans le centre commercial de MareMagnum, une nouveauté signée... Steven Spielberg. Cela n'empêche pas, là encore, un groupe 100%

espagnol, **Forster's Hollywood**, de damer le pion aux restaurants américains sur leur propre terrain en alignant trente restaurants Forster's.

D'une manière générale, la clientèle espagnole continue de plébisciter les restaurants qui combinent prix, temps de service correct et qualité. A cet égard, quelques groupes de restauration barcelonnais comme **Nolla** (enseignes Tapa-Tapa, Qu-Qu, Mussol), **Cacheiro** (La Gran Tasca, Babareeba, La Tramoia), **Quality Tapas Bar** (Tapas Bar) tiennent bon face à la concurrence des nouvelles chaînes internationales.

A Madrid, signalons une autre tentative intéressante avec **Carmen la Comida de España**, qui a ouvert deux établissements et prévoit d'en ouvrir quatre autres en 1996. Le concept : des mets très traditionnels et naturels avec l'emploi en cuisine de technologies de production de «masse» très pointues afin de compenser le coût matière. Dans le même esprit, les enseignes «nationales» de **bocadillas** (sandwiches) se défendent bien. Elles parviennent à freiner l'irruption des hamburgers et du poulet rôti. **Pans et Company** (à 100% espagnol) et **Bocatta** sont ainsi les plus sérieux candidats au leadership sur ce créneau sandwicheries où apparaît aussi la chaîne madrilène **Rodilla**.

Mouvement enfin dans le catering aérien, la restauration ferroviaire et des gares. Les deux entreprises publiques **Aena** (aéroports) et **Rente** (rail) ont permis l'entrée sur ces marchés de **Wagons-Lits** et **Rail Gourmet**.

L'Espagne (comme l'Italie) témoigne donc que l'Europe demeure encore, et dépit des années de crise et de morosité qui se succèdent, un marché varié et riche de potentiel dans de nombreux créneaux de la restauration. ■

### Ça s'est passé en 1995

#### ► TRANSACTIONS

**Domino's** (Franca Americana) rachète Zap! Pizza et reprend 13 unités. **Raynier & Marchetti** rejoint le groupe Flo. **Melodine** (CRC) s'adjuge Winch et double son parc en passant de 10 à 18 cafétérias. **HRC** (Charterhouse SA) hérite d'une partie de

l'activité restauration d'Accor.

#### ► COUPS DE POKER

**Le Duff** joue et gagne Pizza del Arte et Bœuf Jardinier (ex-Accor). Surenchère de **Granada**. L'enjeu : les 500 restaurants d'autoroute de Forte.

#### ► NOUVEAUX LIEUX

**Guy Savoy** investit le

Cap Vernet et ajoute une huitième unité à son mini-groupe.

#### La Cité de L'Europe

ouvre ses portes près de Coquelles, à proximité immédiate du tunnel Transmanche, avec une surface de 10 000 m<sup>2</sup> de restauration.

#### Planet Hollywood

débarque avec un restaurant de 600

places à Paris.

**Silver Factory**, signé Jean-Michel Wilmotte, aligne 1 300 m<sup>2</sup> avenue Georges-V **Gilbert Coste** investit La Villette avec son Café de la Musique dans la cité du même nom.

#### ► INNOVATIONS

**Philéas** (HRC) :

nouveau point de vente sandwicherie-viennoise-rie à Orly Sud. **McDonald's** entre en gare (à Lille-Flandres) Des cafés-restaurants surfent sur **Internet**. **Sogerba** (ex-Forte) imprime sa marque : **Côté France**. **Eliance** ouvre Clifden Pub à Orly Sud. **Christian Picart** dévoile Pizza Pub.

#### ► ANNIVERSAIRE

Le groupe **Docks de France** (48 cafétérias) fête ses 100 ans

#### ► COUP DE GUEULE

La profession descend dans la rue le 23 octobre pour protester contre hausse de la TVA.

Source : *Néo Restauration Magazine*

# 1998-2008

10 years of content & community on a multi-national plane.

- Markets, brands, trends, inspiration & innovation.
- **1998:** a new trade magazine is born. The first issue of FoodService Europe.
- **2000:** First European Foodservice Summit in Zurich (in cooperation with the Gottlieb Duttweiler Institute, Switzerland, and the University of Central Florida, USA).
- **2004:** geographic expansion – FoodService Europe becomes FoodService Europe & Middle East.
- **2008:** 10th anniversary of FoodService Europe & Middle East.

# 10

### Anniversary issue 3/2008:

What makes FoodService Europe & Middle East so unique.  
What readers particularly like about our trade magazine.  
What the expertise of this 'voice of the industry' is based on.  
What makes this publication so important for the export of ideas, products and concepts.



We want to celebrate this anniversary – join us!

[www.foodserviceeurope.com](http://www.foodserviceeurope.com) · [www.cafe-future.net](http://www.cafe-future.net)  
[www.dfv.de](http://www.dfv.de)



FRONTLINE

# Committed to Content & Community



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This issue marks the end of the first decade for FoodService Europe & Middle East – a time of mixed feelings, of a little pride and much thankfulness, for us as originators of the idea. Pride because we literally succeeded in sending our offspring out into the world, and because an innovative and undoubtedly bold venture has been well received by a discerning international readership. When the pilot issue of this trade magazine was published in October 1998, it was by no means backed by the usual marketing methods. Intuition and a feeling for the right time, not to mention the allimportant pioneering spirit, were the crucial factors. Nothing else. However, that's not quite true. We had the expertise gained from many years of experience with our German trade magazine, food-service, an authoritative publication firmly anchored in the domestic market and one of over 90 journals focusing primarily on food and fashion published by the Frankfurt-based Deutscher Fachverlag publishing group. This gave us close contacts to the sector and knowledge of the kind of information required by a readership that was spending more and more time looking and planning beyond national borders; an international network of experts, which enabled us to build up a top-class pool of correspondents; and, finally, the conviction that multinational players would welcome the information provided by a quality-oriented trade magazine. Oh, yes, there was something else that was vital for the success of the idea: the dramatic developments taking place in the IT sector. Without the internet, without the benefit of immediate intercontinental communications, which were just emerging ten years ago, the outlook for FoodService Europe & Middle East would have been bleak. And that holds particularly true of our e-paper launched two years ago.

**Today, we know:** the time was well chosen. Technological developments had progressed far enough. Europe was also far enough: the euro was launched in 2001 – a statement, a symbol, a quantum leap. Moreover, the foodservice sector was far enough to embrace new and more wide-ranging perspectives. We are delighted and thankful that FoodService Europe & Middle East has been accepted by the big names of the sector as an information and communication media, as a trend seismograph and a source of inspiration. We are also particularly grateful that many of

them welcomed, encouraged and promoted the idea of launching a multinational trade magazine from the word go. And this includes the downstream side of the industry, the suppliers. Indeed, they were the source of the extremely productive idea of expanding the scope of our publication to include the Middle East. Their involvement as customers and partners, many of them from the very first, also represents a great vote of confidence in our editorial ability, in our strategic orientation and, in the last analysis, in our brand philosophy.

**The joint focus:** content and community. A policy that originally applied to the German magazine has been extrapolated to cover multinational terrain. Only two years after the launch, the initiators joined forces with the Gottlieb Duttweiler Institute in Zurich and the University of Central California to create the European FoodService Summit, a unique venue for learning, making contacts and communicating on the highest plane. To be held this autumn for the 9th time, the European FoodService Summit is nowadays an institution and a must for many regular guests. In other words, it's what people need!

A stimulating decade lies behind us. A decade characterised by joint developments and huge leaps of knowledge. One of the most important benefits is that we now understand each other better despite the multiplicity of dining and gastronomic cultures throughout the world. Our vision was to help build up a multinational food-service family – and we regard this as an ongoing incentive to be a member of the family and the voice of the industry. A belated birthday present will follow in the autumn: the English website at [foodservice-europe.com](http://foodservice-europe.com).

**Once again, our thanks** for the multifarious input, as well as for support and good will, are due to our correspondents throughout Europe and around the world, and to our readers, network partners and customers. We look forward to the next decade in your company!

ANNIVERSARY



# The Team Live

Like cooking, publishing a trade magazine is something done primarily by people and not machines. We in the editorial offices work together with many correspondents around the world. In Frankfurt am Main, Germany: large photo, in each case from the left – front: Gretel Weiss (Publisher and Editor-in-Chief) and Marianne Wachholz (Editor-in-Chief).

First row: Christian Heinrici (Sales Manager), Birgit Gendritzki (Sales office), Ines Knetsch and Christine Kummer (Graphic artists). Second row: Nicole Seitz and Petra Petrasch (Distribution), Jutta Pfannschmidt-Wahl (Editor), Sabine Neuf

(Marketing), Barbara Mecke (Editor) and Anke Nowatzki (Sales).

Third row: Katrin Siebel, Katrin Schendekehl and Susanne Corinth (Editors), Jutta Leopolder (Editorial office), Heike Hucht (Editor) Christine Haeuser (Editorial office) and Philipp Laqué (Marketing Manager). Back row: Sabine Mueck (Sales office), Ute Antoni (Editorial office), Christiane Pretz (Division Manager), Markus Gotta (Company management) and Klaus Gast (Distribution Manager).

The individual photos show ten of our long-standing correspondents: top row: Flavia Fresia

(Italy), Bruce Whitehall (UK), Anna Ludkovskaya (Russia), Conrad Freeling (France) and Karel de Vos (Netherlands). Next row: Howard Riell (USA), Sarah Campbell (Middle East), Mario Cañizal Villarino (Spain), Sofia Selberg (Scandinavia) and Puck Kerkhoven (Netherlands). And, in the margin, our photographer, Thomas Fedra. Naturally, most of them are not responsible solely for FoodService Europe & Middle East. That would be much too expensive. The majority work for several or even numerous other publications – belonging to the Deutscher Fachverlag Group or external publishers. [www.dfv.de](http://www.dfv.de)



## La autora Katrin Schendekehl

Me acuerdo muy bien de los inicios de la revista internacional Food Service Europe, pues nació justo cuando empecé mi período de prácticas en su hermana mayor foodservice, editada en alemán. El entusiasmo de mis redactoras-jefe Gretel Weiss y Marianne Wachholz, de “asomarse al exterior” y aprender de países más allá de Alemania, Austria o Suiza fue contagioso.

Y como escribía y hablaba castellano, me encargaron contactar en España, con un profesional experto en foodservice, capaz de facilitarnos, a nosotros y a nuestros lectores, información profunda sobre dicho sector.

Eran los principios de internet y a través de la red pude empezar a comunicarme con Mario Cañizal, en su calidad de gerente de ASCAREM (Asociación de Cadenas de Restauración Moderna), la hoy Marcas de Restauración, que no dudó ni un segundo en abastecer al equipo de redacción, noticias y novedades del foodservice en España.

Logré Bingo! como se dice en España. Es decir, acerté profesional y personalmente.

Ninguno de ambos podía pensar que nuestra relación duraría casi 25 años, en materia de circular información entre uno y otro; entre Barcelona o Madrid y Frankfurt o Colonia: entre una junior y un senior... Con Mario Cañizal, encontramos una persona capaz de armonizar lo español con lo alemán, a nivel de contenidos para la prensa profesional.

¡Y crecimos juntos! Nosotros exigiendo rigor mientras que él se afanaba por garantizar la verosimilitud de los datos. Datos de todo tipo, no solo locales y ventas, sino también, planes de expansión, ratios financieros, empleo, inversiones, aperturas... datos, datos y datos!

Fueron reportajes muy trabajados, donde nuestra redacción pedía desarrollar un tema que tras enviar Mario y revisar yo, suponía devolvérselo con un sinfín de preguntas, cuyas respuestas servían para corregir el artículo final que firmaba yo, él o ambos a la vez. Ello y mis viajes a España para reportajes especiales, aportó a la revista y sus lectores un completo conocimiento sobre el foodservice en España.

¡Y lo que hemos aprendido unos de otros!

Al investigar más allá de nuestros propios límites geográficos, fue como abrir una puerta a nuevos horizontes. A nuevos colores, olores, sabores tan extraños en ocasiones, como excitantes o estimulantes.

Todo ello en un mercado, donde sus empresas en algunos ámbitos sectoriales como la pizza, las cafeterías, las bocadillerías o los tapas bar, operaban con un original marketing-restaurant y un no menos inspirador diseño. Ya fueran locales de una cadena o de un independiente, los conceptos respiraban armonía entre el continente y el contenido, donde la oferta culinaria gozaba de notable creatividad, respaldada por la extraordinaria calidad de las materias primas locales.

Recuerdo sendas entrevistas con Ferrán Adriá e Ignasi Ferrer. Pese a ubicarse en polos opuestos, ambos tenían como común denominador el entusiasmo por “su” restauración. Nosotros, los alemanes, más cerebrales que los españoles, aprendimos de ellos que la gastronomía no sólo es comida, sino también una experiencia donde los sentidos tienen mucho que ver y que los procesos funcionan mejor si se les añade una sonrisa o se abordan los problemas con sentido del humor.

También, que lo tradicional (como las tapas) cabe dentro de la restauración moderna, o que la buena mesa puede replicarse en otros formatos, como practican ya numerosos chefs y que un país orientado al turismo, como España, sabe preservar su autenticidad culinaria, coexistiendo la individualidad (como los chiringuitos) con la sistematización o la internacionalización, cuya intensidad llega incluso a que, por ejemplo, Burger King sea capaz de superar a McDonald’s en locales y ventas.

En resumen, el mercado español que conocimos no dejó nunca de sorprendernos gratamente. No sólo por su activo propio, sino por su capacidad de adaptar corrientes internacionales (sushi, bowls, coffee bars, burgers...) a su target.

Y vimos como operadores mono marca se convertían en multi marca, llamando la atención de inversores extranjeros dispuestos a apoyar sus planes de expansión, en ocasiones con éxito en otras no, lo cual aprovecharían para reinventar marcas, culturas corporativas o incluso a sus directivos.

Hasta una capital, como Madrid, nos dio ejemplos de cómo gestionar la vida gastronómica, en tiempos de pandemia.

Muchos de nuestros encuentros con los líderes del foodservice español, ya fueran independientes (Disfrutar) o directivos de restauración de marca (Tragaluz), siguen siendo inolvidables por su afán, día a día, de mirar a su clientela, de adaptarse a su evolución y siempre como he citado, con seriedad y meticulosidad, no exenta de entusiasmo por la vida y disfrute. Lo que, a menudo, nos iba sorprendiendo.

España es un país muy cercano a mi corazón y Mario ha sido y sigue siendo el puente profesional hacia él.

¡Gracias por 25 años de armonía, personalmente gratificantes y profesionalmente enriquecedores!



## El autor Mario Cañizal

Más de 50 cincuenta años, trabajando de forma permanente e intensa en el sector alimentario, tras cursar estudios en las facultades de Económicas y Derecho de la UB, y un postgrado en Cornell NY, están teniendo como colofón dejar sentadas las bases de cómo la memoria histórica del sector de la alimentación fuera del hogar, ha de impregnar la cotidiana labor de las empresas de hostelería.

Medio siglo que tiene en 1992 su punto de inflexión. Hasta esa fecha, estuvo cimentando nuevas estructuras en el *food retail* con el apoyo del IRESCO: desde implantar un lineal y practicar *merchandising*, en las bisoñas cadenas de supermercados, a posicionar ALIMENTARIA, entre las tres ferias más grandes del mundo; fomentando desde ella, las relaciones comerciales entre España, Latam y Oriente Medio, a través de proyectos de cooperación agroindustrial apoyados por el Gobierno de España (éste y el de Venezuela, le galardonarían por su trabajo), dirigiendo misiones comerciales de exportadores españoles o realizando estudios sobre *joint-ventures* para Onudi o la FAO.

Labor que corrió pareja a iniciativas en el mercado español, como la creación de AECOC (fue su primer Secretario General), del primer despacho (JMT) de M&A, o aportando su conocimiento a la gestión de asociaciones de fabricantes marquisitas (Grupo Bonmacor), en especial relacionadas con el sector que, actualmente, se denomina bakery-café.

La ausencia de alianzas estratégicas entre los proveedores de alimentación y la neo-restauración, incipiente en aquellos momentos, con motivo de los cambios en los hábitos de consumo, del hogar a fuera del hogar y la respuesta a ofrecer a la celebración de eventos, como los JJOO de Barcelona y la Expo de Sevilla propició que, junto a otros reconocidos profesionales, creara la sociedad CATERDATA que, con sus publicaciones, estudios y eventos, le permitió conocer en profundidad las raíces del cambio de la hostelería tradicional hacia la restauración moderna.

Tarea que desarrolló contribuyendo a crear soportes de acciones colectivas, tales como ANTA para el fomento del uso de nuevas tecnologías de producción (*cook chill* y *sous vide*) o gamas de producto (IV y V); SANDWICHFORUM para la introducción del bocadillo como plato principal en los menús; el GRECO, para coordinar las estrategias de las divisiones de *food service* de fabricantes marquisitas o la creación de la asociación de cadenas de restaurantes, la actual MARCAS DE RESTAURACION, siendo su primer gerente, sin menoscabo de colaborar estrechamente, en materia de alimentación colectiva, con FEADRS (FOODSERVICE ESPAÑA) y la propia patronal del sector, hoy, HOSTELERIA DE ESPAÑA.

Tal cúmulo de conocimientos y experiencias, las ha querido verter al sector, a través de sus servicios de consultoría y de escribir tres libros sobre *food service* y varios e-book sobre sostenibilidad en restaurantes y el origen de las cadenas de restaurantes, dictar conferencias y charlas en escuelas de negocios como el INSTITUTO DE EMPRESA, el INSTITUTO SAN TELMO o ESADE, facultades gastronómicas como el BASQUE CULINARY CENTER o el CETT y ser editor y redactor de revistas profesionales españolas (en su primera etapa escribió, y mucho, en ARAL y DISTRIBUCION ACTUALIDAD) tales como CATERNEWS, RRR y RESTAURACION NEWS, la francesa NEORESTAURATION MAGAZINE, o la alemana FOOD SERVICE EUROPE.

En los años, 2016-2020, con el apoyo del Ajuntament de Barcelona, asumió, el reto de materializar su inacabado proyecto: instaurar la sostenibilidad en los restaurantes. Para ello, desarrolló un proyecto que constará de, desde reuniones internacionales a módulos formativos, pasando por estudios para su implantación y la creación de una red de asociaciones de restaurantes sostenibles, cuya actividad dará lugar a la creación de la FUNDACION RESTAURANTES SOSTENIBLES.

Entre 2021 y 2024 su labor profesional obtendrá el reconocimiento de entidades tales como MARCAS DE RESTAURACION, FUNDACION DIETA MEDITERRANEA, FOOD SERVICE INSTITUTE o ALIMENTARIA (con un Hostelco-Awards), a través de premios y galardones.

En la actualidad prosigue su labor de recopilar su actividad profesional, desde 1975, a través de trabajos monográficos y tras editar dos e-book titulados “La Restauración Colectiva también existe” y otros dos sobre “A recent history about the Food Service in Europe (1998-2022)” se dispone a finalizar la colección de e-books con el titulado “De la Idea al Legado” donde esbozará las principales líneas de trabajo de la etapa inicial de su carrera profesional, con especial referencia a su etapa en la feria ALIMENTARIA, durante las ediciones de 1976 y 1978 y desde donde contribuyó a poner algunos de los pilares que sustentan el sector alimentario en la actualidad.



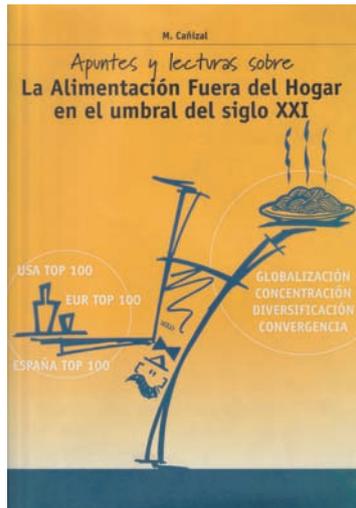
# Publicaciones sobre el sector de Food Service de Mario Cañizal

1996



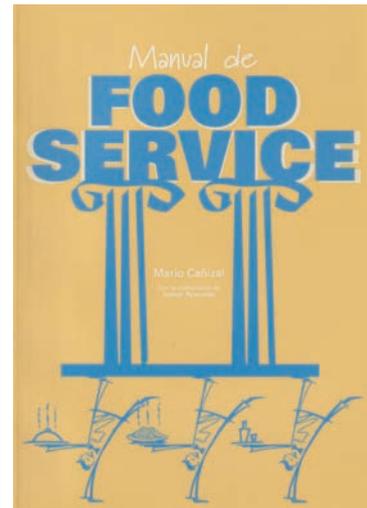
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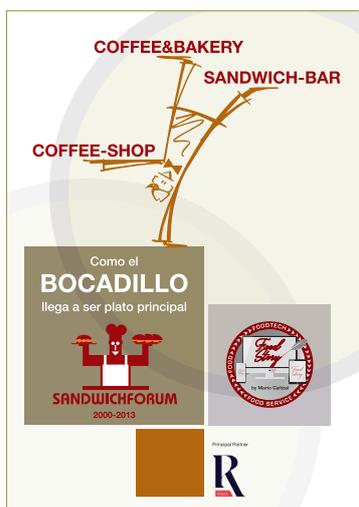


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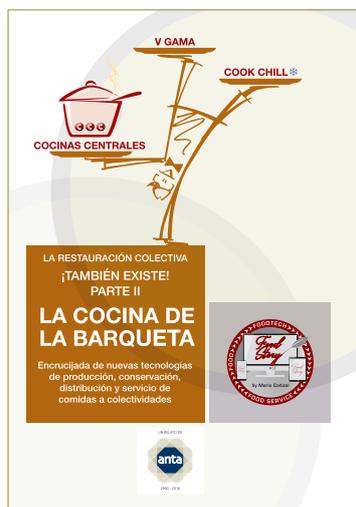
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