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 II: 2011-2022

A Compilation of Articles and Opinions from

EUROPE & MIDDLE EAST foodservice

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FOODTECH

Food Story

by Mario Cañizal

FOOD SERVICE

Presentación

Miguel Nigorra

Sobre la internacionalización de la Restauración de Marca

Nací en una familia de hoteleros mallorquines, en 1957, con lo que desde pequeño comía de platos con origen en la dieta mediterránea, sobre todo porque la logística de la isla era bastante peor, entonces que ahora y básicamente se consumía producto local.

Esta historia que hoy les quiero contar consta de dos partes; la primera comienza en el año 1994, nada más y nada menos que 19 años desde el fallecimiento del penúltimo jefe del Estado y 16 desde que nos habíamos dotado de una nueva Constitución; sin embargo, algunas de las estructuras de representación empresarial de la época, funcionaban como en 1970.

Había sucedido un incidente en una cadena de hamburgueserías americana, de moda en aquel momento, y los medios de comunicación y voces tan reputadas como las de un catedrático experto en alimentación, con muchos años a sus espaldas, se habían lanzado a la yugular de la nueva ola de restaurantes que nos invadía, por considerar que atacaban directamente, a nuestra maravillosa dieta mediterránea.

Yo tenía entonces 37 años y sólo 10 en España porque había iniciado mis primeros pasos profesionales en Francia y dirigía una cadena de restaurantes en centros comerciales, observando con estupor que las entidades de representación empresarial de la época, o miraban para otro lado o alababan las palabras del decano catedrático.

¡No podía ser!

Teníamos un país en evolución permanente, una restauración diversa y creciendo, y unos señores que no querían que nada cambiara eran nuestros representantes, los de los empresarios, digo. Por ejemplo: El Convenio Colectivo de aplicación en cada restaurante era el provincial, y el más caro oficialmente era el de Granada, que como todos conocemos lo sigue siendo, a nivel del estado español.

Inquietudes, éstas y más, me rondaban por la cabeza y alguien me contó que había un inquieto de la restauración, un tal Mario Cañizal, que organizaba en Alimentaria-94 un sector monográfico de foodservice: Caterama (después se llamó Restaurama) y allí que me planté; para después de ver lo que era capaz de hacer, pedirle si me quería ayudar en cambiar el modelo asociativo, en el que no encajaba la nueva restauración. Contra todo pronóstico me dijo que sí.

Con su ayuda y la de colegas míos, también preocupados por la situación, dirigiendo ya flamantes grupos de restauración,

nació Ascarem (Asociación de Cadenas de Restauración Moderna), que para incordiar más al sector tradicional se constituyó y adquirió personalidad jurídica, en un lugar de restauración moderna por excelencia: Port Aventura.

Pese a ostentar la primera presidencia de la asociación, Mario fue el verdadero motor de ese germen que, hoy, tras varios cambios de nombre, presidentes, secretarios, gerentes o directores, se llama Marcas de Restauración, asociación felizmente plenamente representativa de los intereses empresariales del sector.

Ambos nos sentimos orgullosos de aquello porque costó mucho montarlo (menos mal que Mario se ocupaba) pues hubo que convencer, uno a uno, a bastantes directivos y propietarios de las cadenas para que se unieran y nos echaran una mano, dada la necesidad de lograr la debida representación profesional.

Al cabo de dos años, circunstancias empresariales me llevaron a dirigir otro tipo de empresas de hostelería y tuve que abandonar la presidencia de Ascarem; sin embargo, Mario supo seguir la hoja de ruta que diseñamos, para el desarrollo de la asociación.

Desde entonces, y va para 30 años, nunca hemos perdido el contacto y ahora, con motivo de su acción recopilatoria de “facts y figures” del foodservice a nivel europeo, me pide que les cuente algunas cosas del resto de mi vida profesional, por considerar que puedo dar una visión del sector a nivel internacional, desde varios prismas o puntos de vista.

Voy a complacerle y ahora viene la segunda parte de mi narración:

Después de dirigir una empresa de restauración multimarca y multiconcepto, filial de un conglomerado empresarial francés, con implantaciones en todo el mundo, a finales del 1996 me incorporé a Punto Cash, que era la división mayorista de Promodès en España, siendo su director general, hasta que en 2006 decidió venderla, y muy bien, a un importante grupo mayorista catalán.

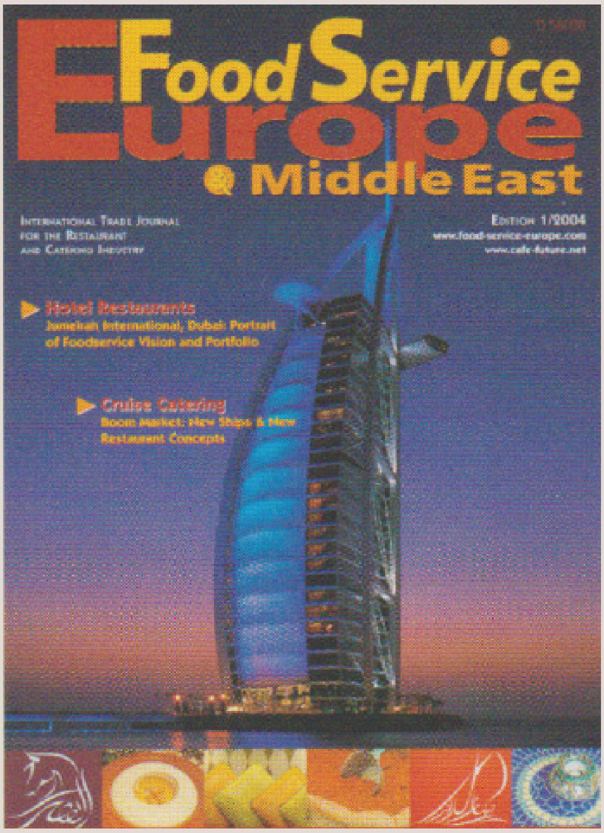
Fue una época muy interesante, con un negocio que había que sacar de números rojos y hacer rentable, mientras se producía la fusión de Promodés y Carrefour y con responsabilidades en el negocio mayorista en otros países, donde el Grupo tenía actividad.

Ello me llevó a trabajar y vivir en Barcelona, Madrid, París, Milán, Atenas…, muchos idiomas, muchas monedas, en lugares de dieta mediterránea, pero comulgando ya con la moderna restauración, y en una Europa y nosotros no éramos una excepción, donde se crecía a doble dígito.

Cuando se vendió Punto Cash, ya llevaba más de dos décadas en empresas francesas y decidí descansar un poco de la neo-restauración, de la distribución mayorista, de empresas francesas y sus directivos, cambiando de sector.

La paz sólo duró unos meses.

Mi nuevo desempeño directivo, corría 2007, fue en un negocio de madera para la construcción, donde como se sabe se compra mucho y se paga, vete a saber cuándo. Para subsanar tal mala praxis abrí el mercado de exportación en países de Norte de África, como Argelia o de Oriente Medio, como Siria, Líbano, EAU ,Qatar, Arabia Saudí o Irak, donde el auge de la construcción nos permitió salvar la empresa que, en el mercado interior, caminaba hacia la insolvencia.



En esos años aprendí que en los países árabes no se come dieta mediterránea, pero hay una cocina rica y sana, que he llegado a conocer bien y que obviamente va mucho más allá del tópico de lo del arroz con cordero o arroz con pollo, que es lo que nos cuentan los que terminan siempre la conversación explicándonos que, como en España no se come en ningún sitio y que como la paella de su madre o de su abuela ! en ningún lugar!

En ese objetivo de la internacionalización de la venta, que les recuerdo que tenía como objetivo pagar nóminas en España y salvar la empresa, tuve ocasión de conocer a mi siguiente empleador el Gruppo Cremonini.

Cremonini es el líder europeo en carne de vacuno con Inalca, uno de los grandes operadores de la distribución mayorista con Marr, y con una tercera pata en restauración comercial, sea o no en concesión, con marcas propias como Chef Express o Roadhouse; así como con posición de liderazgo en travel-channel.

Llego a la Dirección de Cremonini en España, en diciembre de 2010 para ejecutar la concesión del servicio a bordo de los trenes de Renfe, con plantilla de 2.900 empleados en la Larga Distancia y en la Alta Velocidad, cuyas operaciones generaban pérdidas mensuales del orden de 1.4M de euros y al ser un negocio con una inversión en CAPEX muy pequeña, las pérdidas eran prácticamente caja. Fueron tres maravillosos años más de mi aprendizaje personal en un negocio bajo criterios de empresa industrial de precisión, para servicios en concesión...

Al finalizar el contrato con Renfe, Cremonini me pidió que me mantuviera vinculado al Grupo, y trabajando para él desde Ankara (Turquía) y Moscú (Rusia) aproveché para aprender algo más sobre la cocina mediterránea turca, y un poco de la rica cocina eslava, que aunque pobre y sobre todo hipercalórica, por razones evidentes, es también rica y variada.

Rusia por su extensión puede tratarse como un continente y entre lo que se come en Sant Petersburg y lo que se come en Vladivostok hay mucha diferencia, pese a que a alguien se le ocurra el tópico de lo de la paella de la abuela. Diferencias que se extreman en lo que los voy a contar, sobre la restauración en los trenes que atraviesan dicho macro-pais.

Y es que, servir la comida a bordo de los trenes con trayectos que duran varios días y noches desde el origen al final, en viejos vagones restaurante y vetusta cocina, fue un fascinante reto que te vuelve a enseñar muchas cosas sobre producto, conservación de alimentos, horarios de los tripulantes, vacaciones, etc.

Un ejemplo.

La gran mayoría de los tripulantes de los trenes que recorren Rusia (exceptuando la alta velocidad) proceden de una región muy al norte en Siberia, tan al norte, que el viaje desde Moscú en tren + autobús y a veces trayecto final con tracción animal, puede durar siete, ocho, y hasta nueve días. Ida y vuelta entre 14 y 18 días.

Obviamente si pretendes aplicar criterios “occidentales” para los descansos semanales, mensuales y anuales, te encuentras con varios problemas:

1. Los tripulantes viven en el tren. Si les dices que paren dos días en semana se tienen que bajar del tren, que estará lejos cuando se acabe su permiso…

2. Bajarse del tren significa buscar dónde dormir, comer, etc. Y sobre todo pagarlo, que con salario siberiano no es posible en Moscú

3. Las vacaciones de 30 días anuales pueden significar que vean a su familia un máximo de 12 días en un año.

4. Ello lleva a las tripulaciones a organizarse entre ellos y es posible que un viaje de 11 días y 10 noches se repita seis o siete veces, sin descanso, para acumular los días necesarios para ir a su casa a ver a los suyos. Aceptar que eso es así y que no se "puede/debe" cambiar sin que ellos mismos ofrezcan una solución, forma parte de lo que se aprende.

Esta situación es una de muchas vivida durante estos años de conocer los antiguos territorios de la ex URSS; con lo que te vas dando cuenta de lo difícil que es eso de la internacionalización si pretendes aplicar un criterio homogéneo para gestionar, p.ej. en sitios como Armenia y Georgia o en Azerbaiyán o en Kazajistán, simplemente porque son vecinos, o porque hace unos pocos años formaban parte de eso que llamábamos "los rusos ", sin más.

Así pues, hacer las cosas bien requiere un enorme esfuerzo de hablar con la gente, escucharla y tratar de entender su punto de vista, porque hacer negocio, extramuros, significa vender en un lugar diferente al propio y a través de personas de ese lugar, que tienen que entender lo que se espera de ellas y sentirse respetadas y tenidas en cuenta. Mucho más en países en los que durante décadas tomar decisiones no era permitido, en el trabajo, en ninguna de sus instancias o departamentos.

Otro ejemplo, quizá menos extremo, sería el de mi experiencia con la alta velocidad en Arabia Saudí. Estando en Moscú nos llegan noticias de que el Consorcio Haramain está terminando el tren de Medina a Meca y Renfe está buscando un operador para la restauración a bordo. Y por hacer breve el relato, sin muchos medios y un esfuerzo ímprobo, conseguimos con un socio local, el grupo Bin Saedan, arrancar el proyecto y dar de comer a bordo, desde el primer viaje en pruebas hasta la inauguración del servicio comercial. ¿Se imaginan el perfil de comensal usuario de este tren con destino a uno de los centros religiosos más visitados del mundo? -

Si encontrar la manera de "vender tu producto" en los países árabes es un ejercicio de ganarte la confianza de tus interlocutores locales (a veces mucho más importante que unas décimas de mejor rentabilidad), la dificultad de hacerlo en el sudeste asiático es, bajo mi punto de vista mucho mayor.

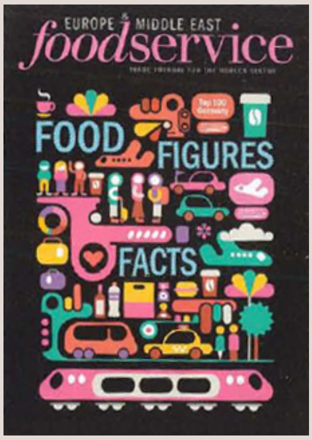
¿Qué tienen que ver los malayos y los japoneses, aparte de que viven en Asia?. La respuesta es nada.

La internacionalización es una tarea muy complicada, porque debes vender tus productos y tus métodos de gestión en lugares donde son absolutamente desconocidos y en algunos casos contradictorios.

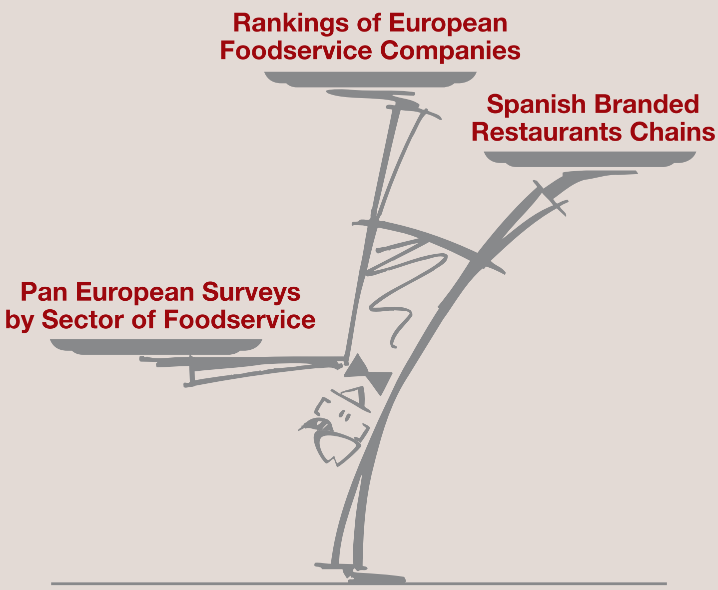
Programar semanas con cinco días de trabajo en lugares como China o Filipines supone recibir una llamada inmediata de que te falta un día en la programación, o dos, según el caso. Cuando explicas que lo estás haciendo "a la europea" para que la gente concilie, estás creando un conflicto porque estás ofreciendo al competidor una ventaja de costes significativa.

De modo que, exportar o establecerse en el exterior sin socio local puede llegar a ser un suicidio, a medida que el país se va alejando geográfica y culturalmente de tu mundo empresarial.

Hay algunos países donde no es posible abrir un negocio sin un socio local, pero mi punto de vista es no hacerlo nunca, sin ese socio local. Te ahorrarás años de aprendizaje y probablemente muchas pérdidas por falta de pericia para resolver las especificidades locales y si el socio es bueno, quién te dice que ese aprendizaje no te va a venir bien para aplicarlo en Casa.



Espero no haberles aburrido, pero si ha sido así culpen a Mario, que ha querido les recordara que no hay que olvidarse de lo que sucede en los mercados exteriores (en sus sectores, empresas, lideres empresariales) y de quien podría ser un partner para abordar un plan de expansión internacional.



Introducción

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En otoño de 2022, la importante editorial alemana de prensa profesional, dfv, 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 Weiis y Mariannae 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 Neorestauration Magazine, que con Livre Service Actualités, creadas por el editor frances Jacques Pictet, eran de lo más léido 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, por 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 Schenkendehl 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 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 numero 1 se publicó en 4T de 1998, es un incunable que no llegué a leer) hasta el ultimo editado, con el fin de seleccionar aquellos trabajos que merecería la pena rescatar de la edición en papel (la dfv pone al servicio del interesado un archivo bibliográfico/digital de indudable valor) y publicarlos en un a modo de e-book.

Y los motivos que me llevan 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, de 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 Neorestauration Magazine y otra prensa profesional internacional, como un servidor.

Les introduzco a continuación en un segundo bloque de material informativo editado por FSE&ME entre 2011 y 2022, etapa donde lo saludable, sostenible o lo digital adquiere prioridad en los reportajes sobre la evolución de la restauración de marca y por supuesto los efectos de la pandemia "in y post".

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.

Resumen Ejecutivo

La recopilación de reportajes publicados en la revista FoodService & Middle East en el período 2011 hasta otoño del 2022 reflejan como en la etapa anterior, reseñada en la parte 1 de este trabajo, la madurez adquirida por el sector de foodservice, especialmente los restaurantes, en la mayoría de los países de Europa Occidental, ya sean nativos o procedentes de otros países, los cuales dan cumplida respuesta, con una variada paleta de formatos, donde predominarían los pertenecientes al QSR, a la evolución de una clientela (así demostrarán informes de la hoy Circana o del GDI) capaz de combinar y alternarlos según unos, momentos y motivos de consumo, que se han alargado hasta límites imprevistos al comienzo del siglo XXI, fruto de la universalización del uso de las RRSS.

Es una etapa en la que se presencian los primeros tropiezos de conceptos considerados como icónicos por la profesión y donde se incorporan a su "jergon" términos (y lo que suponen) como omnicanalidad, digitalización, sostenibilidad, robotización e incluso resiliencia, como consecuencia de la pandemia.

Son años de cambios. Apelando a la célebre frase de Lampedusa, "si queremos que todo siga como está, es necesario que todo cambie" los lectores de la publicación serán testigos de cambios en su dirección y diseño.

Las pioneras WyW cederán sus competencias primero a Andrea Lötmann que relevará a Gretel Weiss, aunque al poco tiempo de su llegada, será sustituida por Boris Tomic, el cual trabajará conjuntamente con Marianne Wachholtz, hasta asumir en solitario los destinos editoriales y redaccionales de la revista.

Por su parte, la revista, coincidiendo con el 20 aniversario de su salida y la celebración de la feria Anuga en Colonia, modificará su maquetación y diseño; muy de utilidad para un cambio también de secciones y contenido, consciente la editorial que más temprano que tarde llegaría el definitivo relevo de la información en papel por la de tipo digital.

De ambas novedades, profesionales y restyling se han seleccionado sendos editoriales firmados por WyW (interesante su "in a nutshell") y Tomic.

Yendo a comentar aspectos destacables de las secciones cuya nomenclatura se mantienen igual que la que se usa en la parte 1, los Surveys van evolucionando del tratamiento de conceptos de restauración a temas horizontales donde se tratará por ejemplo la digitalización, la sostenibilidad, lo "healthy", las dark kitchen o la robotización y situaciones de palpitante actualidad como los efectos de la pandemia en el sector, la convergencia del food retail con el food service o de un contract catering, cada vez más partidario de conceptos de restauración comercial para atender a su cada vez menos cautiva clientela.

Los rankings, tanto el de empresas por ventas como el de coffee-bars por locales seguirán enriqueciendo la información sectorial; el primero siendo presentado por Gretel Weiss, en cada Summit, hasta su retirada y el segundo constituyendo casi un número monográfico con profusión de noticias (colaborará Allegra) sobre nuevos operadores en países donde hasta hace poco no era un sector básico del foodservice, que irán desplazando a aquellos españoles que habían animado los primeros ranking y que ahora hay que buscarlos, si aparecen, a partir de la mitad de la lista hacia el final. En este período la rivalidad por alcanzar el liderato entre McCafé, Costa Coffee y Starbucks, se decantará del lado de la marca originaria de las antípodas.

Destacar de los Top99 la absoluta hegemonía de McDonald´s en Europa, abarcando el 21% del conjunto de las ventas de quienes componen la lista, avasallando con otras empresas norteamericanas el mercado europeo, hasta el 39% de esa cifra en 2019, cuando diez años antes sólo era del 32%, con una posición singular de todas ellas en España y países escandinavos y de las que Yum! llegaba a lograr estar presente en 54 países, por encima de los 39 donde operaba la empresa de los arcos, mientras 20 marcas del ranking, tan sólo operaban en un país, destacando el grupo francés Bertrand ubicado en la posición 12, facturando por encima de los dos mil millones de euros.

Con relación a los reportajes tratando exclusivamente la restauración de marca en España, éstos no tuvieron la visibilidad lograda en la primera etapa, fruto quizá de la nueva orientación informativa de la revista y por la aparición de reportajes de países que hasta el momento no habían figurado en ella. Pese a ello, grupos como Larrumba o Flax&Kale (Jordi Barri fue speaker en una de las Summit) se dieron a conocer en Europa a través de la revista, así como la pujanza de Madrid como ciudad con una nueva restauración de marca, amenazando a Barcelona en el liderazgo de nuevas tendencias y aparición de grupos de restauración.

Las Summits de esta etapa se caracterizaron por ser consecuentes con la filosofía marcada por el triunvirato fundador (Weiss, Bosshart y Muller) es decir, tratar sobre cómo anticiparse a los cambios de la demanda formulada por la clientela, identificar tendencias emergentes y actuar de puente para que las empresas afrontaran el necesario cambio tecnológico que se les venía encima. Por eso encajaron bien Claus Meyer y Howard Schultz con el visionario Nordstrom.

De nuevo las soirée navegando por el Lago de Zurich con el catering servido por Marché International sirvió para hacer amigos y business a la vez. Y quien quiera conocer de forma resumida las conclusiones de cada meeting, solo tiene que revisar los “breviarios” (Bites for thought) del profesor Muller.

Datos sobre el comportamiento del mercado figuran en la sección Analysis Market, eligiendo las presentaciones de directivos de NPD-CREST (hoy Circana) donde Jochen Pinsker se hará casi imprescindible, tanto en la revista como en las Summit.

En el capítulo denominado con el pomposo nombre de Essentials&Fundamentals hay piezas informativas de indudable interés. Figuran desde el resumen de una charla impartida por Ignasi Ferrer que causó sensación, hasta reportajes sobre países destacando Rusia, al cual se le dedica suma extensión como consecuencia de “lo que pudo ser (como mercado) y no fue”.

Además, este capítulo contiene una veintena de entrevistas, básicamente, con directivos de empresas de restauración de marca que, a riesgo de exageración, podría considerarse “lo mejor de lo mejor” de esta selección de reportajes que contiene el ebook.

No en vano, el “bread power” ha sido capitaneado por profesionales como L. Le Duff; H, Holder (Paul) o viniendo de más allá de Atlantico, por Ron Shaick (Panera Bread) éste ultimo de actualidad al entrar en el capital de Honest Green desde el fondo Act III. Y si hablamos del concepto market-restaurante, ahí figuran representantes de La Place o Marché International; ambos superados en la actualidad por Eataly.

Sobre la consolidación del travel channel como sector con identidad propia en el seno del foodservice seleccionamos las entrevistas con directivos de HMS Host (Autogrill) y SSP, mientras que recuperamos a la sueca Max Burger para hablarnos de su talante pionero en materia de sostenibilidad y recordamos la importancia del diseño presentando las opiniones de Alan Yau (repite respecto a la parte 1) y a Benjamin Calleja.

Termina el capítulo con una serie de recortes y editoriales de WyW útiles para subirlos a una antología de éstos en las revistas profesionales de foodservice y otros de Boris Tomic, en especial el que relata en una especie de decálogo el pensamiento y opinión de la revista sobre el mercado que trata, al filo de concluir la segunda década del siglo XXI.

The Gallery es el típico capítulo donde figura lo ultimo de lo último o aquello que uno cree que no debería figurar en los capítulos reseñados: podria haberse llamado Miscellaneous.

ÍNDICE

Pan European Surveys

1

Los pan-european Surveys que se han publicado en cada número de FSE&ME, desde su aparición, han tenido gran utilidad para saber quién era quien (empresa), en cada país y actividad reseñada.

De este modo, conocer el comportamiento de las marcas hegemónicas de QSR (en esta etapa se habla más de burger que de pizza pero igual o más de “between the bread”) o casuals-restaurants (tematizados en carnes, pescados o vegetales) o conocer sobre temática horizontal, como alimentación saludable, residuos, robotización o incluso comportamiento ante la pandemia, ayudan a plantearse estrategias de desarrollo, ya sea en materia de marcas, excelencia operacional o expansión internacional.

En los Surveys la redacción de FSE & ME no dejó nunca de contar con la información del foodservice en España, la cual por la extensión que les otorgaba a los reportajes. debió ser del agrado de quien los planificaba y por supuesto, de los lectores.

Habrá quien dirá que conocer, en la actualidad, la situación de esas marcas en los primeros años del siglo XXI apenas es útil. Quizá; pero entre las páginas seleccionadas emergen no sólo marcas que perduran, sino también sus emprendedores, que han sentado las bases de las que crearon inicialmente y de “todo” lo que vino después. Algunos de los cuales fueron entrevistados y una selección de ellos figura en el capítulo Essentials&Fundamentals, tales como Alan Yau, Henry McGovern, Louis Le Duff o Mario Bauer por ejemplo.

En el cuadro adjunto figura la selección de Surveys recomendados y de los que se puede solicitar copia a la dfv mediante mail a: www.dfv-archiv.de

Para que se conozca su estructura y contenido se publican a continuación: Good Food,Clean Conscience y Sandwich Solutions.

Selección de PAN EUROPEAN SURVEYS, etapa 2011-2022

Fecha de Aparición	Título	Contenido
2011	Food that Loves Life	Vegetarian
2011	Destination: Land of Plenty	Train Stations
2012	Better Burger Please (I+II)	Burgers
2012	For a Taste of Distant Lands	Latin Concepts
2012	Giving a Home to Beer (I+II)	Beer
2014	Filling Stations for Empty Stomachs	At Petrol Stations
2014	Cold and Sweet Temptation	Ice cream
2014	The World´s Local Food (I+II)	Italian Cuisine
2014	Healthy Hero from the Far East	Sushi
2015	Artisanal,Honest, Authentic (I+II)	Burger
2015	More than Daily Bread (I+II)	Bakery Cafe
2016	More Choice for Travellers	Train Stations
2016	In Love with Chicken (I+II)	Chicken

Selección de PAN EUROPEAN SURVEYS, etapa 2011-2022

Fecha de Aparición	Título	Contenido
2016	In Love with Chicken (I+II)	Chicken
2016	Good Food,Clean Conscience	Vegetarian&Veganism
2017	Rolling Up The Fast Food Market	Burrito
2018	Creative Craft (I+ÌI)	Beer
2018	Beefing it up(I+II)	Steakhouses
2019	The South Seas in a Bowl	Poké
2019	Bakers go Foodservice	Bakery
2019	It´s Egg Time	Eggs
2020	Food from out of whert	Ghost kitchen
2020	Fish is Fun!	Seafoods
2020	Overcoming the crisis	Covid-19
2020	Sandwich Solutions	Sandwichs
2020	Ready for Robolution	Robots
2021	War on Waste	Waste
2022	Ready for take off	Airports

Good Food Clean Conscience (2016)

VEGAN CUISINE

Good Food, Clean Conscience

France

Vegetarianism and veganism were long considered in Europe as ascetic and prohibition-obsessed lifestyles, propagated by only a small group. For some years now, however, the industrialisation of foodstuff production from animal sources and concern about diminishing resources have caused more and more people, particularly young people, often in urban environments, to give up food and beverages which may cause harm to animals. Restaurant owners offering their guests solely vegan food are niche operators, but they are growing in number, and now you can enjoy the best food and drink, not in self-denial, but with a good conscience.

France

Ranging from flexitarians and vegetarians to the purist, hard-line practitioners that go by the name of vegans and who eat no meat, no fish, no meat products, no eggs or egg products and no dairy products, there is a growing proportion of restaurant customers who are looking for vegetable dishes as part of the food they eat away from home, either occasionally or on a permanent basis. With a reputation for its uncompromising stance, the L214 association created the VegOresto site in 2015, which currently has 525 catering establishments on its books (restaurants, hotels, food trucks, bakeries).

They have all signed up to the **VegOresto** (www.vegoresto.fr) charter, which commits them to serve vegan alternatives every day; this entitles them to display the VegOresto symbol in the window to highlight their vegan and vegetarian dishes. Of this group, 187 restaurants are 100% vegan and/or vegetarian, with a minimum of at least one completely vegan option on the menu. 338 are 'mixed' – which means that they offer meat dishes as well as the vegan menu.

"Those chefs we have canvassed, who do not yet have menus with 100% vegan dishes, are concerned about exactly how to make it work. 'What food would I be able to offer?' There is often a trial period in the kitchen to start with, so as to be able to try out new techniques, new products, new textures and allow the staff to let their imaginations loose on this new approach," explains Bérénice Riaux, Campaign Manager at VegOresto. She continues: "The question that keeps recurring is that of sourcing; where do you find products that change things and that create a surprise? Where do you find practical alternatives for everyday things in a restaurant – mayonnaise, chantilly cream, ice cream? Where do you find vegetable 'milk', vegetable 'cream', vegan cheese? At the moment, in France, suppliers for the hospitality industry offer only a limited number of alternatives of

Good Food Clean Conscience (2016)

Good Food Clean Conscience (2016)


Thuy-Ha Bui


Thuy-Ha Bui

sauces and smoothies and the dehydrator for slow cooking, which preserves the vitamins and nutrients.

Rina Azria is not going to be content to leave things as they are. "In the medium term, I should like to find another place, near to this one, to put in an organic grocery store and a take-away restaurant." She is also planning to develop a catering service; so convinced is she of the potential demand (especially from companies). www.5lorette.fr

"In my view, a genuine concept must be based on a personal lifestyle choice, so that it is something that lasts and is authentic. An ethical commitment is an absolute requirement, a sine qua non," adds **Thuy-Ha Bui**, Raw Chef for vegan cuisine and patisserie. She is the young woman who writes the blog at www.toques-de-cru.com; she provides catering services for raw vegan food in France and Switzerland. She continues: "A vegan concept for a restaurant absolutely must be based on organic ingredients, so as to promote sustainable lifestyles that respect the earth and its people. The choice of gluten/lactose free and vegan also allows us to explore a new and extremely inventive kind of 'nouvelle cuisine', where vegetables are allowed to come into their own and where flavours are not masked through the addition of fatty animal products, not to mention the moral position vis-à-vis the animal kingdom." As far as the preparation is concerned, putting the principles into practice requires specific skills, all the more so if the food is served raw. "The main constraint is the need for extremely fresh vegetables, particularly if we are talking about raw food; an item that is not fresh stands out immediately, whilst cooking can hide a certain lack of freshness," stresses Thuy-Ha Bui. Cooks who want to put 100% vegan recipes on their menu must learn to "make vegetables the stars of the plate; vegetables are no longer the accompaniment, they are the centrepiece, and everything develops around and from their flavour, colour, texture and shape."

Cécile Van Lith is a caterer in Paris. Her brand – '**Betty Nu Food**' – relies on high-quality vegan dishes, both cooked and raw. Bright, sumptuous and colourful, her culinary creations drive a coach and horses through traditional ideas of veggie cuisine and are set off to best advantage by appropriate presentation. Launched at the beginning of 2014, the business has made steady progress, efficiently supported by word-of-mouth recommendation, particularly in artistic and fashion circles. A young female entrepreneur, her strategy to keep ahead of the numerous competitors, who are trying to position themselves on the vegan bandwagon, is to move even further upmarket and to diversify. She is giving herself about a year to adjust her focus. "We are going to open up a bit towards a more individualised target group. We have a plan for home deliveries of lunch boxes," Cécile Van Lith explains. At the same time, she expects, in the medium term, to open an outlet for ready-to-go food. "I want to perform a little magic on people, surprise them and get them to actually like recipes that would never have attracted them spontaneously," explains Cécile Van Lith, a former naturopath, who trained with professional chefs. "We currently work to order, for a minimum of around fifteen people." All the preparation is done in the production laboratory, with the finishing

Hank


Hank

Good Food Clean Conscience (2016)

this kind; we hope that in a few months from now, these few specialised supply chains will extend their ranges of vegan products in response to this ever growing demand."

How, then, can we recognise a 'true' vegan restaurant concept? "If you want to go down the 'healthy' path, you go organic," confirms Rina Azria, owner of the **5 Lorette** restaurant in Paris (9th arrondissement). Her 35-seater restaurant has been open for a year and is full every lunchtime. The menu is 100% organic and offers no meat at all. All products are gluten and lactose free and all cooking is done from scratch on the premises ('fait maison'). The menu, which changes every fortnight, is built round 4 starters (€8), 4 mains (€15.5) and 4 desserts (€8). Velouté, gazpacho, salad and savoury tarts: the ingredients of the starters change according to season. During the week, there is a set lunch menu with starter and main, or main and dessert at €21. The restaurant opens three times a week in the evening. "Vegan customers are gratified to find a menu that fits in with their philosophy. The others are content to eat vegan food; they know that there will be an appropriate nutritional balance on their plate and that they will not go hungry. On top of that, the fact that it's organic and made from scratch is seen as a guarantee of quality," the owner explains. There are three indispensable items of equipment in pride of place in the kitchen of her chef Faical Ouertani: the cold extractor for juices, the mixer for

Business Characteristics

- **Chains.** Most purely vegan restaurants tend to be small individual outfits. Many concepts, however, report a significant ambition to grow, or have already multiplied.
- **Culinary spectrum.** From street food to fine dining.
- **Locations.** Veganism is a city phenomenon in Europe. Here a relatively large number of vegan offers come together. Vegans from the country often put up with long journeys to eat at a restaurant without animal produce.
- **The operators.** Most are vegans themselves, learned to cook without animal products for that reason, and have developed their own recipes in a creative way.
- **Mission.** The desire to convert other people to the vegan lifestyle is mostly not a central motive, put it does play a part and sometimes creates strong opposition from meat eaters. Veganism is a subject of political controversy.
- **Guests.** Frequently, despite giving up animal products, many vegetarians, allergy sufferers and even omnivores – in many places up to 80%.
- **Supply.** Strongly growing range of vegan convenience and ready-made products over the last few years. Nevertheless many restaurant operators place the main emphasis on their own production – for quality and price.
- **Meat-substitute products.** At snack counters they are vital (sausages, burgers, escallops). More sophisticated concepts rely rather on creative vegetable cuisine.
- **Transparency.** Of above-average importance. Questions about ingredients and additives must be answered by trained staff.
- **Vegan options.** Can be found on more and more menus, opening up new potential turnover.

Good Food Clean Conscience (2016)

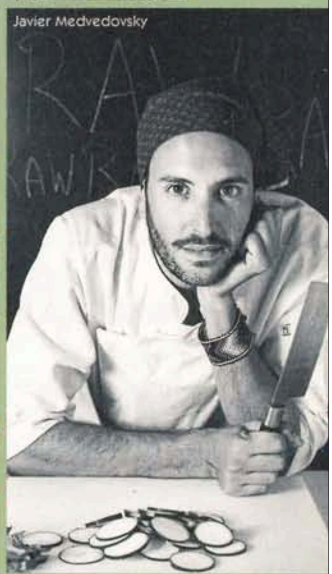
Spain

touches often being added at the last minute in the venue, where the food is being served. "Everything is done by hand; of course, there is a cost to it, but our customers fully understand that," she continues. www.bettynufood.com

At 55 rue des Archives à Paris (3rd arrondissement), the **Hank** concept promotes vegan cuisine through one of the iconic items of fast food, the burger. Behind it is Pierre Doléans, a vegetarian globe trotter turned committed vegan, who launched his restaurant idea in 2013. With five associates – Virginie Pelletier, Agnes Billet, Julie Huguen, Alexandre Fiault, Cyril Bouthors – he opened Hank Vegan Burger in January 2014. On the menu are vegan burgers, i.e. without any animal or animal-related products whatsoever. They are made with a lightly toasted fresh bun, thin slices of fresh tomato, finely chopped red onion, pickled gherkins and crunchy salad, with melted vegan cheese. Inside is an organic 'steak' made with fresh vegetables (carrots, beans, mushrooms) and tofu. Five different sauces individualise the burgers.

Mio Bio


Copenhagen


Javier Medvedovsky


Mio Bio

Spain: Restaurants with Mainly Vegan Offers

Madrid: Botanique ▪ La Encomienda ▪ Loving Hut ▪ Punto Vegano ▪ Rayen Vegano
Barcelona: Celerí ▪ Espiritual Chef (book) ▪ Gopal ▪ Sopa ▪ Vegetart ▪ Veggie Garden
Valencia: Copenhagen ▪ Kimpira ▪ Mio Bio ▪ Nomit ▪ Sonka
Bilbao: Bohemian Lane ▪ Gustu ▪ La Camelia ▪ Txarloska

Open 7 days a week from noon to 10 pm, the 25-seater restaurant reports an average of 300 customers a day, of which a third buy take-aways. There are two set offers: burger + side order (salad or potatoes) + organic beverage at €12, or €13 with a dessert. "The burgers are made to order, the salads, potatoes and desserts are prepared on site – all except for the sorbets," explains Agnès Billet. She goes on: "Ours is a mixed clientele. We want to bring vegans together round our vegan food, but we also want to see people who aren't vegans, but who enjoy trying something different, that is good quality and full of flavour." H.A.N.K.? It stands for Have A Nice Karma , a theme echoed by **Hank Vegan Pizza**, a second establishment opened by the six partners, two months ago, in the same district. This time they have chosen to operate with pizza based on vegan cheese.
www.hankburger.com

Spain

Fad? Fashion? Trend? Or more? The last! For both players and experts are convinced: the vegan style of diet is here to stay – even if, or precisely because, in a land of enthusiastic meat-eaters, it's not having an easy time. So devotees are particularly devoted and part-time fans have needed to come to terms actively with the maxims of purely vegetable diet. There are no purely vegan all-Spain formulas as yet, but vegetarian or flexitarian concepts like **Teresa Carles** or **Flax&Kale** in Barcelona are competing all the more briskly with special offers for vegans. Many of these have been founded recently or very recently, most are managed by individual entrepreneurs who, located in districts with a high visitor ratio, have targeted mainly local, diet-aware people and people working nearby, not primarily tourists. Their guests tend all to be young to middle-aged, they are of both sexes and prepared to shell out €20 for a visit.

It is interesting that the conceptualisation of the vegan streaming, unlike other trends, has not taken its rise in the major cities of Barcelona or Madrid, but in Valencia. This may be due to the fact that the East of the country is rich in fruit and vegetables, enticing for a cuisine based on foodstuffs without animal contents.

Pioneering status in this area goes to the formula **Mio Bio**, which describes itself as an "organic healthy restaurant and school". Opened in 2010 by vegan chef Emanuela Gornati and Sergio Brisa in a central location, this casual-dining address, furnished in warm colours like beige, white and black, influenced by feng-shui principles and built in sustainable materials, is a restaurant as well as a teaching centre. Balanced, healthy cuisine is served – the products are 100%


Sopa


Celeri


Celeri

Photos Celeri: Bea Schulze

Spain

organic, fresh and seasonal, hardly processed, and suitable for vegans or guests with food allergies. At midday the charge is by weight, in the evening à la carte. Best sellers are the salad with quinoa, dried tomatoes and avocado, plus the organic burger with seitan and caramelised onions. The lunch menu will cost you an average of €12.50; for à la carte the bill will be around €22.50. In the afternoons the restaurant is transformed into a school, with courses on healthy diet, including exclusively vegan diet, plus dietary advice. Estimated turnover is €350,000. www.miobio.eu

From an individual enterprise to a multiple idea with a Scandinavian name, despite Spanish 'authorship.' After all, the units run by Celia Aragó and Olga Vazquez since 2009 operate under the name of **Copenhagen** (Valencia and Madrid), **Malmoe**, **Oslo** and **Helsinki**. In the casual-dining restaurants, furnished altogether in a highly minimalist style, avowedly based on healthy, vegetarian diet and a symbiosis between a pleasant Danish-style spatial feeling and a culinary feel-good maxim, a creative Mediterranean cuisine is served which can easily be interpreted as vegan. Popular dishes are the 'Oslo salad' of pumpkin, potato, dried tomato, quinoa, (vegetarian) soy mayonnaise and boletus, or the 'quesadilla', stuffed with cheddar cheese, seitan and seasonal vegetables on Lebanese bread, served with pisto. The average bill is less than €20; estimated system-wide turnover €1.1 m. grupocopenhagen.com

In the North of Spain Bilbao is the area for vegan formulas. One of these is **Gustu**, opened in 2010 by Nieves Urrutia in the city centre. Under the motto 'organic healthy cuisine', the pharmacy graduate advises, teaches and cooks for her guests in a small room with student-type, self-made wooden benches and in an adjoining 'school.' It is interesting that Urrutia employs only female staff. The daily menus, the weekend menu and the tasting menu are based on local, seasonal products, which are refined creatively. There are 100% vegetarian or 100% animal-free dishes. Best sellers are the vegan 'Gustuburgers' for €13.50. The guests? 'Millennials', meaning aged 35 and younger. Turnover? Estimated at around €300,000.
www.gustubilbao.com

Veganism in Europe

"Since the 2000s, if not before, vegetarianism has been a 'blossoming field of study' in the cultural and social sciences. Today, the Gallup Institute and other major national opinion poll research institutes are talking about 'only' 1% vegans, 5% vegetarians and around 10-15% flexitarians in Western Europe and the USA. But it is clear that discussion of the topic is becoming more and more widespread in the media and that the number of products sold in the retail trade has grown significantly in recent years.

Since the first vegetarian society was founded in 1847 and the first vegan society in 1947 – both in Great Britain – the veggie movement has often been labelled as a rigid form of asceticism and anti-hedonism by traditional gourmets. Whilst this label for the founders of the movement, with their strong connection to the anti-alcohol and raw-food movements, was probably right, today only a few religiously strict veg* gastronomes keep to this ascetic path.

The intensified public debate about vegetarianism and veganism first came to prominence on the cover of Time magazine in 2002 with the headline, 'Should we all be vegetarians?' However, it was not until the autumn of 2009, with the publication of J. Foers' book 'Eating Animals', that this topic became the subject of fervent debate in all the relevant feature pages round the world.

Over the last 20 years, vegetarianism and now veganism have become a trendy lifestyle choice for the younger middle class and city dwellers. There is a growing range of vegetarian and vegan gourmet food on offer – if we are to believe the website Happycow.net/europe, there are now 10,000 outlets in Europe alone. According to the food experts at the British Guardian newspaper, this also means that, whilst, up to now, vegetarian food has never really been synonymous with fine dining, vegetarians have recently acquired many more options for upscale gastronomic experiences.

So, in recent years, a number of vegetarian restaurants have been recommended in the Gault Millau and Michelin guides for the first time. In 2015, there followed the first distinction to be awarded in Europe to a purely vegan restaurant.

What is particularly interesting economically for the restaurant trade as a whole, however, is the specific group of so-called flexitarians: people who still eat meat and fish, but who also find considerable appeal in high-quality, creative veg* dishes and who are willing to pay for them. Thus the inclusion of creative vegan dishes can help the restaurant trade to foster stronger brand loyalty amongst a consumer segment, that loves to experiment with new food and that also has, for the most part, high purchasing power."

Erwin Lengauer, member of the cultural and social-science department's vegetarian studies focus group at the University of Vienna, with a special research interest in bioethics.
fewd.univie.ac.at

Now where shall we go in Madrid? One idea is the **Botanique**, managed by Nacho Sánchez, at which the most popular dishes include the algae salad, the noquis with tomatoes, the lasagne, and the 'tarte velvet.' The graduate psychologist opened this vegetarian jewel under the umbrella of the market hall of Antón Martín in April 2015 as a result of his passion for healthy diet, and its menu includes numerous 'raw' ingredients, meaning only cooked under 42 degrees, because in this way all the characteristics of the foodstuffs are best respected and come to the fore. As for price, Sánchez's offers will cost €9.50 (without dessert) and €11 (with dessert). botanique.es

Earlier in the market was the **Loving Hut** chain under the direction of Ching Hai from Vietnam, which, along with the capital, also runs branches in Valencia and Málaga. The international formula of vegan Asian cuisine is a pioneer of a setting consisting of 'relaxed' internal decor and a menu adapted to the tastes of the local clientele. The outlet in Madrid can accommodate 45 guests – the average bill there is around €10. www.lovinghut.es

In Barcelona, along with notable concepts, it is above all the young Argentine chef **Javier Medvedovsky** who, following jobs at well-known Spanish establishments, has been increasingly the main ideas man in 'crude vegan cuisine' through his recipe book, 'Espiritual Chef', published this year. In this work, along with the right treatment, processing, germination and dehydration of vegan and vegetarian raw ingredients, he describes the extraction of juices and fermentation, plus suggestions for macerating, marinating and steeping. "Diet is a spiritual journey," he says and teaches this view on courses and through his mobile street-food outlet. His recipes have already found a favourable response on the menus of numerous restaurants which now offer dishes featuring algae, humus, avocado, cabbage, linseed seeds or tamari. espiritualchef.com

If you don't want to cook yourself, in the capital of Catalonia you will have for instance an opportunity to taste vegetarian and vegan food in **Sopa**. The casual-dining formula, launched in 2010, with a local atmosphere, offers vegan sandwiches and baguette snacks even at breakfast – for instance with date jam or tofu paste, and in the meantime there are tartlets, biscuits or desserts – plus a daily menu for €9.90 with a selection of two courses, consisting of four soups, two salads and three hot dishes, some of them with a 'micro-organic' slant. The popular dishes are soups, particularly those with pumpkin, carrots, ginger and cinnamon, lentils or artichokes. Of the main courses, the most frequently ordered is the seitan hamburger with plum and almond spinach. Along with the restaurant, Sopa has a shop selling organic products, a children's section and a yoga-practice area. Along with Barcelona, the concept has an outlet in Madrid and two on Bali. sopa.vg/en

Likewise not purely vegan but definitely noteworthy is **Celerí**, adjacent to the Avenida Diagonal, the brainchild of Guido Weinberg, owner of the Woki restaurant chain and the Woki organic supermarkets, which retail organic products. Directing the kitchen is Xavier Pellicer, who trained at various Michelin restaurants and who, using selected organic vegetables, provides the menu jointly with other cooks. Dishes feature about eight seasonal vegetables, which Pellicer reinterprets in three versions, one vegan, one vegetarian, and one third for those who eat animal protein. Food is prepared not out of sight but visibly in the eating area – including maximum transparency and interaction with the guests. Pellicer, influenced partly by the doctrines of the Ayurveda, sees diet in a holistic way, which does not preclude the biodynamic cultivation of raw ingredients in accordance with the lunar calendar. The environment is relaxedly modern – iron, wood and stone predominate in the selection of materials.


TIAN


TIAN

Tables are shared here, and the exchange of ideas is encouraged to flow. The lunch menu costs €25, the tasting menu €50, and the à la carte is available for about €45. Frequently ordered are the cereal gazpacho with vegetable cubes, grilled cabbage, served cold with Indian mustard oil, radish and marinated onions, or brioche made of coco-rice milk. Estimated turnover? €400,000 – the share of vegan dishes is estimated at 90% of food earnings. www.tribuwoki.com/en/restaurante/celeri

The future outlook for the concepts based on vegan diet is promising: young people are more motivated to practice a meat-free and/or purely vegetable diet; it is obvious that people are re-thinking. More than any price reduction directed to the guest, the task currently is to optimise purchasing. And vegan and vegetarian concepts should dare to move more into the centre of towns and cities. Along with tapas bars and big players in the fast-food business, the USP of such formulas could enjoy a far higher profile.

Austria

According to the Vegan Society, the proportion of vegetarians in Austria rose between 2005 and 2013 from 2.9 to 9% of the population. The Society believes that vegans account for between 10 and 50% of vegetarians, thus cautiously estimating the category of people who do totally without animal products at about 80,000 – 1% of the Austrian population. This includes more women than men, though the number of men, it says, is rising sharply: the ratio of young people and those with advanced educational qualifications in particular is higher in relation to the population as a whole. According to the Society, most vegans live in Vienna.

Accordingly the geographic focus of the 46 restaurants specialising in purely vegan dishes in Austria as listed on the Society's website likewise falls on Vienna, with a good two dozen providers. But in other major cities such as Salzburg, Innsbruck, Graz, Klagenfurt and Linz, too, vegans will now find concepts in which every animal product is avoided.

One of the pioneers of vegan catering in the Alpine Republic was Charly Schillinger, who in 1988 converted his parents' two-hundred year old inn initially into a vegetarian restaurant, and ten years later into a vegan one. Jointly with his wife Irene he has developed alternatives to Austrian plain cooking which are free of animal products. His motto: vegan cuisine should mean healthy eating, not dogmatic rejection, and so at **Schillinger's** there are purely vegetable versions of schnitzel, goose and cordon bleu at moderate prices of between €10 and 15 for the main course. These are ordered by guests 80% of whom are not total vegans, come from all over Austria, and sometimes will wait several weeks for a table.

In 2015 in Vienna the Schillingers launched their vegan burger chain **Swing Kitchen**, and recently the third branch – the first to be managed as a franchise – opened in Vienna's Shopping City Süd. Experts with experience at McDonald's and Vapiano helped to develop the concept, and two further outlets are due to join the network next spring, one of them in a former McDonald's branch in Vienna, the other in Graz. Berlin, too, is on the expansion plan, which expressly envisages international growth, abroad preferably via multi-unit franchising.

The menu includes four different burgers with soya patties or vegan schnitzel (solo from €5.20, as a menu from €7.90), plus wraps with falafel or vegan schnitzel filling, plus salads and side dishes. Wherever possible, the ingredients come from the region and from non-genetically modified cultivation; some carry the bio or fair-trade seal. All packaging consists of sustainable raw materials and is CO_2 neutral. The Swing Kitchen website shows the visitor the resources saved since the first restaurant was opened: thanks to purely vegetable ingredients, around 43 m l of water, 260,000 t of CO_2, 560,000 kg of grain and leguminous plants, and more than 900,000 sq m of agricultural land (as of November 2016) have not been needed or have not been produced.

With this morally-aware cuisine Swing Kitchen is attracting a broad public, mainly women aged between 20 and 40 – only a few of whom, however, are complete vegetarians or vegans. According to the company, the restaurants – which have seating for at least 50 – place ten


Swing Kitchen


Pirata Sushi


Yamm!

times this number of covers between 11 am and 10 pm.
www.swingkitchen.com
Likewise designed for expansion is **Yamm!**, a chain of vegetarian and vegan restaurants founded in 2011, which opened its first outlet on 750 sq m on the Universitätsring in Vienna City Centre and now has branches at the Praterstern traffic intersection and on the Vienna Naschmarkt. Under the management of capped chef Walter Schulz, Yamm! interprets Mediterranean, Asian and classic Austrian dishes at a high level and without animal products.
The heart of the restaurant is the buffet island, featuring hors d'oeuvres, salads, main courses and snacks, which are charged by weight (in-house €2.95, take-away €2.75 per 100 g). Soups, bread, pastries and desserts are ordered directly from the staff. In the morning there is a selection of breakfasts (€7.90-9.90), which can be supplemented with individual components (e.g. vegan rice pudding). Sweets and cakes, frequently also vegan, come from the in-house patisserie. Since May 2015 some of the bakery products, plus a selection of Yamm! dishes, can be found in Merkur supermarkets.
"The Yamm! concept was designed for expansion from the very start. Though not as a restaurant chain with dishes as standardised as possible and uniform image and presentation. Instead, starting in Austria and abroad in a few years, various outlets will introduce the Yamm! philosophy, enjoyment of food and *joie de vivre*, to our guests," explains founder Dr. Markus Teufel.
www.yamm.at
As a lighthouse of quality in vegetarian and vegan cuisine in Austria comes **TIAN**. At this restaurant in Vienna's Himmelpfortstrasse, Austria's only star-capped chef specialising in meatless cuisine is in charge of the kitchen: Paul Ivic. 90% of guests are meat-eaters and, when visiting TIAN, deliberately do without it, to discover how very much vegetarian food can extend the culinary range. A branch was opened in 2013 in the Vienna Kunsthaus, in the shape of the TIAN Bistro, a more traditional and deliberately more populist outlet; a further branch has been open since 2015 on the Spittelberg. These restaurants interpret traditional Viennese plain cooking in a modern way, without meat. Traditional Viennese classics and examples of traditional sweet-flour dishes are as much a part of the menu as international evergreens. About half of all the food is vegan, including the soup of the week and the dishes of the day on Thursdays. And vegan diet is promoted through campaigns on World Vegan Day.
The TIAN business includes an organic market garden, where the ingredients are produced ecologically not just for the TIAN kitchens. In 2014 TIAN opened at the Viktualienmarkt in Munich, with chef Christop Mezger, one of Germany's most talented young entrants to the profession, in charge of the kitchen; he recently gained his first cap and 14 Gault-Millau points. www.taste-tian.com
A small but unusual niche is occupied by 'sushi pirate' Alexander Lengyel. His concept, **Pirata Sushi**, does entirely without fish, instead using avocado, mango, salad, cucumber, sweet potato and other kinds of fruit and vegetables. Neither a vegetarian nor a vegan himself, Lengyel – whose parents run a number of sushi restaurants in São Paolo – follows a simple principle: fish only if the quality is 100% right. "And good fish is very hard to find in Vienna."
The small restaurant in the Seventh District fills a gap for all vegetarians and vegans who so far have had to do without sushi. His creations, such as Honolulu maki (bananas, ruccola, black sesame, 4 pieces at €4.50) or zuccamaki (pickled zucchini and sesame, four pieces at €4.80) are much appreciated by fish-eaters, too. With only six seats, the focus is on take-away business and a delivery service (foodora). Lengyel is in search of 'bold' investors and 'adventurous' franchise partners for expansion!
www.pirata-sushi.at

Good Food Clean Conscience (2016)


Hiltl


Marktküche

Switzerland

Switzerland

According to the Swiss Vegan Association, around one percent of the Swiss population is vegan. Independently of this, interest in vegan food has increased significantly over recent years, as shown by the growing range of vegan dishes in supermarkets and restaurants, says the society on its website.

At all events, Zurich has been a magnet for vegetarians for over 100 years as the birthplace of **Hiltl,** the western world's oldest vegetarian restaurant. Owner Rolf Hiltl represents the fourth generation of the family to run the business.

With seating for over 500 guests on two floors, the flagship restaurant in Zurich's Sihlstrasse was opened in 1898 and nowadays welcomes an average of 2,000 guests a day, who either serve themselves at the buffet of home-made hot and cold dishes or enjoy being served vegetarian food by attentive waiters. According to Rolf Hiltl, the share of completely vegan dishes has been rising for several years.

Despite its venerable age, the restaurant is anything but old-fashioned. On the contrary, it offers something for everyone with take-away options, a bar-lounge and dance club. In addition to the Sihlstrasse restaurant, Hiltl can be found in the Jelmoli department store in Bahnhofstrasse and, during the summer months, at the Mythenquai and Kilchberg lidos. Additionally, the company has its own Hiltl Shop with vegi-butcher's next door to the flagship restaurant. There, alternatives to meat, such as tofu, seitan, tempeh, Quorn and paneer are freshly prepared and cut to customers' requirements. The shop also sells a wide range of soya sausages, such as bratwurst and Frankfurters.

In the spring of this year, another Hiltl restaurant with buffet, take-away, bar-lounge and seating for 100 guests indoors and outdoors covering 250 sq m was opened in the 'Sihlpost' building, an old post office building on Zurich's future Europaplatz. This will be followed by a new outlet in the city's Langstrasse, also with buffet, take-away und terrace. Additionally, Hiltl is represented in all three classes on intercontinental flights operated by Swiss International Airlines. www.hiltl.ch

In 2000, the Hiltl family joined forces with brothers Reto, Daniel and Christian Frei to launch the **tibits** vegetarian fast-casual concept, which currently has eight units in Switzerland and one in London. The concept is based on the buffet principle with a choice of over 40 home-made vegetarian and vegan salads, hot dishes, desserts and soups, including vegan specialities such as Tandoori Tofu, Maniok Tikka Masala and Black Teff Burger. Customers pay by weight: CHF4.20 per 100 g or CHF3.70 for takeaways. Around 80 % of dishes are fully plant-based. On Vegan Tuesdays, all dishes from the buffet, including salads and desserts, are vegan from 10 in the morning. www.tibits.ch, www.tibits.co.uk

Radical & rock 'n' roll! Sisters Elif and Sibel Erisik come from a Turkish-Croatian family of restaurateurs and, since September 2014, have been serving vegan cuisine at **Elle'n'Belle**, their 120-seat, fullservice restaurant with its veteran furniture and innumerable knick-knacks at Zurich's Limmatplatz. Under their motto, 'It's vegan, Baby!', the sisters took third place in the Trends category of the 2015 Swiss Gastro Awards. Additionally, Elle'n'Belle came first in the Best Restaurant category and was the overall winner at this year's Swiss Vegan Awards.

Fast food, Asian cuisine, superfoods, 'veganised' classic und traditional dishes are mixed with gay abandon at Elle'n'Belle. The only prerequisite: the food must be fresh, organic whenever possible and, in particular, tasty. "For us, pleasure and quality are more important than strict adherence to the super-healthy principle," explains Sibel Erisik.


tibits

"And that's the reason why many non-vegans – from bankers to punkers – come to us – some of them even turn up wearing a fur coat!" She estimates that around 60% of guests are meat eaters and around 30% vegetarian.

The modest menu is changed four times a year. The signature product is the vegan 'Daddy Cool' wheat gluten doner kebab, which uses a secret blend of spices created by the sisters' late father. 'Daddy Cool' is served with 'Funky Fries' and costs CHF21.50. At lunchtimes, there is a special menu (depending on ingredients, the prices range from CHF19.50 to 23.50) with new creations being introduced every couple of months.

In the afternoon, the assortment is supplemented by cake, muffins, tarts and tiramisu. From 6 pm, a variety of set meals are added to the menu. At the 'Burger Bash' on Saturdays (11 am to 3 pm), the menu includes savoury snacks, breakfast and desserts in addition to three burgers with wheat buns.

www.ellenbelle.ch

Opened in 2013, it claims to be Switzerland's first vegan bio-restaurant: **Amazing Strength** and the associated **Vegelateria** in Zurich. The people, animal and nature-friendly concept philosophy is based in the spiritual teachings of Sri Chinmoy. In addition to more than 20 different varieties of vegan ice cream, seven to ten vegan dishes are offered every day at the 75-seat restaurant, e.g., bio-quality 'Zürcher Geschnetzeltes' from the buffet (100 g à CHF3.90), as well as soup, salad, desserts and a daily special dish. The operator is Soyana, a company that has been producing alternative milk drinks, tofu and other vegan products for over 35 years. There is also a choice of around 100 Soyana products for sale in the restaurant.

The ice cream is made without white sugar, preserving agents and artificial colour using soya or rice milk, almond purée, dates and whole-cane sugar. For hot dishes, Soyana products, such as spelt-based meat substitute Dinki, and vegan cream-cheese alternative Soyanada are used.

www.vegelateria.ch

"No imitations. Just creative cuisine" is the motto of the **Marktküche** fine-dining restaurant, opened in August 2014 in Zurich. Accordingly, the vegan restaurant (48 seats inside, 30 outside) uses no meat-substitute products whenever possible, preferring top quality vegetable and regional ingredients, such as home-made bread and pasta. The restaurant is aimed at a cosmopolitan clientele and focuses accordingly on light and quick lunches and an evening 5- or 7-course menu with an optional accompanying wine selection that is changed monthly. Prices start from CH89 for a five-course meal, which usually focuses on a special story or motto.

www.marktkueche.ch

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Sandwich Solutions (2020)

SURVEY

Sandwich solutions

When it comes to sandwich creations, there are no limits to creativity. While every country has their own typical varieties, restaurateurs in Europe are discovering the seemingly endless diversity of sandwich fillings, toppings and breads. Inspiration from the UK, the Netherlands, Italy and Spain.

Tōu's Iberian Katsu Sando

UNITED KINGDOM

From elegant classics like the cucumber sandwich to messy imports like the decadent Reuben grilled cheese, sandwiches have long been a mainstay of the British culinary palate. Figures from The Guardian suggest that the average Briton will spend £48,339 on sandwiches over the course of a lifetime. And thanks to the resurgence in artisanal bakeries, cafes, and delis – they can now do it in style, as this unsung hero is having something of a renaissance, with plenty of operators out to prove that there's more to a good sandwich than putting stuff between bread.

Perhaps London's most passionate sandwich advocate is Max Halley, the eccentric and loveable owner of **Max's Sandwich Shop** of Finsbury Park, North London. After working in some of London's top restaurants, Max decided it was time to open his own place in 2014 – on a mission to give the humble sandwich a bit of help. He wanted to make it bigger, better, and messier. Something that could be a proper meal. Something he could put as much love, care, and attention into as most chefs would

put into their main course – all wrapped up in greaseproof paper and an elastic band to save Max from washing up. All for about £10 a pop.
It's a simple and charming concept. Much like the décor of the sandwich shop, which Timeout Magazine describes as "endearingly and artlessly scruffy". As Max puts it in his characteristically Max way: "It's a late-night sandwich shop you can get pissed in." And people do, or at least, they did. Currently, Max's is only offering for collection. But before lockdown, it would seat about 1,000 customers a week, with only about 20% of trade take away.
While the vibe may be a bit quiet at the moment, the collection menu still offers many of the sandwiches that helped put Max's on the map: Et Tu Brute? Murdering the Caesar (Max's twist on the classic chicken Caesar), The Korean Gangster – (soy braised beef with kimchi and kraut, crispy noodles, and gravy mayo), and of course, his classic Ham Egg 'n' Chips. This was Max's first ever sandwich, emblematic of his approach to the sarnie. It's a classic pub lunch in a sandwich. Braised ham hock, slow cooked for eight hours, piccalilli, which Max ferments himself, shoestring fries, a fried egg, and malt vinegar mayo. Banging.
Commenting on the addition of the shoestring fries, Max says: "I feel very emotional about crisps in sandwiches. It's a great way to add a beautiful crunchy texture, without screwing with the flavour too much." All these ingredients are then carefully layered between two freshly baked slices of focaccia. It's always focaccia at Max's: "I spent a lot of time messing about with sourdough, but the problem with sourdough is that you have to fight it, the bread opens up, and the sandwich is ruined. Whereas focaccia retains its structural integrity, soaks up juice well, and keeps its shape, so that every bite always has a bit of everything" – something Max holds to be central to a true 10/10 sandwich.

Another place out to show that sandwiches aren't just for lunch time is **Hot Cut** of Golders Green, North London. Hot Cut does toasties. But not just any toasties. Foot-long baguettes, layer upon layer of freshly sliced meat, and handfuls of toppings, all dripping in saucy goodness. As the owner, Josh Nassim, puts it: "I still remember that first crisp crunch, the bread light as air, then this glorious mix of meaty saucy goodness. I knew then this was something I had to share with people." And share it he did. Before lockdown, on any given Friday or Saturday, you'd find the place crawling with late night revellers well into the early hours – enjoying enormous toasties, fries, and beer and a curious selection of music, ranging from Israeli to Trance. The décor is similarly off the wall – with at least seven different types of wall paper, dozens of light fittings of varying size and colour, and at least one wall mounted alligator, naturally…
However, during lockdown, Hot Cut has pivoted to be almost entirely delivery – using Deliveroo to satisfy

© Max

Max's 'The Korean Gangster'

some 95% of its orders, with typical spend per head sitting at around £9. While Josh is pleased to have found a new distribution channel in Deliveroo – he longs to welcome customers back. In a good week, Hot Cut would serve 700 or 800 people for lunch, dinner, and well into the early hours. For the meantime though, delivery remains the focus.
One thing that hasn't changed too much though is the menu. Customers still choose from one of three breads – white, granary, or rye – all baked fresh every day at the bakery Josh's family runs, Sharon's Bakery in Edgeware. Then things get meaty – smoked turkey, honey-glazed turkey, salt-beef brisket, and schnitzel are just some of the options on offer. Then come the toppings – slaws, krauts, pickles, jalapenos, you name it. Last but not least, the sauces. And at Hot Cut, they do mean sauces, plural. It's not uncommon for customers to order up to six or seven different sauces in one sandwich. Honey mustard? Sure. Hot green chili? Obviously. Pesto? Why not. 'Less is more' is not something you hear a lot at Hot Cut.

Now for something completely different, let's head over to **Tóu** at the Arcade Food Theatre on Tottenham Court Road. From the same couple behind cult pop-up Tātā Eatery (Ana Gonçalves and Zijun Meng), Tóu is dedicated solely to its owners' most famous dish, the katsu sando: a perfectly precise square of crustless bread containing a thick meaty filling, usually a meat cutlet fried katsu-style in panko breadcrumbs.
The menu at Tóu is as stripped back as refined, offering customers a choice between their famed Iberian Katsu Sando (toasted brioche, slow cooked and deep fried Iberian pork neck, shredded cabbage, sliced onions, raspberry brown sauce, and xo shallot sauce) or the Egg Mayo Katsu Sando (fluffy brioche bun, deep fried egg tofu, wasabi egg mayo, and coriander), charged at £14 and £10 respectively.
The plush food court which houses Tóu is sophisticated, if a little cold, with a slight retro feel. The clientele is predominantly Asian, many of them students from nearby universities, as well as an office crowd. In a typical week pre-lockdown, Tóu would serve around 400 sandos a week. But with Arcade temporarily closed, they've had to pause acitivity at their regular spot. Instead, they've focused on selling DIY kits via Instagram, now shifting around 70 kits a week.
Co-owner Ana Gonçalves says: "Our sandos are temperature-sensitive, so don't travel well. Which is why we've never really done delivery. But the DIY kits have gone better than we expected. I think because what we offer isn't something people can cook at home easily or get elsewhere. I think we'll keep doing them even after we re-open."

Rupert Bradshaw

"I feel very emotional about crisps in sandwiches. It's a great way to add a beautiful crunchy texture, without screwing with the flavour too much."

SURVEY

SPAIN

With the start of the new millennium, bread-based snacks began their triumphal march as a main dish in Spain, too. Henceforth this product group was to outgrow the trad-itional 'bocata' with cheese and ham, presenting itself today not only in a multitude of creations, but also with a varied, professional creatorship. The menu boards of the matadors in this segment indicate this dynamism. Sandwiches as a meal are also increasingly becoming food protagonists in bakery cafés, coffee shops, or beer-driven concepts. The desire for individualisation enlivens the wealth of ideas: along with classic white bread (in loaf form or crusty bread), come Provençal-style baguettes, focaccia, tramezzini, bagels, bread from old grain types, or with all sorts of seeds. The fillings are no less rich in variety; think: vegetarian, vegan, gluten-free or international.

Among the innovative, younger representatives of the sandwich business, **Sandwichez** deserves a closer look. This urban healthy sandwich bar, launched in 2010 under the management of Xavier Sánchez, now boasts 25 units and €11 m in sales revenues and offers its guests 'a second living room' even in quarters of Barcelona which other food-service providers initially avoided. You can select from twelve different types of bread, which are served with various fillings, hot or cold, as so-called 'entrepans' or 'flautins'. Especially popular behind Sandwichez' colourful façades are the 'New Yorker', with pastrami and marinated roast beef, or the 'bikinis' – a specialty peculiar to the capital of Catalonia, which has its origin in the Sala Bikini discotheque, opened in 1953.
Back there and then, white-bread sandwiches with cooked ham and melted cheese were heated in the pan. These sandwiches attracted great attention in the region and lent their name to numerous variations. They have been revived in a particularly many-sided way by chef Joan Gurguí in his eight-seater bar **La Bikineria** at the Ninot food market in Barcelona, where he offers gourmet sandwiches such as 'Carbonara', with


© Pans & Co.

The Pans & Co. menu offers twelve varieties of long bread snacks

peppered cheek of pork, parmesan, oregano, caramelised onions and egg yolk. Or 'Art I Gust', with grilled chicken, Gouda and apple aioli. Eight creations with prices between €3.60-6.90 are currently on the menu.

Similar eye catchers are the creations of Jordi Gavaldá of **L'Immoral** from Sabadell near Barcelona, whose street-food basics, costing €6-9 and featuring chicken durum, pulled pork or pastrami, innovatively straddle the boundary between sandwich and burger.
In business for 81 years, **Rodilla** is the 'senior' among the big players. What began as a family-run patisserie, has been part of brewery group Damm since 2006. If formerly the savoury range was dominated almost exclusively by three-cornered, cold white-bread sandwiches, the units have now developed into genuine sandwich bars, where crusty bread-based snacks are gaining ground, too.
Of the 160 outlets, the great majority are in Madrid and its environs – 74 on the high street, 61 in shopping centres, 25 in the travel and business segment. Sales revenues for 2019 are estimated at just under €100 m. Some of this comes from bestseller, 'cold ensaladilla sandwich', which, according to the company, is "Madrid's most famous sandwich – made with tender Rodilla artisan white sandwich bread and a soft tuna spread, artichokes, boiled eggs, peas and red pepper." Over 5 m units of this recipe developed in the 1950s are sold every

The chicken wrap is part of Sandwichez' cold sandwich offer.

La Bikineria has revived the 'bikini' - a Barcelonese sandwich specialty

year. Along with 15 cold 'bocadillos', the menu features two hot versions, all of which can be ordered for collection in the restaurant or via delivery (Rodillo works with Glovo and Uber Eats).
Another popular creation is the one made of sandwich bread with poppy seeds topped with mayonnaisebased spread, bacon and diced marinated grilled curry chicken. Or the hot snack with BBQ chicken premium. In price the cold classics come at €1.70-1.80 and the hot ones at €4.75. Regular promotions attract a desire for more. Since the outbreak of the pandemic, the products, otherwise handed out unpackaged, are now packaged. "In a 100% biodegradable triangular packaging," stresses the company.

In contrast to Rodilla, **Establiments Viena** is still family-run. The brand initially focused on locations in medium-sized cities around Barcelona and only opened five units in the Catalan metropolis in 2019, which also set new standards conceptually: more focus on fast, casual and healthy – plus a broader product range, conceived in the central kitchen and largely produced there. Of the 60 restaurants, 44 are on the high street and 16 in shopping centres; only gradually is the geographical radius being enlarged to Valencia or Andorra.
Sales revenues in 2019 stood at around €90 m. The range of dishes is broad; 'flautas' – long filled bread sticks, with names such as 'Stroganov' or 'Cevapcici', plus Provençal 'cocas', 'croques' or dark rolls with chicken, spicy piri-piri sauce or guacamole as filling. Or 'Prinz', with home-made frankfurter sausages, crispy bacon, Emmental cheese, roasted onions and mustard sauce. More in the character of a dessert is 'Cork Chok', made of toast with Nutella, briefly heated. On the website you will find information on where the ingredients come from, the history of the recipes, travel recommendations and more. Viena also offers catering.

"The new generation of sandwiches is sexy. The challenge is to follow the aesthetic promise with a tasty one."

Pans & Co, part of the Eat Out Group (since 2016 part of Ibersol of Portugal), has been in the food-service business for 30 years. The brand has 170 outlets in Spain, Portugal, Morocco, and Italy and accounts for annual sales revenues of around €100m. The menu combines twelve varieties of long bread snacks – with crystal bread, "pan Provençal" or seed bread. Along with meat-based fillings such as pulled pork BBQ, crispy chicken and bacon or salmon guacamole, you will also find two vegan options and a vegetarian one. Campaigns serve as attention grabbers. For example, "Pans Experience": bread with different fillings on each half, or "Bocadillos de Vertigo": sourdough bread with grilled chicken, parmesan and lamb's lettuce or with spare ribs and chimichurri sauce. Last Christmas, Pans & Co. launched their "Bocadillos Entrelazados": hand-plaited loafs with seeds, the dough having to ferment for four hours and made partly of old grain types. The selection featured "entrelazado pastrami Cheddar" with grilled onions, and "entrelazado pollo tartufata" with grilled chicken, truffle sauce, mushrooms and Brie. Nevertheless, the bestsellers remain those with Iberian ham or tuna. Delivery is offered via the firm's own app.
Beyond the big players, those interested should notice these: Viena Capellanes, (19 outlets plus 56 corner units, €28 m), König (seven outlets in Girona, €25 m) or Buenas Migas (16 outlets, €9 m). In short, sandwiches, given the variety of bread types and fillings, can be handled in a many-sided and flexible way. *Mario Cañizal Villarino & Katrin Schendekehl*

© Pita Bar by Night Kitchen

Pita Bar by Night Kitchen stuffs pita bread with loads of fresh and healthy goodness.

THE NETHERLANDS

The Dutch and their broodjes (sandwiches) are inseparable: across almost every office and home in the Netherlands, when the clock hits midday, everyone from students and white-collar workers to manual labourers reaches for their trusty sandwich. In most cases, this means two pieces of white or brown bread and a couple of slices of Gouda cheese. In the past few years, however, there's been a growing demand for something different. Still essentially a stuffed bread concept, but with far more innovative fillings and formats than the traditional sandwiches so beloved to the nation. From crusty Surinamese rolls to American bagels, and from Israeli pitas to gourmet toasties, the Netherlands is in the throes of a sandwich revolution.

Due of the colonial and immigrant history between Surinam and the Netherlands, Surinamese cuisine is well represented across the country. And anyone seeking a spicy lunchtime sandwich should look no further than their local Surinamese toko for a counter-full of fillings. At takeaway shops like De Tokoman (with two locations in Amsterdam) or Tjin's Exotische Broodjes (in de Pijp neighbourhood in Amsterdam), you can find crusty bread rolls filled with dozens of different delights.

Particularly popular are the broodje pom (filled with spiced chicken and pomtayer – the edible root of the tayer plant) and broodje bakkeljauw (filled with a preparation of salt cod). A single roll costs around €3.50 or €4, so it's a very affordable meal and many customers order two at a time. Another popular option is a bara – a type of deep-fried dough – stuffed with curried chicken; slightly more expensive than the sandwiches but definitely in the same category. And because most Surinamese food has always been sold-to-go, these businesses have been relatively less affected by the coronavirus crisis: offering both takeaway and delivery of their sandwiches in simple paper bags.

The Dutch have always been very fond of their toasties – a humble ham and cheese tosti being a staple on café menus for many years. But in 2015, **Happy Tosti** began to revolutionise the toastie business. Co-owner Jasper Kool had been grilling sandwiches with cheese and sausage or ham since he was an 11-year old boy. But it wasn't until he opened his first branch in The Hague that his gourmet toasties took off. Now, five years later, Happy Tosti has seven locations across the country – including Amsterdam, Leiden and Breda. The classic ham and cheese toastie is still a best-seller, but customers also come back for the "tosti tasting" board: three toasties (spicy chorizo and Gruyere, Tex-Mex chicken and peppers, and ham and cheese) with three sauces (sweet chilli, mustard mayo, and truffle mayo). Plus, they serve panini with a range of vegetarian, fish and meat fillings. Individual toasties are between €5 and €8, while the tasting selection is €18.50, and most customers spend an average of €9.50. It's possible to both eat in and order takeaway via online delivery services like UberEats, Deliveroo and Thuisbezorgd – toasties and panini are delivered in cardboard salad bowls for easy recycling.

What really makes Happy Tosti stand out, however, is their social mission: to employ as many people with an occupational disability as possible, thus promoting sustainable social progress.

While the toastie may be typically Dutch, Amsterdam is an extremely international city, with citizens from over 170 countries calling it home. So it's no surprise that more recent immigrants have brought their sandwich traditions to the capital as well. One such enterprise is **Flo's Appetizing** – the first real-deal New York bagel company in town. Its American founders started as a pop-up in 2018 but opened a permanent location in the Oud-West neighbourhood in 2019. "We make our bagels in the shop, as well as a range of in-house meats and cream cheeses," says manager Zoe Brownstone. "Our scallion chive cream cheese is a salty flavoured schmear that's really popular, especially with smoked salmon." But recently, hot sandwiches like the Newman (a take on the Reuben) have taken off.

"Our North American-style sandwiches are a big draw for both expats and locals, bringing a comforting flavour that satisfies all taste profiles," says Zoe. Sandwiches range from €4 to €9, with the average bill being around €12 to €15 for two with a coffee from local roasters Lot61. Since 60% of Flo's business comes from takeaway (plus 5% from delivery), packaging is important: all sandwiches are wrapped in greaseproof paper and cut in half for manageability. Zoe concludes: "Lockdown definitely helped increase sales in the beginning as folks were hungry for something different than what they could make at home, and bagels are not easy to make at home!"

© Happy Tosti

Happy Tosti

© Flo's Appetizing

Flo's Appetizing makes its own bagels in the shop

Pita pioneers **Pita Bar by Night Kitchen** are just as international – serving up fresh, quick, healthy stuffed pitas at their location in the Oud-West neighbourhood of Amsterdam since July 2020. Co-owner Matan Achai elaborates: "Our menu consists of fresh takes on Mediterranean street food classics. Synia is a traditional, festive Levantine dish of minced meat baked with tomatoes, tahini and spices – a delicacy of the sheikhs. Or the Tel Aviv street food classic, the sabich, featuring the holy trinity of aubergine, tahini and soft-boiled egg, with an Israeli salad and our coriander green pepper sauce." Pita prices range between €7.50 and €10, with sales split equally between eat-in and takeaway/delivery customers, packaging is made from 100% biodegradable materials.

Vicky Hampton

SURVEY

ITALY

The sandwich market in Italy is highly fragmented. You can get a 'panino' everywhere: traditional bars, cafés, bakery cafés, burger bars, pastry shops, delis. Competition is therefore very high. In the last couple of decades a few brands focusing uniquely on high-quality, Italian-style panini have emerged, such as Panino Giusto and Panini Durini. Others have developed fast food concepts centered around other traditional products such as Italian-style toasted sandwiches (for instance, Capatoast) or flat breads (La Piadineria).

More recently, so-called gourmet sandwich shops have successfully emerged, with top quality fillings and recipes, freshly baked sourdough bread etc. While some entrepreneurs have made attempts at evolving the panino concept, others are trying to give regional and local specialties a national stage.

Trame' is all about the 'tramezzini' typically found in Venetian bars: small triangular sandwiches with a variety of generous fillings. The first Trame' opened in Milan in 2014, now there are five in the city and one in a shopping mall near Venice. Its menu offers 30 different fillings made from selected ingredients, which join the typically soft bread and home-made mayo to create the typically puffy smile shape. A key to its success, says co-founder Gianluca Balestra, is its flexbility: you can eat one, two, three – depending on how hungry you are. You can taste different flavours. And you can stop by for a quick snack or a whole meal. Average consumption is 2.5 to 3 sandwiches per person, with an average check of €11. Trame' charges €2.50 for most mini sandwiches, and €3 for a small selection of gourmet options. At cocktail hour the combination of tramezzini and Spritz is very popular.

During the lockdown, Trame' chose not to offer delivery, as its main delivery business came from office lunch hour and business meetings, which ground to a halt with most white-collar workers working from home. Three outlets re-opened in late May, when lockdown restrictions for restaurants were lifted. "The Trame' inside the mall has returned to pre-pandemic levels," reveals Balestra. "In Milan, we have seen a change in both customers and takings. The lunch business is still very weak, although from early September we've seen a gradual increase from Tuesday to Thursday, as people have started to go back to the office for part of the week. We have seen an increase in the evening, i.e. during cocktail hour, dinner and post dinner day parts. Besides, we have restarted our delivery services to offices and are catering for meetings again. But while we used to be able to pack, say, 40 items into a single box, we are now asked to pack individual boxes for each person." All in all, turnover is still down 40% month on month. Since mid-September all six units are operating again. Before the pandemic, Trame' had planned to open two more outlets in 2020 and four in 2021, but those plans are now on hold.

La Puccieria is one of a spate of concepts centered on the Apulian 'puccia' that has flourished in the last couple of years. A Puccia is a flat bread made from sourdough, baked in wooden ovens, sliced in half and filled with a variety of ingredients. La Puccieria, launched in Milan in December 2019, has been devised for chain development: the bread is pre-baked to a house recipe, ingredients for the filling are selected among traditional, artisanal and regional products, such as Avellino ham or AOP Campanian mozzarella. Clients can choose from the 18-item menu, the recipe of the month signed by a starred chef, and three more seasonal options. Pucce are filled to order, baked for a few more minutes and served hot. Prices vary from €6 to 9.99 depending on the filling. "I decided on a concept centered around the puccia because it is a simple trad-

© Pescaria

Pescaria serves gourmet-style sustainable fish and seafood sandwiches at competitive prices.

itional product, still relatively unknown outside Apulia and therefore there's a novelty factor," explains founder and owner Manuela Savardi. "It is soft inside but has a crunchy crust. The Puccia is lighter than the piadina as it doesn't contain lard. Besides, it can also be paired with sweet ingredients for dessert." La Puccieria didn't operate any delivery service during the lockdown. The flagship store in Milan has two seats and is now open for sit-down service, delivery and takeaway.

Pescaria is the brainchild of an Apulian fishmonger, a chef and a marketing company. They teamed up to create a fast food concept with a focus on high-quality sustainable fish sandwiches. While presented in a gourmet cuisine style, the food is offered at competitive prices, thanks to an efficient system which relies heavily on digital technologies. The first store opened in Polignano a Mare (in Apulia), followed by two stores in Milan, one in Turin and a seasonal one in Trani. In June 2020, Pescaria opened two further stores in Bologna and Rome and plans to add another two in 2021. All units are directly owned and managed.
The annual menu is complemented by seasonal ones. The best-selling sandwich is the raw tuna panino (with burrata cheese, tomato and pesto), priced €11. Other choices include sandwiches with fried octopus, salmon, prawns, swordfish or sea bream, and other raw and cooked fish dishes. Sandwiches cost between €8 and €15. Average ticket: €17.50.
Pescaria limits its menu to the food and a few select drinks – no coffee or desserts. Delivery in Turin and Milan generated on average 15% of turnover before the pandemic; during the lockdown, Pescaria reinforced their partnership with Glovo and early in June opened a dark kitchen for delivering fried fish. Also during lockdown, Pescaria launched a 'limited edition' service from their store in Polignano a Mare, a small town in Apulia: they delivered directly to 18 other towns in a 40 km radius, each driver delivering a maximum of ten orders a day. It was an immediate success, says Pescaria co-founder Domenico Iudice: in the first 24 hours delivery revenues totalled €9,000 – and €37,000 in the first week.
Thanks to delivery, during lockdown Peacaria's various shops were still able to achieve between 22 and 30% of total pre-pandemic turnover (delivery and on-site). Since reopening, delivery has declined and on-site sales have picked up. Compared to 2019, however, in September turnover is down 20% in the Milan stores and 25% in Turin.

Flavia Fresia


© La Puccieria
La Puccieria


© Pescaria
Pescaria

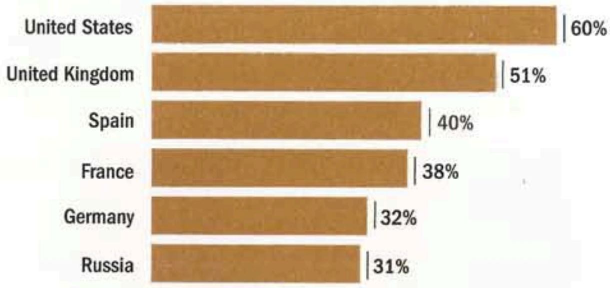

© Trame'
Trame'

Sandwich Solutions (2020)

Sandwiches

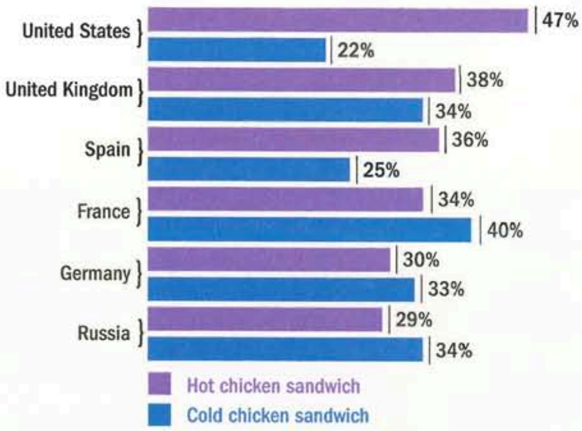
Overall purchase intent

Globally, 39% of consumers say they occasionally order a sandwich from a restaurant or foodservice venue. In Europe, consumers in the United Kingdom are much more likely to order sandwiches when dining away from home compared to diners in neighboring countries. "Consumers in the U.K. may be more apt to grab a sandwich as an on-the-go meal instead of having a more traditional breakfast or lunch than their peers in other parts of Europe," explains Aaron Jourden, Senior Research Manager – Global at Technomic. "In the U.S., sandwiches continue to be a quick and convenient meal solution for breakfast, lunch or dinner."



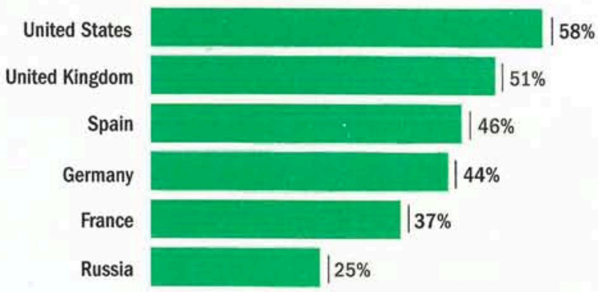
Chicken sandwiches

Chicken sandwiches are a trendy menu item around the world, with chains adding new variations at a rapid pace. Looking at this item in particular, 32% of consumers globally say they would purchase a hot chicken sandwich from a restaurant venue, while 24% say they would purchase a cold chicken sandwich. In Europe, chicken sandwiches are slightly more popular in Spain and the United Kingdom.



Vegan & vegetarian sandwiches

Nearly half (45%) of consumers globally would order a sandwich that is vegan or vegetarian. Looking at countries in Europe, diners are a bit mixed on these types of sandwiches. Aaron Jourden: "With the high popularity of sandwiches in the United Kingdom and the mainstreaming of meat-free diets buoyed by movements such as Veganuary, it's little wonder that vegan and vegetarian sandwiches would be most popular in this country."



Source: Technomic Global Navigator Q3 2019 Survey - Consumers Aged 18+ Across 25 Countries

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

2

Continuaron publicándose en la revista, los rankings de las principales empresas de restauración operando en Europa, tuvieran su sede social o no en el viejo continente, si bien para las extranjeras sólo se consideraron las ventas en territorio europeo.

Interesante disponer de la foto fija correspondiente al año 2019, como último con normalidad antes de la pandemia y que sirve como referencia para saber si los grupos de la lista, después de tres años del fin de la tragedia, han recuperado posiciones y comienzan a crecer, por encima de las del año previo al parón del 2020.

La rica descripción de datos por subsectores y países que aparecen en los reportajes seleccionados, se complementó con la importantes y esperadas presentaciones de ellos, en las sucesivas ediciones de la Summit, a cargo de Gretel Weiss.

Con la perspicacia de la que hizo gala siempre, Weiss aprovechó una util interpretación de los datos, para sacar conclusiones sobre el comportamiento de clientes, empresas e instituciones intervinientes en el mundo del foodservice, no olvidando nunca el importante papel de las empresas de contract-catering y cómo se iba conformando un nuevo sector: el travel channel (a consecuencia de que ahora no era el cliente quien seguía al restaurante, si no al revés), o cómo *food retail* y foodservice se acercaban, mientras el concepto *híbrido* de restaurante empezaba a imperar, siempre tendiendo en cuenta la evolución de un cliente cada vez más digitalizado.

Estos capítulos siempre habría que analizarlos, junto a las interesantes intervenciones de Weiss en las Summit y que se pueden encontrar en los Archive de la dfv Mediengruppre en www.food-service.de

Selección de informes anuales de los rankings TOP 100

Fecha de Aparición	Título	Contenido
2011	The Leader on the Pack	Ranking 2010
2015	Big Bigger Biggest in Europe	Ranking 2014
2018	Champions League	Ranking 2017
2020	A Record Year for Europe´s Top 99	Ranking 2019

Se presenta aquí el titulado: *"A Record Year for Europe´s Top 99"*

A Record Year for Europe's. Top 2019

TOP 99_2019

A record year for Europe's Top 99

The best results of the last decade! In 2019, Europe's Top 99 foodservice players achieved sales growth of 7.4% (in constant currency). This compares to +6.1% in 2018 and +6.6% in 2017. The leaders racked up combined sales of more than €127 bn (ex VAT). As on many previous occasions, two sectors are dominant, namely quickservice and contract catering. The greatest growth was in the QSR segment (+10.9%), mainly because of expansion, acquisitions and delivery services. You can't say it often enough: this segment is the pacemaker in our industry.

Research by Gretel Weiss and Susanne Günther (foodservice Europe & Middle East).

16/17 *foodservice* EUROPE & MIDDLE EAST 5/2020

A Record Year for Europe's. Top 2019

Europe 2019: Top 99 Foodservice Groups

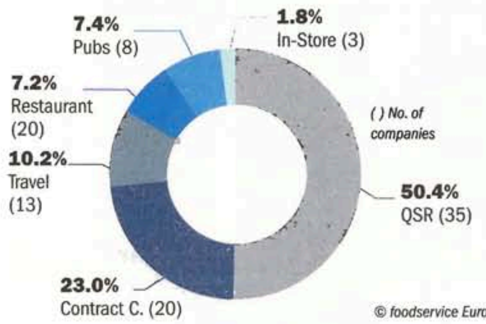
R	'18	Group	Main brands	Main sector	Sales '19 (€ m)	vs. '18 In cc	Country of origin	EC[1]	Notes cc= constant currency, LfL = Like for Like-sales/same store sales
1	1	McDonald's*	McDonald's, McCafé	QSR	26,500	8.2%	USA	39	System sales worldwide: $100.2 bn (+7% in cc/+5.9% LfL), 38,695 units (+840) in 119 countries. Europe estimated: €26.500 bn (+8.2% increase in cc), 8,600+ units: Germany 1,484, France 1,490, UK 1,320.
2	2	Sodexo	Sodexo	Contract C.	8,129	5.7%	France	29	Total sales: €21.9 bn (+7.6%, in cc +6.2%). European share of On-site Services: €8,129 m (+5.7%). Total employees: 470,000 in 67 countries. 19th largest private employer worldwide.
3	5	Yum! Brands	KFC, Pizza Hut, Taco Bell, The Habit Burger	QSR	6,826	24.4%	USA	45	Worldwide system sales: $53.299 bn (+8.2% in cc), 50,170 units (+2,046). European sales: $7.642 bn (+24.4% in cc), 6,277 units (+533) – KFC 3,549, Pizza Hut 2,574, Taco Bell 154. Top 3 countries by system sales: UK, Russia, Spain.
4	4	Compass Group	Eurest, Scolarest, Medirest, etc.	Contract C.	6,675	1.6%	UK	21	Total turnover: £25.152 bn (+10.8%), Europe: £5.854 bn (+1.6% reported/+1.6% in cc), Top 2 sectors: 53% B&I, 16% Healthcare & Co. Nearly 600,000 employees worldwide.
5	6	Burger King*	Burger King	QSR	5,740	11.0%	USA	27	Worldwide system sales: $22.921 bn (+9.3% in cc), 18,838 stores (+1,042/+5.9%). Europe estimated: €5,740 m (+11,0%), 4,950 stores (+350) estimated/100% franchise. Top growth markets: France, Russia.
6	3	Elior	L'Alsacienne, Elior, Gemeaz, Serunión etc.	Contract C.	4,923	0.8%	France	4	Sales restated to reflect the sale of Areas on July 1, 2019: €4.923 bn (+0.8%). By region: 45% France, 55% international (incl. USA & India). See Areas rank 20.
7	7	Domino's Pizza*	Domino's Pizza	QSR	2,970	8.0%	USA	28	Global: system sales $14.3 bn (+5.9%)/more than 17,000 units (+6.8%), Europe: 3,800+ units (est.). Top areas: UK/Ireland 1,184 units, sales: £1,210 m/+4.8%. France/Belgium/NL/Germany, etc. 1,118 units, €735 m/+13.0%. DP Eurasia 765 units, sales: TRY1.370 bn (+21.8 %). Spain/Alsea Iberia 300 units.
8	8	Mitchells & Butlers	Harvester, Vintage Inns, Toby Carvery, Sizzling Pubs, Alex, etc.	Pubs	2,550	3.9%	UK	2	Leading UK operator of managed pubs/pub restaurants with 1,748 outlets (+61). Total turnover: £2.237 bn (+3.9%). Adjusted operating profit: £317 m.
9	9	Starbucks*	Starbucks	QSR	2,430	8.0%	USA	28	Revenues worldwide: $26.508 bn (+7.2%)/31,256 units. Stores Europe-wide: 2,813/+5%. Top countries: UK 1,012, Turkey 509, France 183, Germany 165, Spain 150. Strategic partners: Alshaya, AmRest, Alsea, SSP, etc. 2018: first stores in Italy.
10	10	Autogrill Group	Ciao, Spizzico, Puro Gusto etc.	Travel	2,163	1.2%	Italy	17	Total group sales: €4.997 bn (+6.4%/+3.5% in cc/+3.1% LfL). North America €2.636 bn/+3.9% LfL, Europe €1.714/-0.8% in cc/+1.6% LfL (Italy €1.022 bn, Rest €692 m), HMSHost €476.6 m/+ 8.6% in cc/+4.1 LfL. 2018: aquisition of Le CroBag (Germany).
		Top 10 Total			68,906	7.8%			
11	12	SSP	Caffè Ritazza, Le Grand Comptoir, Upper Crust etc.	Travel	2,140	6.4%	UK	19	Total sales £2.794 bn (+9.0%/+7.8% in cc) in 35 countries, 2,800+ units, operating more than 550 brands. Europe: £1.877 bn (+6.4% in cc). UK/Ireland: £840.5 m (+5.3% in cc). Continental Europe: £1,037 m (+6.7% reported/+7.2% in cc).
12	14	Groupe Bertrand	Burger King, Quick, Hippopotamus, Léon de Bruxelles etc.	QSR	2,089	16.1%	France	1	Multi-concept player: total sales €2.089 bn (+16.1%)/913units (+101). BK + Quick: €1.354 bn (+11.3 %)/486 units (+27). Bars/pubs: €256 m (+19.1%)/142 units (+11).
13	13	Wetherspoon	JD Wetherspoon, Lloyds No.1, JD Wetherspoon Lodges	Pubs	2,074	7.4%	UK	1	Total turnover £1.819 bn (+7.4%), LfL-sales +6.8%, operating profit £131.9 m (-0.3%). Nearly 900 outlets throughout the UK.
14	11	Greene King*	Hungry Horse, Loch Fyne, Chef & Brewer, Flaming Grill, etc.	Pubs	2,050	0.0%	UK	1	Total revenues over £2.2 bn (divisions: pup company, pub partners, brewing & brands). Pub company with 1,700+ units: £1.8 bn estimated (+/-0). October 2019: bought by the CKA Group from Hong Kong.
15	15	Costa Coffee*	Costa Coffee	QSR	1,900	8.6%	UK	15	Worldwide 4,070 shops (UK 2,500+). Europe: 3,174 units (+251). 2018: Coca-Cola bought Costa Coffee from Whitbread for $5.1 bn - biggest acquisition of the soft drink producer in its history.

*Turnover estimated [1] Presence in European countries

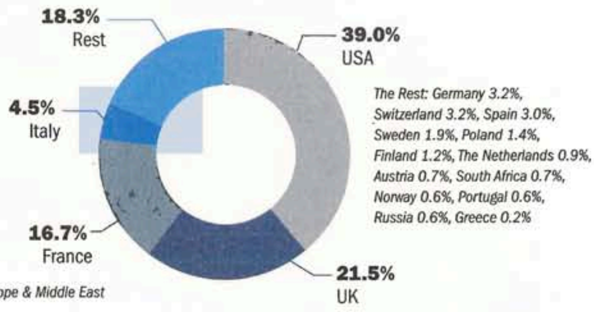
+++ We have used figures from the end of 2019 / beginning of 2020 - without adjustments for the Covid-19 crisis.
That way, the successes and overall impressions of the year will remain valid for future consideration and comparison. +++

A Record Year for Europe's. Top 2019

Turnover 2019: Top 99 by sector



2019: Country of origin



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For the top 99, 2019 proved to be a record year, with levels of turnover and growth that will not be seen again for some time to come.

Some highlights for starters:

The Top 10

Our ranking's clear number 1, McDonald's, weighs in at over €26 bn system sales and 8.2% growth (both estimated).

With combined net sales of nearly €69 bn, the Top 10 players account for more than half the turnover of all Top 99 companies.

There is movement in ranks 3 to 6. Significant amongst these are Yum! Brands, who, with almost 25% growth, climb from 5th to 3rd place, and Elior, who slipped from 3rd to 6th, after having sold off the travel catering division, Areas (sales quoted separately to reflect this - Areas rank 20). And, with Sodexo, Compass and Elior amongst them, the top 10 now include three contract caterers.

Moreover, not one player in this top group has reported a decrease in sales.

Combined, the 99 foodservice players in Europe grew at a rate of 7.4% in 2019. Their sales account for more than 20% of Europe's total market volume. This is still a small figure compared to the structure in many other product and service industries. However, market concentration is increasing.

Growth champions

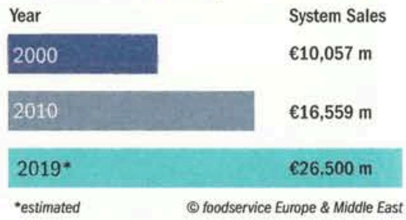
This year, the list of the fastest growing companies is headed by Alsea Iberia from Spain (rank 28) with a turnover plus of 68.4%. Alsea, Mexico's biggest restaurant company, made big investments in Europe. With Grupo Vips as their latest takeover, Alsea Iberia became the largest multi-brand player in Spain, with more than 1,000 units.

Second in line, following the takeover of Europe's fast casual pioneer, Wagamama, is the Restaurant group from the UK (rank 23) with a growth rate of 56.4%.

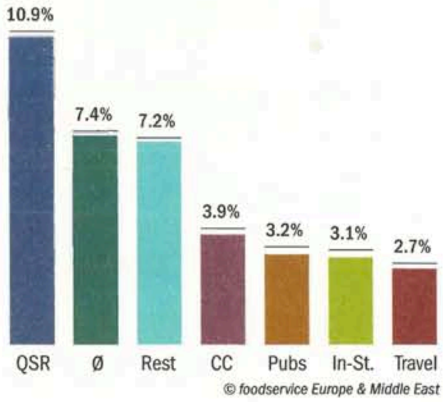
Growth star number three with 45.7% plus compared to the sales in 2018 is Dodo Pizza from Russia (rank 84) – a real delivery success story.

In all, 22 players show double-digit growth rates and only 16 names report decreasing sales. New names in the list include: Papa John's (rank 58) and O'Tacos (rank 97). Thriving economies in many countries, more money for private consumption and the increasing perception of restaurant dining as a lifestyle issue – these factors all go to create the background for strong growth in the away-from-home business.

McDonald's Europe



2019: Growth by sector



Europe 2019:
Top 10 brands by European units

R	Brand	Origin	Units Europe	Worldwide	E-Share in %
1	McDonald's*	US	8,600	38,695	22.2
2	Subway	US	5,381	40,869	13.2
3	Burger King*	US	4,950	18,838	26.3
4	Domino's Pizza*	US	3,800	17,000	22.4
5	KFC	US	3,549	24,104	14.7
6	Costa Coffee*	UK	3,174	4,070	78.0
7	McCafe*	AUS	2,893	5,500	57.9
8	Starbucks*	US	2,813	31,256	9.0
9	Pizza Hut	US	2,574	18,703	13.8
10	Greggs	UK	2,000	2,000	100.0
	Total (10)		**39,734**	**200,535**	**19.8**

*estimated

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2019: Top 10 Europe

R	Group	Sales '19 (€ m)
1	McDonald's*	26,500
2	Sodexo	8,129
3	Yum! Brands	6,826
4	Compass Group	6,675
5	Burger King*	5,740
6	Elior	4,923
7	Domino's Pizza*	2,970
8	Mitchells & Butlers	2,550
9	Starbucks*	2,430
10	Autogrill Group	2,163
	Total	**68,906**

*System sales, *estimated*

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2019: Growth stars

R	R	Group	Main Sector	Country of Origin	vs. '18 in cc
1	28	Alsea Iberia	QSR	Spain	68.4%
2	23	The Restaurant Group	Restaurants	UK	56.4%
3	84	Dodo Pizza	QSR	Russia	45.7%
4	59	Serenissima Group	Contract C.	Italy	31.3%
5	16	AmRest	QSR	Poland	26.5%
6	73	Five Guys	QSR	USA	26.1%
7	97	O'Tacos*	QSR	France	25.0%
8	3	Yum! Brands	QSR	USA	24.4%
9	84	L'Osteria	Restaurants	Germany	20.6%
10	74	Vermaat	Contract C.	The Netherlands	18.1%

*estimated

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Comparison Top EU & USA in 2019

R	Europe** (> 740 m people)	Sales '19	R	USA** (> 320 m people)	Sales '19
1	McDonald's*	€26,500 m	1	McDonald's	$40,413 m
2	Sodexo	€8,129 m	2	Starbucks Coffee	$22,282 m
3	Yum! Brands	€6,826 m	3	Chick-fil-A	$12,672 m
6	Compass Group	€6,675 m	6	Taco Bell	$11,293 m
4	Burger King*	€5,740 m	4	Burger King	$10,204 m
5	Elior	€4,923 m	5	Subway	$10,200 m
7	Domino's Pizza*	€2,970 m	7	Wendy's	$9,763 m
8	Mitchells & Butlers	€2,550 m	8	Dunkin'	$9,229 m
9	Starbucks*	€2,430 m	9	Domino's	$7,044 m
10	Autogrill Group	€2,163 m	10	Panera Bread	$5,980 m
	Total Top 10	**€68,906 m**		**Total Top 10**	**$139,080 m**
		(+7.8%)			**(+6.6%)**

*estimated **Europe = Groups, USA = Brands without contract catering

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Important notes

Our industry is organized into six segments (companies doing many different things are categorized by their main business field): QSR, full-service restaurants, contract catering, travel, pubs and in-store. Not included in the list are the F&B business in hotels, large department stores, military institutions, self-managed operations in institutional catering and players such as petrol stations.

Overlapping sales are counted twice. For example: we show the system sales for the Burger King Corporation. Besides that, some of Burger King's largest multi-brand partners are also in the list – Umoe restaurants in Norway (rank 47) is one of them. In total, the overlapping volume of all brands is probably still less than €5 bn but increasing continuously.

The figures are mainly based on annual reports and information supplied by the companies on request (2/3); estimates are marked accordingly (1/3). The ranking makes no claim to be complete – the goal is to provide an overview of the continent as a whole.

Compared to the previous year, 2019 was characterised by the following currency fluctuations: small increases for the American dollar, the British pound, the Swiss franc and the Russian ruble. For our ranking,

+++ We have used figures from the end of 2019 / beginning of 2020 - without adjustments for the Covid-19 crisis.
That way, the successes and overall impressions of the year will remain valid for future consideration and comparison. +++

A Record Year for Europe’s. Top 2019

Europe 2019: Top 99 Foodservice Groups

R	'18	Group	Main brands	Main sector	Sales '19 (€ m)	vs. '18 in cc	Country of origin	EC[1]	Notes cc= constant currency, LfL = Like for Like-sales/same store sales
16	18	AmRest	KFC, Pizza Hut, Starbucks, LaTagliatella, Sushi Shop etc.	QSR	1,842	26.5%	Poland	23	Worldwide: sales €1.961 bn, 2,337 units (+199). Europe: sales €1.842 bn (+26.5% in cc). 2,252 (+189) units. Top countries by units: Poland (559), Spain (344), France (322), Germany (282), Russia (271). 2018: takeover of Sushi Shop/France. Main shareholder FCapital Dutch.
17	16	Aramark*	Aramark	Contract C.	1,800	6.0%	USA	8	Global contract caterer with $16.227 bn sales (+2.8 % reported). Europe: €1.8 bn estimated (+6 %). Germany (€588 m/+6.3 %), UK (€483 m/ +10.0 %).
18	17	Subway	Subway	QSR	1,733	1.6%	USA	34	System sales worldwide $16.1 bn (-2.4%). 40,869 stores (-2,131). Europe: Sales €1.733 bn (+1.64%), 5,381 units (+31). Leading: UK/Ireland, Germany, France.
19	19	Ikea*	Ikea	In-Store	1,480	5.5%	Sweden	33	Total group turnover worldwide: €39.1 bn. Foodservice sales (restaurant, bistro, Sweden shop) account for more than €2.0 bn in 440 units. Europe: 286 locations (+12). Top country: Germany (€250 m/+4.4%/53 units). Strong also in USA, France and UK.
20	-	Areas	Paul, Burger King, Exki, etc.	Travel	1,394	3.0%	Spain	8	Total group turnover: €1,913 m (+4%). 1,928 units, number 3 in travel catering. Europe: €1,394 m (+3%), 1,527 units. Top countries: France, Spain, Italy. Former part of Elior Group, today owned by the French Private Equity-Fond PAI Partners.
21	22	Greggs	Greggs	QSR	1,332	13.5%	UK	1	Europe’s largest bakery chain. Turnover: £1,168 m (+13.5%), LfL-sales +9.2%, operating profit before tax £114.2 m (+27.2%). 2,000+ outlets. Specialised in sandwiches.
22	20	Gategroup*	Gate Gourmet, Gate Retail Onboard, Servair etc.	Travel	1,303	-4.0%	Switzerland	16	Total turnover worldwide: CHF4.962 bn (+0.5%). Europe: catering and retail on board CHF1,450 m (-4%) estimated. 2019: the Chinese HNA Group sold the Swiss airline caterer to RRJ Capital (Hong Kong). 2020: decision to acquire LSG Group’s European Business.
23	32	The Restaurant Group	Chiquito, Coast to Coast, Frankie & Benny’s, Wagamama etc.	Restaurants	1,223	56.4%	UK	15	Revenues: £1,073 m (+56.4%/aquisition of Wagamama), LfL sales +2.7%. Approx. 650 restaurants/pubs. Wagamama Europe: £412 m (+12.6%). TRG profit before tax: £74.5 m.
24	21	LSG Sky Chefs	LSG Sky Chefs	Travel	1,222	1.7%	Germany	13	Leading player in airline catering. €3.360 bn total sales (+4.4% reported). 205 flight kitchens worldwide. Europe: €1.222 bn (36.4% of total). 2020: European business sold to Gategroup.
25	23	WSH*	Baxter Storey, Caterlink, Benugo, etc.	Contract C.	1,083	5.5%	UK	6	Sales: £950 m/+5.5% estimated (UK: £877 m/+5.2%). 2019: a significant stake of WSH, UK’s largest independent contract caterer, got sold to Clayton Dubilier & Rice (US private equity firm). Baxter Storey (B&I) accounts for 50+ % of WSH’s revenue.
26	25	Pret A Manger	Pret A Manger, Veggie Pret, EAT	QSR	978	8.3%	UK	7	Total sales: £1,097 m (+8%), 627 units (+82). Europe: £858 m (+8.3% in cc) – 499 units (+76). Top 3 countries: UK, France, Spain. 2018: JAB aquired Pret from Bridgepoint. 2019: Pret buys EAT.
27	26	Stonegate Pub Company	Slug and Lettuce, Yate’s etc.	Pubs	972	10.1%	UK	1	UK’s largest privately owned managed pub company. 763 sites (+38). Sales: £852.79 m revenue (+10.1%/52 weeks). A wide variety of formats.
28	44	Alsea Iberia	Foster’s Hollywood, Domino’s Pizza, Starbucks, Vips, Burger King, etc.	QSR	960	68.4%	Spain	6	Largest multi-brand player in Spain with 1,000+ units (300 Domino’s Pizza, 229 Foster’s Hollywood, 147 Starbucks). 2018/19: Alsea (Mexico’s biggest restaurant company) acquired Groupo Vips with 400+ units (Vips, Ginos, Starbucks, etc). So both former player, Zena and Vips now operated as Alsea Iberia.
29	24	Nando’s*	Nando’s	Restaurants	940	6.0%	South Africa	2	Global brand (Piri piri chicken). Worldwide more than £1 bn sales. Europe: sales 2019 estimated £825 m (+6,0%)/440 units (+20). Sales 2018 £779 m (+7.9%)/422 sites (+31). Very strong in UK.
30	27	Newrest	Newrest	Travel	936	7.3%	France	12	Total sales: €2.001 bn (+6.8%), in 58 countries. European share: €935.5 m (+7.3%). Inflight business is dominating. France: €524.3 m (+7.6%). 11 European Countries without France: €411.2 m (+6.5%).

*Turnover estimated [1] Presence in European countries

which is based on euros, this means that, even with the same turnover, companies in these countries reached a higher position in 2019 than in the 2018 list. Other currencies fell against the euro. (*www.oanda.com*)
To make our list as transparent as possible, growth rates reported by the companies based outside of the eurozone are shown in constant-currency terms. Otherwise, they would tend to reflect the ups and downs of the money markets, rather than the actual operating performance of the companies, which we are seeking to present.

Quickservice

36 names out of the top 99 fall into this category. The majority are based in the USA, France, the UK and Spain. With a turnover of €64.1 bn, they represent 50.4% of the top 99's total sales and cover the full range from pizza delivery and hamburger stores to coffee bars and noodle shops – including fast casual (with exceptions). Just as in most of the previous years, quickservice was, with +10.9% (2018: +8.7%), the fastest-growing segment in 2019.
Yes, this category is more powerful than any other market segment. It has the most new openings, is the the most innovative and industrialized, has the most chains – and, typically, makes the most profit. This segment is where today's booming businesses - to-go and delivery - are at home. Alongside eating on the premises, they represent two highly relevant channels for the future.
Fast-casual concepts are the main driver of the segment – and have been for more than a whole decade. And it is their influence that is pushing the more established companies (more premium, more freshness, more in-

2019: Top 99 by country*

Country	Sales '19 (€ m)
USA	49,720
UK	27,408
France	21,227
Italy	5,722
Switzerland	4,106
Germany	4,020
Spain	3,880
Sweden	2,359
Poland	1,842
Finland	1,543
Netherlands	1,113
South Africa	940
Austria	935
Norway	794
Portugal	737
Russia	735
Greece	300
Total	**127,381**

*Country of origin

© foodservice Europe & Middle East

+++ We have used figures from the end of 2019 / beginning of 2020 - without adjustments for the Covid-19 crisis. That way, the successes and overall impressions of the year will remain valid for future consideration and comparison. +++

A Record Year for Europe's. Top 2019

Europe 2019: Top 99 Foodservice Groups

R	'18	Group	Main brands	Main sector	Sales '19 (€ m)	vs. '18 in cc	Country of origin	EC[1]	Notes cc= constant currency, LfL = Like for Like-sales/same store sales
31	29	Do & Co	Do & Co International, Demel, Henry, etc.	Travel	935	10.3%	Austria	9	Gourmet entertainment company. Turnover: €935.3 m (+10.3% reported). Airline catering €670.3 m, int. event catering €134.1 m, restaurants and co. €130.9 m. Figures include sales outside of Europe.
32	28	Marston's	Pitcher & Piano, Bostin Locals, Taverner's Carveries, etc.	Pubs	894	2.9%	UK	1	Total group sales: £1.173 bn (+3%). Sales of restaurants & pubs: £784.2 m (+2.9%), there of destination and premium £460.1 m (+2.1%), taverns £324.1 m (+3.9%).
33	31	Le Duff	Brioche Dorée, Del Arte, Kamps, etc.	QSR	800	2.6%	France	9	Group sales worldwide (food & foodservice): €2.05 bn. Europe: 1,200+ units (Pizza-Pasta: 216, Bakery Cafes: 615 worldwide, Kamps 430.
34	34	SV Group*	SV Business, SV Care, SV Event, SV Hotel	Contract C.	755	1.2%	Switzer-land	3	A Swiss institution with 616 units (+22): CH 325 (+4), DE 158 (+20) and AT 133 (-2). Total group sales CHF840 m estimated (+1.2%): Home market CHF516.0 m. More than 41 m meals and 8,400+ employees (+2.0 %).
35	33	Camst Group	Tavolamica, Camst, Dettagli, Gustavo Italiano, etc.	Contract C.	723	0.0%	Italy	4	Mainly contract catering. 2,000+ units, 16,000 employees. Top 3 countries: Italy, Spain, Germany.
36	41	Groupe API	api, rdr, lys, NEOR	Contract C.	716	13.3%	France	2	Largest French family business in contract catering. 9,500 employees, 850,000 meals per day, active in all segments. Also in Belgium.
37	40	Tank & Rast*	Waynes, Brotzeit, Gusticus, Coffee Fellows, Segafredo, etc.	Travel	700	9.0%	Germa-ny	6	410+ service stations at German motorways (multi-brand player): sales €650 m estimated (+1.2%). 2018 aquisition of Wayne's Coffee/Sweden (first time included): 115 units in 6 countries. Allianz Capital Partners (ACP) as main investor.
38	30	Agapes*	Flunch, Pizza Pai, Amarine, etc.	Restau-rants	690	-2.0%	France	3	Multi-brand player with nearly 400 units (decrease). Main brands: Flunch with 239 units, Pizza Pai, 3 Brasseurs, Sogood. Also in Brazil and Canada. New data base.
39	37	Lagardère Travel Retail	So! Coffee, Bread & Co., Relais H Café, etc.	Travel	689	4.5%	France	23	Total sales worldwide: €5.5 bn (+12.8%); foodservice: multi-brand player with many different formats. Europe: 3,352 units (+23). Top 3 countries: France, Italy, Poland.
40	36	CIR Food	Rita, Chiccotosto, Let's Toast, Aromatica, etc.	Contract C.	686	3.3%	Italy	3	Cooperativa Italiana di Ristorazione. Main services: schools, care & military. 13,000 employees. 140 locations (+/-0). Countries: Italy, Belgium, Netherlands.
41	35	S-Group	Amarillo, Rosso, etc.	Restau-rants	671	2.2%	Finland	3	S-Group's total sales €11.7 bn (+1.7%). Tourism and hospitality trade. 650 (+10) restaurants, bars, cafés (incl. ABC stations). Also Sokos Hotels.
42	38	Whitbread	Beefeater, Brewer's Fayre, etc.	Restau-rants	667	1.3%	UK	2	Total revenues: £2,072 m (+1.1%). Pub restaurants in Premier Inn £585 m (+1.3%). 2018: Whitebread sold Costa Coffee to Coca-Cola.
43	42	Cremonini	Chef Express, Roadhouse Grill, etc.	Travel	662	5.8%	Italy	7	Total revenues €4.437 bn (+6.0%). Catering activities (14% of total sales) in different areas: on-board trains (17%), railway station buffets & motorway service areas (54%), steakhouse business (29%).
44	45	Pellegrini	Pellegrini	Contract C.	600	8.7%	Italy	2	Foodservice: 600 units, 40 m meals per year. Established in 1965. Also activities in Africa.
45	43	Fazer	Food Services (Amica, Wilberg, etc.)	Contract C.	597	0.6%	Finland	4	Fazer Group total sales in continuing operations €1.097 bn (+6.6%). Foodservices: 1,000+ units, sales €597.3 m (+0.6%). January 2020: Fazer Food Service sold to Compass Group.
46	39	Migros	Migros, Molino, cha chá, Chicke-ria, etc.	In-Store	568	-1.6%	Switzer-land	1	Total group turnover: CHF28.683 bn (+0.8%). Switzerland's biggest national restaurant player (self-service, Gourmessa/take-away), 333 units (-4). Foodservice turnover: CHF631.9 m (-1.6%). New data base.
47	46	Umoe Restaurants	Burger King, Peppes Pizza, LaBa-guette, Starbucks, Leon, etc.	QSR	555	3.3%	Norway	3	Biggest foodservice player in Norway. System sales: NOK5.466 bn (+3.3%) / 475 units (+26). Master franchisee for Burger King (nearly 300 units). 2018: new licences for Leon and Eataly.
48	53	Van der Valk*	Van der Valk	Restau-rants	525	11.7%	Nether-lands	5	Netherland's strongest brand and largest hospitality company (besides McD), privately owned. Strong expansion/renovation. Sales nearly €800 m, about 2/3 is foodservice related. Approx. 110 hotel locations in Europe (73 NL).

*Turnover estimated [1] Presence in European countries

A Record Year for Europe's. Top 2019

dividual – less standardised).
Of 36 companies, only four reported declining sales. But there are 13 with a double-digit increase in turnover.
A few words about McDonald's with 8.2% sales increase in constant currency (estimated). For them, it has been another year with top figures in the UK, but also with very strong growth in markets like Italy, Poland and Russia. To recap: system sales for McDonald's Europe in 2000 stood at €10.057 bn; in 2010 at €16.559 bn and now, in 2019, at an estimated €26.500 bn. It is not the first time in its history that McDonald's has emerged from a difficult period, stronger than ever before.
A large-scale evolution has been in process for half a decade or more: a new production system, more and better premium products, massive investment in digital communication and new service solutions. One of the main goals is to establish table service as standard in all restaurants – something that was completely unthinkable just a few years ago! Whilst it means higher costs and greater effort for the system, it results in more convenience and a better brand experience for the customer, as well as higher sales for the franchisees.
The goal is to change the public perception of the giant.

Contract catering
This sector is represented by 20 companies in this year's listing. Their combined sales reached a very creditable €29.3 bn in 2019, an increase of 3.9% (2018: also +3.9%).
The four largest contract caterers (Sodexo, Compass, Elior and Aramark) operate in many countries across Europe – and indeed across the globe. Most others in the list have regional networks, which means they operate in one to five countries. Best, in terms of relative growth, are the Serenissima Group from Italy, with +31.3%, followed by Vermaat from the Netherlands (+ 18.1%) and Group API from France (+13.3%). There is no name in the whole group with declining numbers.
Contract catering means captive markets, large operations and cost-driven management. It is a very com-

2019: Top 5 by country of origin

Country	R	Group	Sales '19 (€ m)	vs. '18 in cc
USA	1	McDonald's*	26,500	8.2%
	3	Yum! Brands	6,826	24.4%
	5	Burger King*	5,740	11.0%
	7	Domino's Pizza*	2,970	8.0%
	9	Starbucks*	2,430	8.0%
		Top 5 total	**44,466**	**10.7%**
France	2	Sodexo	8,129	5.7%
	6	Elior	4,923	0.8%
	12	Groupe Bertrand	2,089	16.1%
	30	Newrest	936	7.5%
	33	Le Duff	800	2.6%
		Top 5 total	**16,877**	**5.3%**
UK	4	Compass Group	6,675	1.6%
	8	Mitchells & Butlers	2,550	3.9%
	11	SSP	2,140	6.4%
	13	Wetherspoon	2,074	7.4%
	14	Greene King*	2,050	0.0%
		Top 5 total	**15,489**	**3.1%**
Italy	10	Autogrill Group	2,163	1.2%
	35	Camst Group	723	0.0%
	40	CIR Food	686	3.3%
	43	Cremonini	662	5.8%
	44	Pellegrini	600	8.7%
		Top 5 total	**4,834**	**2.8%**
Spain	20	Areas	1,394	3.0%
	28	Alsea Iberia	960	68.4%
	50	Telepizza*	515	5.0%
	64	Grupo Restalia	350	0.0%
	87	Ausolan	254	10.4%
		Top 5 total	**3,473**	**16.0%**
Switzerland	22	Gategroup*	1,303	-4.0%
	34	SV Group*	755	1.2%
	46	Migros	568	-1.6%
	61	Valora	395	3.2%
	70	Coop Suisse	322	0.7%
		Top 5 total	**3,343**	**-1.2%**
Germany	24	LSG Sky Chefs	1,222	1.7%
	37	Tank & Rast*	700	9.0%
	54	Vapiano*	485	2.8%
	69	Nordsee	329	-1.6%
	72	Apetito	306	7.5%
		Top 5 total	**3,042**	**3.7%**
Sweden	19	Ikea*	1,480	5.5%
	63	Max	362	11.1%
	76	Espresso House	298	12.5%
	95	O'Learys	219	-2.2%
		Top 4 total	**2,359**	**6.4%**
Finland	41	S-Group	671	2.2%
	45	Fazer	597	0.6%
	80	Hesburger	275	5.8%
		Top 3 total	**1,543**	**2.2%**
Netherlands	48	Van der Valk*	525	11.7%
	74	Vermaat	300	18.1%
	78	NS Stations Retail	288	-23.2%
		Top 3 total	**1,113**	**1.3%**

*estimated

Source foodservice Europe & Middle East

+++ We have used figures from the end of 2019 / beginning of 2020 - without adjustments for the Covid-19 crisis. That way, the successes and overall impressions of the year will remain valid for future consideration and comparison. +++

A Record Year for Europe’s. Top 2019

Europe 2019: Top 99 Foodservice Groups

R	'18	Group	Main brands	Main sector	Sales '19 (€ m)	vs. '18 in cc	Country of origin	EC[1]	Notes cc= constant currency, LfL = Like for Like-sales/same store sales
49	48	Buffalo Grill*	Buffalo Grill	Restaurants	520	0.0%	France	3	Total sales: €520 m, 360+ units. France sales: €506 m (+0.6%), 355 units. Mostly company owned. 30+ m guests. 2018: acquired by TDR Capital.
50	50	Telepizza*	Telepizza, Pizza Hut, Apache Pizza, Pizza Blitz, Forty's Pizza	QSR	515	5.0%	Spain	9	Global sales €1.253 bn (+4.5%). In total 1,400+ Telepizza units and 1,100+ Pizza Hut outlets (master licensee for Latin America & Spain). Europe: 1,000+ units with different pizza brands. In 2019 delisting stocks. 2020 new company name: Food Delivery Brands (KKR).
		Top 50 Total			111,825	7.9%			
51	47	Holder	Paul	QSR	513	7.1%	France	21	Sales worldwide: €796 m (+7%), 765 (+27) Paul shops in about 40 countries. Europe: 566 units (+14). Top 3 countries: France, UK, Belgium. Family business for 125+ years.
52	49	PizzaExpress*	PizzaExpress	Restaurants	500	-0.2%	UK	2	Global sales: £550 m estimated (+1.2%). Over 600 units (>100 in Asia). UK & Ireland: £440 m estimated/flat. Owned by Hony Capital (China) since 2014.
53	54	Marie Blachére*	Marie Blachére	QSR	490	9.5%	France	1	Boulangeries, Tarteries, Sandwicherias: 535 units (+50). Concept created in 2004, part of Groupe Blachére.
54	52	Vapiano*	Vapiano	QSR	485	2.8%	Germany	19	Worldwide: system sales €550 m estimated (+2.8%), 236 restaurants (+5) in 33 countries. Europe: 188 units (+3). Germany 82, France 27, Austria 18 and Netherlands 11. IPO in 2017, insolvency in 2020 (Covid-19). New ownership.
55	51	Cigierre*	Old Wild West, Wiener Haus, Shi's, Pizzikotto, etc.	Restaurants	480	-0.4%	Italy	6	In Italy market leader in casual dining. 350+ restaurants in Europe. 25+ m meals. Majoritarian owned by BC Partners (private equity).
56	55	Ibersol	Pizza Hut, Pans, Pizza Movil, Burger King, Coffee Shops, etc.	QSR	472	9.3%	Portugal	2	Multi-brand player. Turnover incl. Angola: €485 m (2018: €450 m), Portugal: €261 m, Spain: €211 m. Totaly 537 units in Europe.
57	56	Caffè Nero	Caffè Nero, Coffee#1, Harris & Hoole etc.	QSR	463	10.9%	UK	7	System sales: £406 m (+10.9%). 1,026 (+143/+16.2%) Italian-style coffee bars. Caffè Nero 849, Coffee#1 101 (acquistion 2019), Harris & Hoole 40. First stores in Sweden.
58	-	Papa John's*	Papa John's	QSR	450	7.0%	USA	12	Worldwide 5,395 pizza restaurants in 49 countries. Operating in Europe 931 units (+49): UK 446, Russia 197, Ireland 80.
59	85	Serenissima Group	Serenissima Ristorante, etc.	Contract C.	408	31.3%	Italy	3	Contract Caterer, strong in healthcare, public welfare, school & education. Centralised production system. More than 600 contracts (+120). Countries: Italy, Spain and Poland.
60	58	TGI Friday's*	TGI Friday's	Restaurants	400	0.0%	USA	17	Total sales worldwide nearly $2 bn with 800+ units (USA: sales $1,068 m/-13.1%, 385 units/-33). Europe: €400 m (+/-0) estimated, 160+ units. Top 3 markets: UK, Spain, Norway.
61	64	Valora	BackWerk, Ditsch, Brezelkönig, Caffe Spettacolo, SuperGuud	QSR	395	3.2%	Switzerland	4	Total revenue: CHF2,681 m (-1.8%). Division Food Service: sales CHF440 m (+3.2%), 651 units (352 BackWerk, 200 Ditsch: both German brands). Most sites at train stations.
62	60	Casual Dining Group*	Café Rouge, Bella Italia, Las Iguanas, Belgo	Restaurants	365	-2.2%	UK	1	Sales £320 m estimated (-2.2%) for four brands, together about 280 units. Latest: takeover by Epiris (private equity firm UK). July 2020: closing of 90+ restaurants/into administration).
63	65	Max	Max Burgers	QSR	362	11.1%	Sweden	4	Total sales SEK3.847 bn (+11.2%), 153 units. Europe: SEK3.839 bn (+11.1%), 146 units (+12). Family owned premium burger business. In 2018 50th anniversary.
64	61	Grupo Restalia	100 Montaditos, La Surena, TGB - The Good Burger, Pepe Taco, etc.	QSR	350	0.0%	Spain	4	3 fast-casual formats: beer-driven, affordable & ambitious: 650 units worldwide (105 abroad) - 100 M (350), LS (96) and TGB (160) - all franchising. New brands in 2019.
64	63	Hard Rock International (HRI)*	Hard Rock Café	Restaurants	350	0.0%	USA	28	Hard Rock International (HRI): 75 countries with 190 cafés, 30 hotels & 11 casinos. Europe: 55+ cafés (30+ franchise, 20+ company owned). One of the most globally recognised brands.
66	67	Fuller, Smith & Turner	Ale & Pie, English Inns, City Pubs, etc.	Pubs	342	2.0%	UK	1	Total revenues: £333 m (+3.0%). Transformational year: sale of Fuller's Beer Business. More than 200 managed pubs and hotels: sales £299.6 m (+2%).

*Turnover estimated [1] Presence in European countries

petitive business, not at consumer level but at contract level. Non-traditional markets like sports arenas and event catering are breathing new life into the segment. There are hardly any players left, who just operate canteens or hospital kitchens.
Compared with the U.S., canteens are so much more important in Europe, especially in countries like Switzerland and Sweden. They are an important factor of employer branding.

Travel
This segment covers service stations, railway station and on-board catering, as well as airport and airline catering. Travel operators are represented by 13 companies with combined foodservice sales of €12.9 bn, an increase of 2.3% (2018: +5.3%). There is just one company with double-digit sales growth: Do & Co +10.3%. Three player have declining numbers.

Areas, (formerly part of French Elior Group and now based in Spain), is the new kid on this block. In contrast, NS Stations Retail from the Netherlands stand out because of a major downsizing of their foodservice business (-23.2%).
Typical for the whole travel hubs category is high customer footfall. These locations are real hotspots in mobile societies (or 'were' - until the shutdown/Covid-19 pandemic). In this segment, breakfast offers are of greater importance to consumers than anywhere else. Moreover, travel hubs are an outstanding example of the shift from local operators to national and multi-national players with a large number of brands in their portfolio.

Restaurants
Nineteen names fall into the full-service restaurant category. Total turno-

Rules: Top 99

- Where possible, figures as reported; estimates shown with asterisk*
- System sales/turnover based on company performance and business in European markets including franchise activities, excluding sales taxes (VAT)
- Growth rates are shown in constant currency
- Foodservice includes food and beverages only; accommodation, retail etc. is excluded
- Ranked by corporations, not brands
- Categorised by main business field
- Conversion to euros, where necessary at average 2019 exchange rates
- UK-pubs: managed estates only
- Franchised and other overlapping activities are double counted

+++ We have used figures from the end of 2019 / beginning of 2020 - without adjustments for the Covid-19 crisis. That way, the successes and overall impressions of the year will remain valid for future consideration and comparison. +++

A Record Year for Europe's. Top 2019

Europe 2019: Top 99 Foodservice Groups

R	'18	Group	Main brands	Main sector	Sales '19 (€ m)	vs. '18 in cc	Country of origin	EC[1]	Notes cc= constant currency, LfL = Like for Like-sales/same store sales
67	69	Azzurri Group	Ask, Zizzi, Coco di Mama, etc.	Restaurants	341	7.0%	UK	2	Sales: £299.4 m (+7.0%). 298 units (+8): 162 Zizzi, 111 Ask, etc. Over 6,000 employees, 20 m meals annually.
67	68	Young's	Young's, Geronimo	Pubs	341	3.1%	UK	1	Total revenue: £311.6 m (+2.6%). 207 managed sites with £299.1 m sales (+3.1%). LfL-sales -2.4%. Adjusted operating profit: £44.8 m.
69	66	Nordsee	Nordsee	QSR	329	-1.6%	Germany	8	Europe's leading fish/seafood chain, started in 1965. 373 units (-5). Germany (strong in shopping malls): €267.7 m (-4.1 %), 314 units (-4). 2018 acquired by Kharis Capital.
70	70	Coop Suisse	Coop Foodservice, Marché travel CH	In-Store	322	0.7%	Switzerland	1	Total group sales: CHF30.669 bn. Restaurant turnover CHF358 m/+0.7% (Coop Foodservice CHF245 m, Marché travel CHF113 m), 240 units (+6) with nearly 2,250 employees in foodservice (converted to full-time).
71	71	Eldora	Eldora	Contract C.	316	1.5%	Switzerland	1	Sales CHF351.7 m (+1.5%). More than 290 contracts mainly B&I but also schools and care. More than 15 m meals and drinks, over 2,200 employees.
72	75	Apetito	Apetito	Contract C.	306	7.5%	Germany	1	Total sales of Apetito Group: €1,035 m (+17.4%). German pioneer for meals on wheels. Contract-catering share: 30%. 617 contracts. More than 7,000 employees.
73	87	Five Guys	Five Guys	QSR	301	26.1%	USA	4	US system sales: $1.661 bn (+7.4%) 1,368 units. Europe: sales £264 m (+26% in cc) 143 units (+26). 4 markets: UK (£173.2 m), France (£42.5 m), Spain (£30.8 m) and Germany (£18.0 m).
74	83	Vermaat	Vermaat	Contract C.	300	18.1%	Netherlands	1	Catering services to high-end markets. Most prominent clients are museums. 400 locations. In December 2019 Swiss Partners Group sold Vermaat to British Bridgepoint.
74	74	Vivartia Group	Goody's, Everest, Flocafe, La Pasteria, etc	QSR	300	3.1%	Greece	13	No. 1 foodservice company in Greece. 567 (+/-0) units with different brands, 6,000 employees. Top 3 markets: Greece, Hungary, Cyprus.
76	77	Espresso House	Espresso House, Balzac Coffee	QSR	298	12.5%	Sweden	5	Group sales: SEK3.158 bn (+12.5% in cc). 463 units (+30). Top 3 countries: Sweden, Norway, Denmark. Since 2015 owned by JAB Holding Company.
77	73	Welcome Break*	Starbucks, KFC, Papa John's, Harry Ramsdens, Tossed, etc.	Travel	296	0.0%	UK	1	Catering and retail sales £260 m estimated (+/-0). Operating 24 motorway service areas plus adjusted hotels/nearly 300 sales points. Mainly partnerships with national and international concepts. New major shareholder: Applegreen (Ireland).
78	59	NS Stations Retail	Broodzaak, Julia's, AH to Go, etc.	Travel	288	-23.2%	Netherlands	1	NS posted revenues of €6.661 bn (+12.4%). Foodservice in train stations 2018/19: major downsizing of the business - cutting off various formulas (Starbucks transfer to SSP, Smullers to Lagardère).
79	76	Euro Disney*	Foodservice at Disneyland Paris	Restaurants	277	-1.0%	France	1	15 m visitors (2018: 15.1 m). Total revenues €1.4 bn estimated: >55% theme parks, about 40% hotels & Disney Village. Theme parks average spending per guest: €55+ estimated. 70+ foodservice units resort-wide.
80	79	Dussmann*	Dussmann-Service	Contract C.	275	1.5%	Germany	11	Group sales: €2.397 bn (+2.4%). Over 64,000 employees in 22 countries worldwide. Main division: facility management. Catering: biggest market Germany (€198.5 m/+0.8% estimated).
80	82	Hesburger	Hesburger	QSR	275	5.8%	Finland	6	Operating 458 (+23) units (about 300 Finland, more than 100 Baltic states). Family owned, 6,600 employees.
82	80	Courtepaille*	Grill Courtepaille	Restaurants	265	-2.0%	France	1	Oldest restaurant chain in France. 290+ units throughout the country - mostly company owned. About 14 m guests, 3,000 employees.
82	81	Trivalor*	Gertal, Itau, Cerger, Serdial Vending	Contract C.	265	0.0%	Portugal	1	Total group sales: €885 m, 26,413 employees. Foodservice sales: €265 m (+/-0%), 2,000+ sites, 75 m meals, 5,000+ vending machines. Gertal - main business with nearly €150 m sales.

*Turnover estimated [1] Presence in European countries

Gretel Weiss: Learnings from the Corona pandemic

1. *Covid-19 involvement:* Extreme polarisation within the hospitality world. Relatively small losses for well established, strong fast-food brands at one end of the spectrum. At the other: contract and event catering, pubs, bars, discos and metropolitan hotels have seen heavy falls in revenue. Background: overall socio-economic conditions, trends in footfall and coronavirus-related restrictions on use of floor space and opening times.
2. *Farmers, food and foodservice:* Their value and importance has risen considerably in the mind of the general public. Yes, they are 'system-relevant'! Much sympathy and support by regulars. We are registering a new attitude on the part of consumers towards quality and price. This should be understood as a great opportunity for the foodservice industry – it will allow for upward price adjustments.
3. *Eating and drinking:* The large majority of people change their preferences only minimally. Millions of consumers remain typically loyal to their favourites or are coming back to them. 'Innate' restaurant products such as burgers and pizzas are now familiarised and perceived as 'comfort food'. The result: little or no need for innovation in the range of products.
4. *Sales channels:* New weighting of on-premises, to-go, pick-up and delivery. Off-premises very much on the up-and-up – even for more high-grade products. Here, the disruption by the Covid-19 pandemic and thus the need for innovation, is at its greatest. Many questions need some cost-intensive decisions for a new normal. The task is to rethink things and to consider alternative capacity (ghost kitchens). Critical in terms of execution: digitalisation and logistics.
5. *Private demand:* It is recovering faster than business demand. This is true of now and of the future. Many people are now treating themselves deliberately to good food and drink, while business trips and corporate celebrations are very much in decline. Note: with heavily increasing unemployment rates price sensitivity will return.
6. *Location and floor-space requirements:* Major shifts in the demand of foodservices from the property market. Two of the most striking developments: outdoor seating has become an absolute must for cafés and restaurants. That is likely to remain the case. And: drive-in counters have been and are the absolute winners from Covid-19 (minimal contact risk) – an absolute plus for QSR brands such as McDonald's, Burger King and KFC.
7. *Travel hubs:* As regards footfall, a 180-degree change from top to flop. Suburban and main-line railway stations and airports are considerably less attractive in the new normal than they once were. The trend towards working from home and fewer tourists and business travellers has affected the role of these once star locations with high rental costs. One of the most striking examples is Pret A Manger in London.
8. *Neighbourhood locations:* These are attracting quite a lot of new attention of both restaurant operators and guests. At the moment, the closer the place is to where the consumer lives, the better. Particularly relevant regarding pick-up sales for concepts of all kinds.
9. *Value-added chain:* Mono-channel suppliers in the foodservice and hotel sectors have been hit extremely hard by the collapse of demand caused by the pandemic. They lack the trade-off provided by greater business in retail (supermarkets, discount stores etc.). No risk spread!
10. *Digitalisation:* Covid-19 has accelerated digitalisation all across Europe, including countries which are backward in this respect (e.g. Germany). This applies to various levels in business: guest communication via social media, process management and new business models. In quickservice concepts this is tending to lead to automation. On the whole, it is true to say that Covid-19 is acting as a trend accelerator.
11. *Staffing:* In countries such as Germany and Switzerland there may emerge a radical transformation in supply and demand. Even in large cities, home-grown workers may be at disposal again. This point should not be ignored when rethinking the future. It implies opportunities for more ambitious culinary concepts.
12. *Forecast:* Looking forward, the challenge for foodservice players is to maintain their own DNA while ensuring flexibility at its max, whenever necessary. Keep in mind: Whatever systemisation can bring about, foodservice is a human affair, a people's business. Crucial for success - that's what the pandemic has taught us once again.
Analysis as of the end of September 2020 from a Central European angle.

ver amounts to more than €9.1 bn, an increase of 7.2% (2018: +3.9%). For the first time, there is a billionaire in this category - the Restaurant Group from the UK (following the takeover of Wagamama).
The strongest growth came from this new category leader (+56.4%), followed by the German brand L'Osteria, with 20.6% more sales than in 2018. At the opposite end of the spectrum, there are seven names with declining figures.
With some exceptions, most of the companies in the restaurant sector are multi-concept operators, with interests covering the entire culinary spectrum. Common features of the business are: it's about hospitality, it's about main meals, it's about going out for dinner and it's about culinary highlights. Generally speaking, their main competitors are small local businesses, which still constitute the bulk of the restaurant industry. And this is true in practically all countries, especially in Germany, Switzerland and Austria.

Pubs

When it comes to pubs, a uniquely British sector, nine players generated a turnover of nearly €9.5 bn in 2019 – an increase of 3.2% (2018: +3.0%). The leaders are three billionaires in the UK: Mitchells & Butlers, Wetherspoon and Greene King. Only the Stonegate pub company has a double-digit plus of 10.1%.
At the opposite pole we find just one player with a double-digit decline in sales.

In-Store

This segment is represented by only three companies, with a combined foodservice turnover of €2.3 bn in 2019, an increase of 3.1% (2018: +1.8%). The category is headed by Ikea, which is also the growth champion as it has been many times before (+5.5% estimated).
In-store – including the foodservice business in large department houses – played a much more important role in the away-from-home market in the 80s and 90s than today. Germany is the best example for this downward trend and Ikea the absolute exception.

+++ We have used figures from the end of 2019 / beginning of 2020 - without adjustments for the Covid-19 crisis. That way, the successes and overall impressions of the year will remain valid for future consideration and comparison. +++

A Record Year for Europe's. Top 2019

Europe 2019: Top 99 Foodservice Groups

R	'18	Group	Main brands	Main sector	Sales '19 (€ m)	vs. '18 in cc	Country of origin	EC[1]	Notes cc= constant currency, LfL = Like for Like-sales/same store sales
84	99	Dodo Pizza	Dodo Pizza	QSR	257	45.7%	Russia	7	Worldwide sales: RUB20.244 bn (+48.7%) in 7 countries with 576 stores (+136) . Europe: sales RUB18.640 bn (+45.7%), 529 delivery units (+125). Founded in 2011, today No. 1 pizza brand in Russia.
84	92	L'Osteria	L'Osteria	Restaurants	257	20.6%	Germany	8	121 units (+17) in Europe. Germany: sales €210 m (+21.2%/LfL +1.3%), 100 units (+15). Austria 14 units. Pizza chain with strong expansion.
86	84	Klüh	Klüh Catering	Contract C.	256	2.1%	Germany	1	Total sales: €851 m (+5.7%) mainly facility-management services in 8 countries. Contract catering only in Germany: 240 agreements (+9), more than 5,300 employees.
87	89	Ausolan	Cocina Central Goñi, Comisilagun, Alprinsa, etc.	Contract C.	254	10.4%	Spain	2	Institutional feeding, system with 16 central kitchens. Largest Spanish contract caterer - besides international players. 2019: acquisition of Alprinsa.
88	86	ZFV-Unternehmungen	SBB/Swiss Life/UBS Restaurants, etc.	Contract C.	250	0.3%	Switzerland	1	Founded in 1894 as a cooperative society. Total turnover: CHF278.5 m (+0.3%). 177 contracts, restaurants, etc. (-2). 11 m meals, nearly 1,850 employees.
89	78	Shokoladnitsa	Shokoladnitsa, Coffee House, Vabi Sabi, etc.	QSR	248	-10.5%	Russia	3	Coffee bar group (total 430+ units): RUB18.0 bn (-10.5%). Shokoladnitsa (330 units), Coffee House (42 units), Vabi Sabi (20 units). Owner: the Kolobovs family (together with investors also Burger King's master-franchisee in Russia/sales figures not included).
90	88	NorgesGruppen	Big Horn Steak House, Kaffebrenneriet, etc.	QSR	239	4.6%	Norway	2	Total sales NOK90.5 bn. Foodservice sector: NOK2.354 bn (+4.6%). Total: 643 restaurants and QSR/convenience units (+-/0). Excludes petrol stations.
91	91	Novikov Group*	Novikov Fine Dining, Prime Star, Krispy Kreme, Farsh, etc.	Restaurants	230	5.0%	Russia	2	Many different partners and concepts under Arkadiy Novikov's umbrella. 230+ restaurants: approx. 80 fine/upper casual dining; 147 chain units: 100 Prime Star, 26 Krispy Kreme, 21 Farsh. Flagship store in London.
92	72	Casual Beer & Food	Official Irish Pub, Gambrinus, Cruz Blanca, etc	Pubs	227	-24.3%	Spain	1	In total nearly 450 units. Main brands: Official Irish Pub and Casa Gambrinus (restyling). Owned by Abac Solutions. 2019 many pub closings.
93	90	Moto*	Moto, M&S, Costa, Burger King, etc.	Travel	222	-1.6%	UK	1	Britain's largest motorway network with 68 sites at 53 locations. Total group sales: £780.7 m (-1.6%). Foodservice share of 25% estimated.
94	96	Dunkin' Brands*	Dunkin' Donuts, Baskin-Robbins	QSR	220	12.0%	USA	14	Worldwide system sales: $12.1 bn (+4.6%), 21,297 (+385) points of distribution: Dunkin' Donuts 13,137, Baskin-Robbins 8,160. Europe: 650+ units.
95	93	O'Learys	O'Learys	Restaurants	219	-2.2%	Sweden	9	Worldwide sales: SEK2.368 bn (-2%)/142 units (-2). Europe: system sales SEK2.320 bn (-2.2%), 127 (-3) event restaurants. Top 3 countries: Sweden, Norway, Finland.
96	95	Marché Int./Moevenpick	Marché, Mövenpick, Palavrion etc.	QSR	197	-8.4%	Switzerland	7	Total sales of Marché International: CHF253.6 m (-8.3 %)/76 units (-13). Europe: CHF219.6 m sales (-8.4 %)/62 units (-15). Top 3 countries: Germany, Slovenia, Austria.
97	98	Block Gruppe	Block House, Jim Block, etc.	Restaurants	190	2.1%	Germany	4	Group sales: €410.5 m (+4.9%). 74 restaurant units: steak houses & co. Vertical integrated system. Foodservice in Germany: €177.1 m (+2.8%), 63 units.
97	-	O'Tacos*	O'Tacos	QSR	190	25.0%	France	4	250 restaurants with so called french tacos. The concept started 2007 in Grenoble, today 211 units in France. Very strong expansion. Since 2018 owned by Kharis Capital (Belgium).
99	94	Granier Consupan	Granier	QSR	180	-13.9%	Spain	6	Bakery Café chain born in Barcelona. In 2019 downsizing from 357 to 325 units. Mostly franchised. Also stores outside of Europe.
		Top 99 Total			127,381	7.4%			

*Turnover estimated [1] Presence in European countries

Final thoughts and takeaways

▸ McDonald's lead the pack, far ahead of all the competition with an increased turnover of €2.0 bn. The dominance – 20.8% of all top 99 sales is even higher on our continent than in similar rankings in USA. The growth exhibited by the world's market leader derives first and foremost from strengthened sales in existing restaurants. Contributing to this is their ever-increasing delivery business, as well as, of course, the digitalisation of the entire sales process. The best examples for average annual sales per store are Switzerland (CHF4.6 m) and France (€3.7 m.).

▸ The share that American quickservice brands hold in the Top 99 chart is again on the increase and is now up to 39.0% of all sales. Ten years ago in 2009 this figure was 31.9%. In more and more countries, multi-concept-players are master franchisees, who bring together local knowledge and global brand power. The best examples here are Scandinavia on one hand and Spain on the other.

▸ At both national and European level, mergers and acquisitions are changing the landscape of ownership dramatically. These are mainly strategic moves.
The 2018 list showed quite a few instances where Coca-Cola, JAB and Alsea came out on top. In the 2019 ranking, we see, with large striking, the Restaurant Group at rank 23 following the takeover of Wagamama and, again, Alsea Iberia at rank 28 with the acquisition of Grupo Vips. Already announced for 2020 is the sale of the LSG Group's European business to Gategroup and Fazer is set to sell its foodservice business to Compass.

▸ Scandinavia: in the north, the strategies and operations of restaurant players are typically more sustainable than in other parts of Europe. The benchmark, Max Burgers from Sweden (rank 63), was the first climate-positive food brand in the world with a high proportion of plant-based products. Also an early mover in terms of vegan offers.

▸ Chain networks: for Yum! Brands Europe represents 54 national markets, for McDonald's, in second place, 39 and for Subway 34. This entails maximum adaptation to different consumer profiles in these regions. On the other hand, more than 20 players in the top 99 operate only in their home country. The biggest of these is Groupe Bertrand in France (rank 12), with sales of more than €2 bn. Most single-market players are based in the UK.

▸ Take away & delivery is an important growth pass for the industry. In the matrix of change, delivery and related services are becoming a leading contributor to comparable sales. The market is evolving rapidly. Aggregators and delivery-only kitchens of all kinds are the drivers. Social media is also playing a big role – but not only in this context.

▸ Burgers & pizza: These two billionaire bestsellers in our sector enjoy a major presence in our ranking. They are products that are very much 'born' of the gastro culture and have plenty of scope for growth in the coming years. Both offers provide the security of choice and a good culinary feeling for the millions of consumers in the away-from-home market. Key characteristics of burgers and pizza are: all-in-one meal, lunchtime-evenings-always, hand-held snack or on a plate, maximum protein variability - animal, vegetarian and even vegan.

▸ Balanced profile: successful companies are carefully balanced in several dimensions: strategy – operations, global – local, tradition – trends, consumer focused – supplier supported. The aim must be long-term success – in the interests of staff, brand and owners.

2019: Top 5 by sector

Sector	R	Group	Sales '19	vs. '18 in cc
QSR	1	McDonald's*	26,500	8.2%
	3	Yum! Brands	6,826	24.4%
	5	Burger King*	5,740	11.0%
	7	Domino's Pizza*	2,970	8.0%
	9	Starbucks*	2,430	8.0%
		Top 5 total	**44,466**	**10.7%**
Contract/ Caterer	2	Sodexo	8,129	5.7%
	4	Compass Group	6,675	1.6%
	6	Elior	4,923	0.8%
	17	Aramark*	1,800	6.0%
	25	WSH*	1,083	5.5%
		Top 5 total	**22,610**	**3.4%**
Pubs	8	Mitchells & Butlers	2,550	3.9%
	13	Wetherspoon	2,074	7.4%
	14	Greene King*	2,050	0.0%
	27	Stonegate Pub Company	972	10.1%
	32	Marston's	894	2.9%
		Top 5 total	**8,540**	**4.3%**
Travel	10	Autogrill Group	2,163	1.2%
	11	SSP	2,140	6.4%
	20	Areas	1,394	3.0%
	22	Gategroup*	1,303	-4.0%
	24	LSG Sky Chefs	1,222	1.7%
		Top 5 total	**8,222**	**2.0%**
Restaurant	23	The Restaurant Group	1,223	56.4%
	29	Nando's*	940	6.0%
	38	Agapes*	690	-2.0%
	41	S-Group	671	2.2%
	42	Whitbread	667	1.3%
		Top 5 total	**4,191**	**13.6%**

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Some final words

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

Special thanks to
Paul Fedèle (France),
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for all their help.

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

3

La predilección de la Redacción de FSE &ME por escribir sobre la evolución del segmento de los coffee-bars o coffee-shops en Europa, no fue una decisión por azar; sino que era consciente del creciente papel que iban a tener en el foodservice, máxime cuando marcas como Starbucks o McCafé empezaron a acosar la posición hegemónica de Costa Coffee o Tchibo en sus países nativos.

De ahí que ya desde los primeros números los reportajes fueran intensos y una vez al año –a partir del 2006– se publicará un ranking con los principales grupos de coffee bars, al que se le añadía información sobre ciudades (como Londres) y marcas con dinámica significativa. Información enriquecida, además, por la generada por Alegra, la consultora especializada en toda la cadena de valor del café.

La presencia española, en esta segunda etapa considerada, comienza a perder relevancia fruto de la emergencia de otras marcas en países como Rusia, que poseerán tasas de crecimiento espectaculares y porque, algunas elegirán pasarse al segmento bakery café más que quedarse, simplemente, en el de los coffee bar.

A la espera de la llegada de los grupos de China, destacar cómo McCafé ha superado ya a Starbucks y Costa Coffee sigue sin poseer, o difundir, una estrategia de desarrollo que le haga regresar a etapas hegemónicas, antes de ser adquirida por Coca Cola.

Marcas todas ellas que ahora deben reposicionarse, a raíz del boom del café de especialidad y del empuje de las marcas chinas en su propio macro-país o en los elegidos para su expansión internacional.

Del conjunto de informes anuales y sus complementos sobre ciudades europeas con sabor a café, como Londres o resúmenes de trabajos de consultoras especializadas, se han seleccionado los siguientes que pueden consultarse en la dfv mediante mail a www.dfv-archiv.de

Contenido: TOP Coffee Bars in Europe

Fecha de Aparición	Título	Contenido
2011	Top 3 Brands up 10%	Ranking 2010
2016	Growing Dominance of Big Players	Ranking 2015
2019	An Increase of 1000	Ranking 2018
2020	Top of the Bars	Ranking 2019
2020	Coffee in the land of Tea	Mercado UK
2021	Between Growth and Survival	Ranking 2020
2022	There´s a New Number One	Ranking 2021

Fuente: dfv Mediengruppe

Como ejemplo se reproduce aquí el titulado: *There´s a New Number One*

There´s a New Number One

The top 90 coffee shop brands in Europe were able to grow their store network by roughly 3% in 2021 - a year that was once again impacted strongly by the Coronavirus pandemic. The number one and two in our exclusive ranking have traded places.

Expansion continues – despite the Covid-19 pandemic and ongoing lockdowns in some countries. The 90 coffee shop player with the strongest presence in Europe operated 20,226 shops at the end of last year, 2.8% more than 2020.

Once again, there were clear winners and losers when it comes to the number of units.

One of the concepts that expanded strongly was fast-food world market leader McDonald's store-in-store solution. McCafé surpassed long-standing number one Costa Coffee with an increase in units of 3.2%. The number of Costa Coffee outlets declined by 1.5%. Starbucks is the only one of the three leading players to have not yet taken the 3,000-unit hurdle. The number three in Europe had exactly 2,973 stores at the end of 2021, an increase of 4% over 2020. The US brand, however, has the broadest international reach with a presence in 29 European markets.

In absolute figures, Starbucks is in the lead, with 117 new coffee houses, followed by 5 to go, with an increase of 107 units and McCafé and One Price Coffee with 99 new stores respectively. In relative terms, 365 Obrador, Espresso Lab and One Price Coffee are in the first three places of the ranking, with increases of 78.4%, 64.2% and 61,5% respectively.

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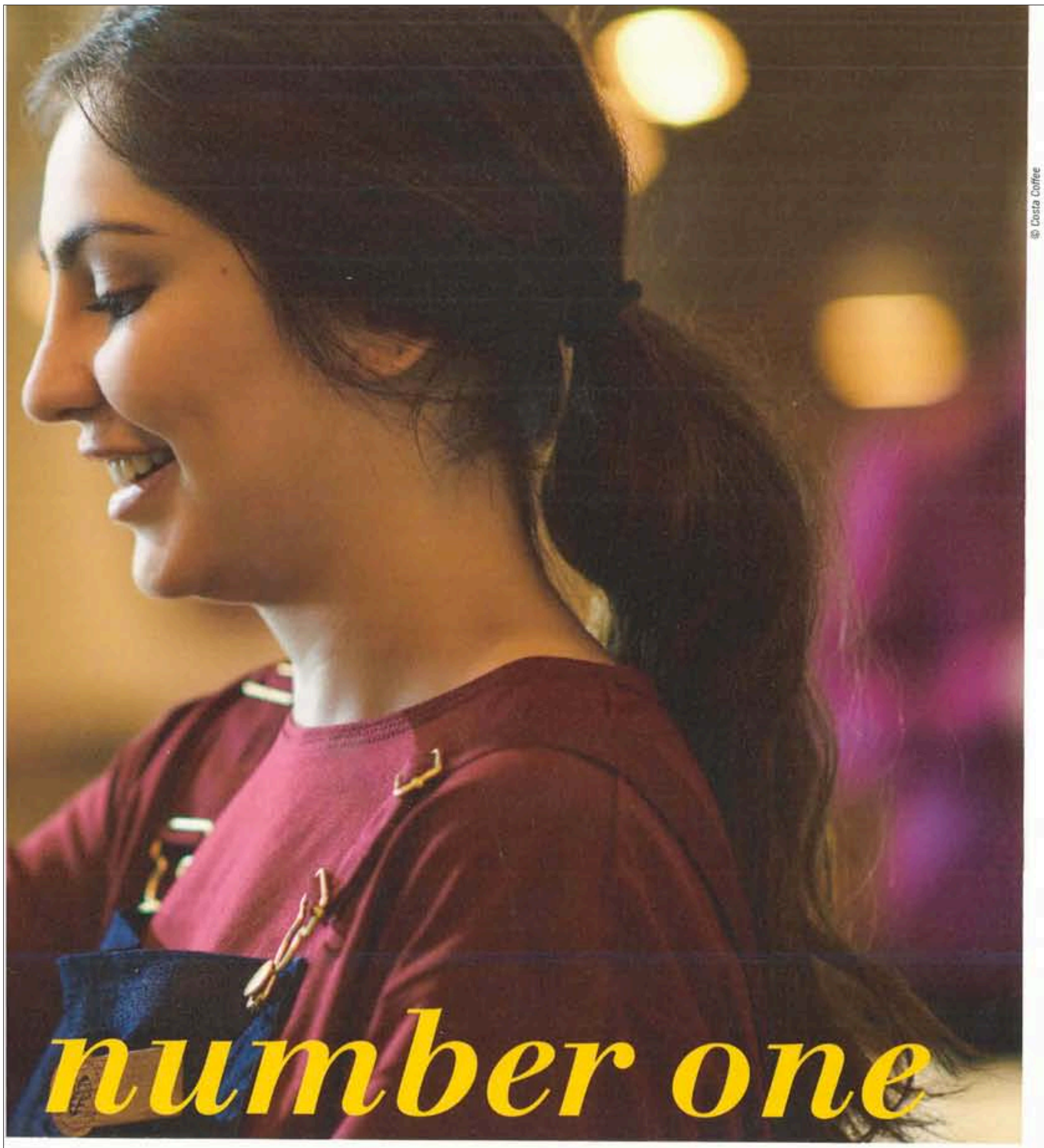

Costa Coffee lost the top spot in the ranking to McCafé. The coffee bar chain was acquired by drinks behemoth Coca-Cola in 2019.

"2021 was another unpredictable year for our trade. The global pandemic again had a firm grip on our industry and in only one year we both had to first shut down and then re-open many of our shops," says Sinne Fiil Fredslund, Director Brand and Communication at Espresso House about business in the past year.
The Coronavirus pandemic has far-reaching consequences for the entire out-of-home market, especially coffee bars worldwide. Achilleas Lazarou, Network Development Manager at Coffee Island, sums up the biggest challenges facing the coffee bar industry: "The majority of the global workforce will continue to work from home and thus coffee shops will need to reach consumers where they are and deliver the same experience they have in the shops. Increasing operating costs and labour shortage." That is why Pavel Goncharov, CBDO of Israeli coffee bar brand Cofix (rank 18) suggests checkout-free solutions to lower labour costs.
According to Frendslund, the trends we are seeing everywhere in coffee bars in the world included digitalisation, cold drinks - with or without coffee - and coffee bars as co-working spaces.

Goncharov says that "more plant-based and non-dairy food and beverages" are also a trend. Jan-Christoph Küster, Chief Marketing Officer of Coffeeshop Company (rank 27) believes there is a continuing trend towards premium quality and local, organic and healthy products.
"We are working hard on offering products that have a higher quality and are sourced more locally. In 2022, we will focus mostly on coffee and will provide three coffee blends in order to have the perfect and most adapted blend for each drink in our coffee shops. All of our coffee blends will also be organic by the first semester of 2022," says Nicolas Riché, CEO of Columbus Café (rank 17) about the coming years.
All aspects of sustainability is, and remains the issue that most influences operative and strategic decisions.

There´s a New Number One

"When it comes to sustainable coffee, the challenges we have to tackle are huge. The focus is on the people involved, the planet and profits. According to research, coffee production will have decreased by 50% in 2050 due to climate change, damaging agricultural policies and the fact that producers no longer see a future in coffee. With the coffee we consume with great pleasure every day comes great responsibility for all brands in the coffee industry concerning basic issues such as the long-term fight against climate change, sustainable agricultural products and recycling projects," says Ersin Kefeli, Marketing & Corporate Communications Manager at Espresso Lab (rank 35) and adds: "With 'Future Generation Coffee', we have implemented a new movement that will focus on all these problems and is a joint effort of all coffee industry players. At Espressolab, we support the social and economic empowerment of coffee producers in Kenya, Ethiopia and Guatemala. We recycle organic coffee sacks from various countries such as Brazil, Guatemala, Kenya and Honduras. The income from the sale of the bags is used to support coffee producers."

Minas Patanas lists plastic waste reduction and the adoption of re-use alternatives as further issues. Patanas is Group International Business Director at Greek chain Everest (rank 20) and Flocafé (rank 30) and elaborates how parent company Vivartia is preparing for the coming years. Measures include curbside pickup – "we bring your coffee to your car" – expanding online ordering and loyalty programmes and pioneering sustainability and circularity initiatives.

Because of the Covid-19 pandemic, the ready-to-drink (RTD) business has become more important for several brands, for example Australian chain Gloria Jean's. Caitlin O'Connor, International Marketing & Franchise Launch Manager, says: "Covid lockdowns have forced brands to not only embrace new store formats and step up their online operations but to find new channels to continue to deliver sales growth."
In a nutshell, Adrian Ayres, Operations Director at Puccino's, says what needs to be done in the future: "We need continued focus on the supply chain, with pricing and product viability. We need to be more fluid in our approach towards price changes and product delistings and replacements.

2021: The top coffee shop players in Europe (ranks 1 to 25)

R	(R) 20	Brand	Company	http://	No. of units 2021[1)]	vs. 2020	Country	EC[2)]
1	2	McCafé[3)]	McDonald's	www.mcdonalds.com	3,209	3.2%	Australia	27
2	1	Costa Coffee	Coca-Cola	www.costa.co.uk	3,100	-1.5%	UK	15
3	3	Starbucks	Starbucks Coffee Company	www.starbucks.com	2,973	4.1%	USA	29
4	5	CaffÃ¨ Nero	Caffè Nero	www.caffenero.com	878	-2.1%	UK	6
5	4	Tchibo	Tchibo GmbH	www.tchibo.com	837	-4.5%	Germany	8
6	6	Coffee Like*	Coffee Like	www.coffee-like.com	820	0.9%	Russia	2
7	7	Coffee Island	Supply Unique SA	www.coffeeisland.gr	503	4.6%	Greece	6
8	8	Espresso House	Espresso House Sweden	www.espressohouse.se	471	1.1%	Sweden	5
9	9	Gregory's	Gregory's Mikrogevmata	www.gregorys.gr	367	1.9%	Greece	4
10	12	5 to go	5 To Go Concept SRL	www.fivetogo.ro	347	44.6%	Romania	4
				Top 10	**13,505**	**1.9%**		
11	10	Shokoladnitsa*	Shokoladnitsa	www.shoko.ru	315	11.7%	Russia	2
12	NEW	Mikel	Mikel Coffee Company	www.mikelcoffee.com	285	16.3%	Greece	5
13	21	One Price Coffee*	One Group Coffee	www.onepricecoffee.com	260	61.5%	Russia	1
14	11	Coffee Fellows	Coffee Fellows	www.coffee-fellows.de	234	-2.9%	Germany	6
15	16	Kahve Dünyasi*	Kahve Dünyasi	www.kahvedunyasi.com	219	7.4%	Turkey	3
16	13	DIM Coffee*	DIM Coffee	www.dimcoffee.ru	217	3.8%	Russia	1
17	17	Columbus Café	Columbus Café	www.columbuscafe.com	215	7.5%	France	4
18	14	Cofix*	Urban Cofix Russia	www.cofix.ru	209	1.0%	Israel	3
19	18	Coffee Way*	Coffee Way	www.coffeeway.ru	206	3.5%	Russia	2
20	15	Everest	Vivartia Foodservice Group	www.everest.gr	202	-1.5%	Greece	1
21	19	Hema Koffiecorner*	Hema	www.hema.nl	194	-1.0%	Netherlands	8
22	23	Bodriy Den*	Bodriy Den	www.bodriy-den.ru	180	21.6%	Russia	3
23	20	Insomnia Coffee	Insomnia Coffee Company	www.insomnia.ie	173	3.0%	Ireland	2
24	21	chicco di caffè	chicco di caffè	www.chicco-di-caffe.de	163	1.2%	Germany	1
25	29	Gloria Jean's Coffee**	Retail Food Group	www.gloriajeans.com	147	8.1%	Australia	16
				Top 25	**16,724**	**3.2%**		

*1) 31.12.2021 2) countries in Europe 3) basis: company data and estimates *estimated **previous year adjusted*

There´s a New Number One

The primary focus will remain on profitability. We need a tighter management control and a better understanding of the business."

Due to the current political situation in Russia, figures for the Russian chains in the ranking have been estimated. The impact of the war in Ukraine on the top coffee bar ranking in Europe is obvious. The estimated 296 McCafés and 132 Starbucks outlets for example are no longer included. The parent companies of both chains have withdrawn from the Russian market and sold operations to local players.

A short overview of the top 10 brands

1. McCafé. The store-in-store coffee bar concept of world market leader McDonald's strongly increased the number of outlets in several countries in 2021. McCafé expanded in Italy, France and Switzerland. In Russia, the number of McCafé units rose by an estimated 5% to 296. The total number of McCafé stores in the ranking is likely to be lower than in 2021 because the chain withdrew from Russia due to the war in Ukraine.

2. Costa Coffee. The British coffee bar chain operated 3,100 outlets in 15 European countries at the end of 2021. In total, the number of stores declined by 1.5% and the company fell from first to second place in the ranking.
In 2019, drinks behemoth Coca-Cola officially acquired Costa Coffee from Whitbread for US$4.9 bn or roughly €4.3 bn.
Coca-Cola's coffee bar sales increased by 27% in the first quarter ending 1st April 2022, "mainly due to" the closing of Costa stores in the UK in the same period, media reports say.
In July, the Costa Coffee's CEO Jill McDonald resigned and switched to an international position at McDonald's. The company is expected to announce a replacement shortly.
In August 2022, Costa Coffee celebrated the opening of its 300th drive-thru in the UK. Together with its franchise partners, Costa Coffee plans to invest in 60 new drive-thrus by the end of 2022. The openings are part Costa Coffee's ambitious expansion strategy that includes several formats such as high street and shopping centre stores and Costa Express self-serve machines. The chain was launched in 1971 and today operates more than 4,000 stores worldwide.

3. Starbucks. The coffee bar brand with the strongest global presence increased the number of units by 4% in Europe. The UK is the group's biggest European market with 1,111 coffee bars. According to several newspaper reports, Starbucks is looking for a buyer for its UK division. The brand directly operates around 300, while the remaining 700 stores are run by franchisees.
Strong sales growth was achieved worldwide in 2021 despite the new virus variant. However, the macroeconomic environment remains dynamic and Starbucks expects higher costs and a tight labour market due to Omicron. In the first quarter ending 2 January 2022, growth came mainly from existing stores, but only in North America and the US. International sales including China declined first three months of the year.
Starbucks opened 484 new stores in the first quarter of financial year 2022, 4% more than in the previous year. At the beginning of January

French brand Columbus Café is in 17th place in the ranking of the biggest coffee bar chains in Europe. The company increased the number of stores by 7.5% to 215 in 2021.

There´s a New Number One

FACTS & FIGURES_COFFEEBAR RANKING EUROPE

2021: The top coffee shop players in Europe (ranks 26 to 56)

R	(R) 20	Brand	Company	http://	No. of units 2021[1]	vs. 2020	Country	EC[2]
26	24	Segafredo Zanetti Espresso	Segafredo Zanetti Espresso	www.segafredofranchising.com	117	-13.3%	Italy	14
27	24	Coffeeshop Company	The Coffeeshop Company	www.coffeeshopcompany.com	116	-14.1%	Austria	11
28	NEW	Surfe Coffee*	Surf Coffee Company	www.surfcoffee.ru	111	26.1%	Russia	1
29	26	Robert's Coffee	Oy Skinnvest AB	www.robertscoffee.com	110	-9.1%	Finland	4
30	30	Flocafe Espresso Room	Vivartia Foodservice Group	www.flocafe.com	109	4.8%	Greece	7
31	27	Wayne's Coffee	Wayne's Coffee	www.waynescoffee.com	106	-7.8%	Sweden	7
32	31	Coffee #1	Caffè Nero	www.coffee1.co.uk	102	2.0%	UK	1
33	NEW	Pravda Kofe*	Pravda Kofe	https://pravdacoffee.ru/	95	33.8%	Russia	1
34	NEW	Santa Gloria	Foodbox	www.foodbox.es	91	15.2%	Spain	1
35	46	Espressolab	Espressolab	www.en.espressolab.com	87	64.2%	Türkei	5
36	NEW	Panaria	Compañía del Trópico	www.panariapanaderias.es	85	-1.2%	Spain	1
37	28	Caffé Vergnano*	Caffe Vergnano 1882	www.caffevergnano.com	84	-25.7%	Italy	10
38	33	Bagels & Beans	Bagels & Beans	www.bagelsbeans.nl	80	-2.4%	Netherlands	1
39	35	Traveler's Coffee*	Traveler's Coffee	www.travelerscoffee.ru	79	-1.3%	Russia	2
39	47	Vivari Pans	Vivari Pans	www.vivaripans.es	79	54.9%	Spain	1
41	40	So! Coffee	Lagardère Travel Retail	www.socoffee.pl	74	12.1%	Poland	5
42	33	illy Caffè	Illycaffè	www.illy.com	73	-11.0%	Italy	14
43	36	Café Pans	Ibersol	www.ibersol.pt	70	-2.8%	Portugal	1
43	38	Sodexo Cafeterien	Sodexo	www.sodexo.com	70	0.0%	Germany	1
45	39	Double B*	Double B	www.double-b.ru	69	0.0%	Russia	1
46	32	Café & Té	Grupo Compañía del Trópico	www.cafeandte.com	67	-22.1%	Spain	1
47	59	365 Obrador	Silema	www.365obrador.com	66	78.4%	Spain	1
48	41	Take and Wake*	Take and Wake	www.takeandwake.ru	65	0.0%	Russia	1
49	44	Caffé Vicino	SV (Deutschland) GmbH	www.sv-restaurant.de	63	6.8%	Germany	1
50	41	Dunkin' Coffee	Pangea Foodservice	www.dunkincoffee.es	59	-9.2%	Spain	1
51	44	Muffin Break	Foodco Group	www.muffinbreak.co.uk	57	-3.4%	Australia	1
52	47	Caffè Dallucci	Compass Group	www.compass-group.de	51	0.0%	Germany	1
53	60	Black Sheep Coffee	Conilon Ltd	www.leavetheherdbehind.com	49	40.0%	UK	2
53	49	Caffe Pascucci	Caffe Pascucci Torrefazione	www.pascucci.it	49	0.0%	Italy	10
55	50	Campus Suite	Campus Suite GmbH	www.campussuite.de	48	2.1%	Germany	1
56	54	Bakers + Baristas	Bakers + Baristas	www.bakersbaristas.com	46	15.0%	Australia	2
56	52	El Fornet	Rosendo Mila	www.elfornet.com	46	0.0%	Spain	1

*1) 31.12.2021 2) countries in Europe countries 3) basis: company data and estimates *estimated **previous year adjusted*

2022, Starbucks operated a total of 34,317 coffee bars worldwide, 51% of the stores were directly operated and 49% run by licensees.

Earlier this year, the company announced the surprise resignation of CEO Kevin Johnson. His predecessor Howard Schultz assumed the CEO position until a permanent replacement is found. The announced the leadership transition shortly before its annual shareholder meeting. Johnson worked with Starbucks for 13 years and took over as chief executive officer five years ago.

Schultz, who returned to lead Starbucks for the third time, shaped the coffee bar chain like no other. He joined the company in 1982 at the age of 29. He rose through the ranks to become CEO and took Starbucks public in 1992. With specialty coffees like Frappuccinos, the chain shook up the US market under his leadership and then expanded around the globe. His comeback went down well with investors and led to a 5% rise in the company's share price in pre-market trading.

Initially, Starbucks would not provide a reason for Johnson's resignation, but the executive had signalled to the company's board of directors a year ago that he was considering stepping down. Schultz resigned from the CEO role in April 2017 and left the company altogether the following year. The 68-year old's departure fuelled speculation at the time that he might pursue a political career. Schultz is known as an inveterate supporter of the Democratic Party.

4. Caffè Nero. At the end of 2021, the British brand operated 618 units in the UK and 260 outlets in five European countries. The number of stores declined by 2% compared with 2020. The company reported robust trading and strong like for like growth for the half ending 21 November 2021 and said that business was resilient in the Omicron period in December 2021 and January 2022, with sales at

2021: The top coffee shop players in Europe (ranks 59 to 90)

R	(R) 20	Brand	Company	http://	No. of Units 2021[1]	vs. 2020	Country	EC[2]
59	53	Kaffebrenneriet*	Kaffebrenneriet AS	www.kaffebrenneriet.no	44	4.8%	Norway	1
60	60	Soho Coffee*	Soho Coffee Co.	www.sohocoffee.co.uk	41	17.1%	UK	3
60	NEW	Valiente Cafetal Club	Cafento	www.cafento.com	41	-4.7%	Spain	1
62	62	Coffeemania*	Coffeemania	www.coffeemania.ru	40	17.6%	Russia	1
63	55	Harris + Hoole	Caffè Nero	www.harrisandhoole.co.uk	39	0.0%	UK	1
63	55	Primo Espresso	Primo Espresso	www.primo-espresso.de	39	0.0%	Germany	1
63	57	AMT Coffee*	AMT Coffee	www.amtcoffee.co.uk	38	0.0%	UK	2
63	57	Puccino's	Segafredo Zanetti Espresso	www.puccinosworldwide.com	38	0.0%	UK	3
67	43	Caffè Ritazza	SSP International	www.cafferitazza.com	37	-41.3%	UK	12
68	65	Chocolatería Valor	Chocolates Valor	www.valor.es	35	9.4%	Spain	1
69	NEW	Cafés Caracas	Union Industrial del Café	www.cafescaracas.com	34	-12.8%	Spain	1
69	65	Coffee Company	Jacobs Douwe Egberts	www.coffeecompany.nl	34	6.3%	Netherlands	1
71	70	Kanne Café	Kanne Café GmbH	www.kanne-gruppe.de	33	10.0%	Germany	1
72	67	Loops&Coffee	Loops and Coffee	www.loopsandcoffee.com	32	3.2%	Spain	2
73	70	Ground Espresso Bars*	Ground Espresso Bars	www.groundcoffee.net	31	3.3%	UK	2
74	63	Bracafé	Germán de Eurasquin	www.bracafe.com	30	-9.1%	Spain	1
74	67	Caffè Spettacolo	Valora Schweiz AG	www.spettacolo.ch	30	-3.2%	Switzerland	1
76	77	Manolo Bakes	Debocaenboca2017	www.manolobakes.com	29	11.5%	Spain	1
76	NEW	Vascobelo	Vascobelo	www.vascobelo.com	29	11.5%	Belgium	4
78	74	Tradicionarius	Fleca 2000	www.tradicionarius.es	28	0.0%	Spain	1
79	70	Doppio Espresso	Doppio Espresso	www.doppio-espresso.nl	26	-13.3%	Netherlands	1
80	78	Faborit	Faborit Coffee Shop	www.faborit.com	25	0.0%	Spain	1
80	78	Kaldi Koffie en Thee	Kaldi Koffie en Thee	www.kaldi.nl	25	0.0%	Netherlands	2
82	84	Boston Tea Party*	Boston Tea Party	www.bostonteaparty.co.uk	24	9.1%	UK	1
82	76	Café Café	Grupo Áreas	www.es.areas.com	24	-11.1%	Spain	1
82	78	Jamaica Coffee Experience	Grupo Rodilla	www.jamaicacoffeexperience.com	24	-4,0%	Spain	1
82	63	Pannus	Grupo Solgepan	www.pannus.com	24	-27.3%	Spain	2
82	78	Pause-Café / Xpresso Café*	Villars Holding	www.pause-cafe.ch	24	-4.0%	Switzerland	1
87	86	Lino's Coffee*	New Lino's Coffee	www.linoscoffee.com	23	9.5%	Italy	1
88	74	Charlotte Café	Compañía del Trópico	www.charlottefranquicias.com	21	-25.0%	Spain	2
88	84	Einstein Kaffee	Einstein Kaffee Rösterei	www.einstein-kaffee.de/	21	-4.5%	Germany	1
90	82	Testa Rossa Caffèbar	Testa Rossa Caffè	www.testarossacaffe.com	20	-16.7%	Austria	4
				Top 90	**20,226**	**2.8%**		

*1) 31.12.2021 2) countries in Europe countries 3) basis: company data and estimates *estimated **previous year adjusted*

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82% of the level in full year 2019. Since the UK lifted many government restrictions in late January 2022, the company's sales returned to over 90% of pre-Covid sales levels.

Caffè Nero said that sales skyrocketed by 211% to £135.7 m in the first half of the year ending November 2021, with EBITDA reaching £29.4 m and surpassing pre-Covid levels.

During the first half of financial year 2022, Caffè Nero also experienced a notable and encouraging increase in several of its newly established sales channels. Its delivery business through UberEats generated sales of £3.4 m in the first six months.

Sales at The Coffee At Home business, which sells Caffè Nero's coffee products at supermarkets, Amazon and on its own website, reached £1.3m in the same period. According to Caffè Nero, the new distribution channels are on target to generate incremental sales of over £10 m in its current financial year, a significant improvement over the pre-Covid period.

Caffè Nero's founder and CEO Gerry Ford commented: "We've seen a very encouraging first half of our financial year. Our business showed great resilience and recovery. Further, even with the emergence of the Omicron variant, our sales have held up. We are now trading at 90% of pre-pandemic levels and we expect to see that improve further over the coming weeks and months."

Caffè Nero owns the Coffee#1 and Harris+Hoole brands, which run 102 and 39 stores and are in 32th and 63rd place in the ranking respectively. At the beginning of February, Caffè Nero acquired the remaining 33% stake of Coffee#1 from SA Brain's. CEO Gerry Ford said to the media: "We've been delighted with the performance of the Coffee#1 business since it joined our group in 2019. It is a fantastic brand with an emphasis on great coffee and service combined with a local community-based feel, which matches perfectly

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The top 10's absolute growth in 2021

Absolute	R	Brand	Growth vs. 2020 in units
1	3	Starbucks	117
2	11	5 to go	107
3	1	McCafé[3)]	99
3	13	One Price Coffee*	99
5	12	Mikel	40
6	35	Espressolab	34
7	10	Shokoladnitsa*	33
8	22	Bodriy Den*	32
9	47	365 Obrador	29
10	39	Vivari Pans	28

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Starbucks, 5 to go and McCafé achieved the strongest absolute growth.

The top 10's relative growth in 2021

Relative	R	Brand	Growth vs. 2020 in %
1	47	365 Obrador	78.4%
2	35	Espressolab	64.2%
3	13	One Price Coffee*	61.5%
4	39	Vivari Pans	54.9%
5	11	5 to go	44.6%
6	53	Black Sheep Coffee	40.0%
7	33	Pavda Kofe*	33.8%
8	28	Surfe Coffee	26.1%
9	22	Bodriy Den*	21.6%
10	62	Coffeemania*	17.6%

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365 Obrador, Espressolab and One Price Coffee achieved the strongest relative growth.

with the ethos of The Nero Group. As we emerge from the pandemic, our intention is to return to growing stores in our group and investing in growth opportunities. Coffee#1 is very much part of that thinking. Acquiring Brain's remaining position is the first step of this post-refinancing growth phase."

5. Tchibo. The German coffee shop and retail chain operates 837 store-in-store shops in eight European countries, with most units located in Germany. The number of stores declined by 4.5%. The group generates the lion's share of sales in Germany, Austria and Switzerland.

6. Coffee Like. Russia's mini coffee bar market leader launched in 2013 and had an estimated 820 outlets in two countries at the end of 2021, an increase of roughly 1% compared with 2020.

7. Coffee Island.
The Greek coffee bar brand said it operated 503 stores in four European countries at the end of 2021, an increase of 4.6% over the previous year. "2021 was a year of transition. The Covid pandemic has changed the world and its effects will last and alter consumer behaviour. The rapidly changing environment made the 'no normal' concept daily routine and thus necessity sparked innovation along with reconfiguration in the industry," says Achilleas Lazarou, Network Development Manager at Coffee Island, about the past year. He believes that the three most important trends in the coffee shop business are, firstly, sustainability and ethics and 'insperiences', secondly, the recreation of outside experiences at home and, thirdly, coffee shop digitalisation. He also says that the biggest opportunities for coffee shop chains in Europe over the next one to three years are: "The reconfiguration of current operations as a driver to resolve past issues and enhance productivity. To adapt through crisis and strategise through the current situation to create and establish competitive advantages. To boost customer experience and loyalty through digital interaction."
Coffee Island says it is preparing for the future by strategising brand interaction with end-consumers, staying connected with customers, upgrading training processes and leveraging flex pools in the scheduling process.

© 5 to go

Romanian coffee bar brand 5 to go made it into the top ten for the first time.

© Nikos Karanikolas

"Profits have largely returned to pre-covid levels thanks to delivery and the expansion of our at-home brewing products, essentially bringing that warm cup of Mikel's coffee to your home without the need to be in store," says Dionysios K Dafaranos, International Franchise Development at Mikel.

8. Espresso House. The Swedish chain also increased the number of stores in 2021 and now has 471 stores in five countries. In terms of sales, the most important markets of the company owned by JAB Holding are Sweden, Norway and Finland.
Sinne Fiil Fredslund, Director Brand and Communication at Espresso House, believes that the biggest opportunities for the coffee bar industry are "to broaden and expand business models including digital sales channels, subscription services, third-party deliveries, sales from other segments such as petrol stations and retail." "Our coffee shops are a place where people take a break, socialise and work and at the same time, we must be able to offer our services and products there where guests are, wherever they are," she adds. According to Fredslund, the questions that arise are: "After the pandemic, what kind of guest behaviours and patterns will we see? How and where will people consume coffee in the future?" Espresso House is getting ready by tracking and analysing guest behaviour in its various markets and scaling its digital presence.

9. Gregory's. The Greek company increased the number of units by 2% last year. "2021 started with adverse conditions since Greece remained in lockdown mode until mid-May. Therefore, during this period, coffee shops experienced a decrease in sales, as only takeaway and delivery were permitted. From summer onwards, the situation improved as the vaccination programme progressed and the tourist season began. However, as from October, business faced supply chain problems and price increases for energy and other items," says Gregory's communications manager Eftychia Danakou and concludes: "In a nutshell, although 2021 was a difficult year, it delivered better results than 2020."
Business in 2021 was mainly characterised by further online channel development, with existing aggregators boosting sales and growing their business, while, at the same time, new players entered the Greek mar-

Research and ranking

This list of the top 90 coffee shop players in Europe is the result of a joint venture between the editorial staff of food service Europe & Middle East and its correspondents. Special thanks go to Carina Daugill, Mario Cañizal Villarino, Agata Godlewska, Puck Kerkhoven, Katrin Schendekehl, Sofia Selberg and Allegra Strategies World Coffee Portal.
The ranking should be fairly complete. Nevertheless, please let us know if we have left anyone out or if our information is not completely up to date.

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Starbucks Europe

Markets by units

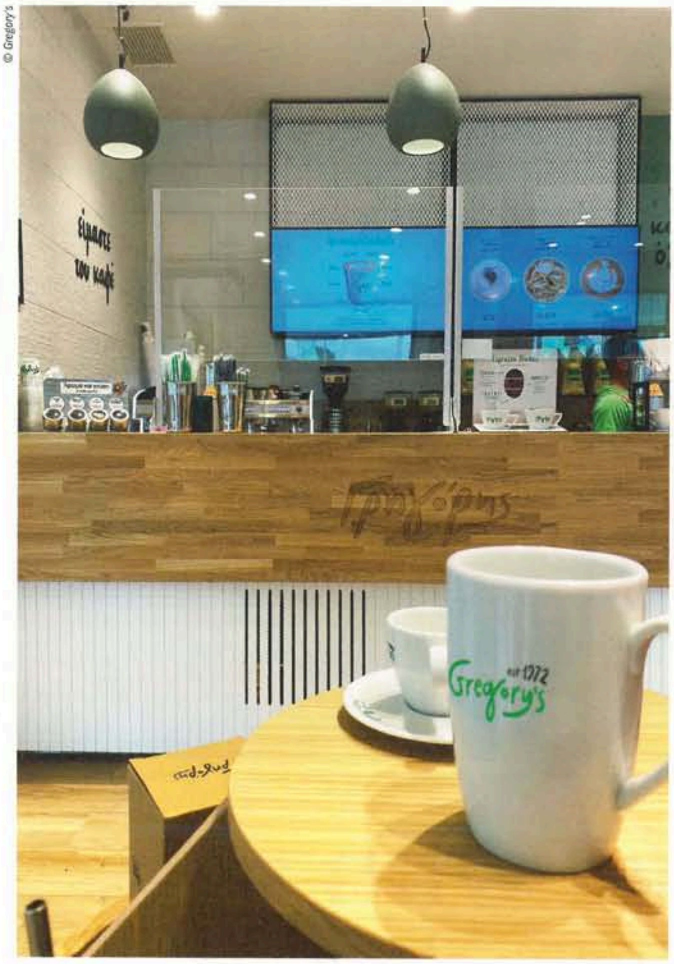
R	Country	Start	1/13	1/14	1/15	1/16	1/17	1/18	1/19	1/20	1/21	1/22	vs. 1/21
1	UK	1998	743	782	806	865	908	973	1,002	1,012	1,039	1,111	6%
2	Turkey	2003	176	202	226	265	326	407	457	509	536	570	6%
3	France	2004	82	95	102	110	132	151	177	183	187	199	6%
4	Germany	2002	160	161	160	160	161	156	157	165	157	150	-5%
5	Spain	2002	79	82	87	91	101	120	147	150	139	140	1%
6	Russia	2007	64	70	97	106	108	117	131	146	140	132	-6%
7	Netherlands	2007	28	40	51	57	61	68	79	86	89	91	2%
8	Ireland	2005	27	35	43	59	72	79	76	81	83	87	5%
9	Poland	2009	29	35	38	43	54	66	72	72	71	70	-1%
10	Romania	2007	8	8	13	19	28	34	46	53	55	55	0%
11	Switzerland	2001	51	55	60	61	59	64	63	55	49	54	9%
12	Czech Rep.	2008	14	17	19	23	28	34	41	49	51	51	0%
13	Hungary	2010	7	9	10	12	16	20	26	33	34	36	6%
14	Greece	2002	34	32	31	31	29	30	33	32	34	36	6%
15	Belgium	2008	9	11	14	15	19	21	26	28	31	33	6%
16	Portugal	2008	7	8	9	11	11	14	20	23	23	23	0%
17	Norway	2012	1	8	14	16	17	23	23	23	23	23	0%
18	Austria	2001	12	17	18	19	18	18	19	20	20	20	0%
19	Denmark	2007	4	9	16	20	21	21	19	19	17	16	-6%
20	Cyprus	2003	9	9	9	9	10	11	13	15	15	16	6%
21	Bulgaria	2008	4	4	5	5	5	7	13	14	14	14	0%
22	Italy	2018	-	-	-	-	-	-	3	9	12	14	14%
23	Slovakia	2016	-	-	-	-	3	4	5	7	8	9	11%
24	Malta	2019	-	-	-	-	-	-	-	3	4	7	43%
25	Sweden	2010	3	6	6	13	19	15	14	13	11	4	-175%
26	Luxembourg	2016	-	-	-	-	2	3	3	4	4	4	0%
27	Finland	2012	2	3	3	5	8	9	8	7	5	3	-67%
28	Monaco	2013	-	-	-	1	2	2	2	3	3	3	0%
29	Andorra	2016	-	-	-	-	1	1	1	2	2	2	0%
	Europe total		**1,553**	**1,698**	**1,837**	**2,016**	**2,216**	**2,467**	**2,676**	**2,813**	**2,856**	**2,973**	**4%**
	Middle East & Africa		**321**	**335**	**361**	**424**	**518**	**630**	**745**	**868**	**936**	**1,110**	**16%**
	EMEA Total		**1,874**	**2,033**	**2.198**	**2,440**	**2,734**	**3,097**	**3,421**	**3,681**	**3,792**	**4,083**	**7%**

© Starbucks

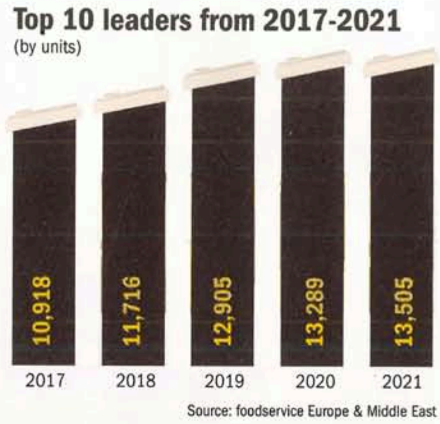
World market leader Starbucks is only in third place on the European continent.

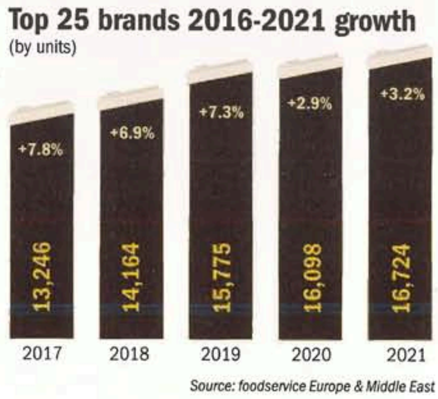
ket. The increase in inflation caused a fall in consumers' disposable income. "Consumers are looking for offers and incentives to remain loyal and remote working has enhanced consumers' need for convenience," says Danakou. The year was also marked by "difficulties in finding staff. During the pandemic, people reconsidered the way they live are looked for more flexible ways to make a living." The environment and sustainability were major issues with a focus on replacing disposable plastics with eco-friendly materials. When it comes to future challenges, Gregory's is focusing on sustainability and constantly develops new ways of achieving zero food waste, collec-

© Gregory's



Gregory's recently launched a new store design. The company is rolling out an ambitious renovation plan meaning that a large part of the existing network will adopt the new store design in 2022.





ting and returning coffee waste lo the closed loop and developing environmentally friendly packaging. The brand also continues to invest in digital transformation in both B2B and B2C by constantly launching new services and online offers. The company's goal is to offer products and services that consumers can access from everywhere and to offer an exceptional experience across all channels. The brand says it is making a great effort to support people and diversity and is constantly training franchisees and their staff arguing that the customer experience is shaped by their employees, whether it is in the store or in delivery. Gregory's recently launched a new store design to offer customers a unique shopping experience and highlight Gregory's expertise in perfect coffee. "The company has started the rollout of an ambitious renovation plan meaning that a large part of our existing network will adopt the new store design in 2022," says Danakou. In the coming years, the company will open new Gregory's stores in all Greek cities and will expand its international network. In 2022, Gregory's will celebrate its 50th anniversary.

10. 5 to go. For the first time, the Romanian coffee bar concept has made it to the ranking's top ten, with a remarkable 44.6% increase in the number of stores and its first step abroad. In 2021, the brand launched in France, the UK and Belgium. Radu Savopol, the company's CEO and founder, says that it was "a year with many expansion opportunities but also with many supply challenges. Overall, it was a good year for us!" "The supply chain will be the biggest challenge, along with maintaining and opening up new markets," adds Savopol. 5 to go says that suppliers are a priority and that it set up its own distribution and import company. "We are also prepared to enter new markets and expand our operational team every year. We have also created new products for hospitality and retail," he concludes. ◆

Ilona Renner

THE WORLD BY NUMBERS

How do you like your coffee?

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Coffee (flavour) preferences and purchase intent from restaurants and foodservice venues across Europe and the US

Likelihood to purchase a milk substitute*

Germany	5%
France	6%
UK	6%
Spain	6%
United States	4%
Global average	10%

Source: Technomic Global Consumer Surveys Q2 2022 & Q4 2021

Q: "Which types of beverages do you order at restaurants or other dining establishments at least occasionally (once every 90 days)? Select all that apply." – *Milk substitutes such as oat milk, rice milk, almond milk

"The likelihood to purchase dairy milk substitutes such as almond milk, oat milk and rice milk is relatively low globally at 10%, and much lower across European countries."
Aaron Jourden, Senior Research Manager – Global, Technomic

Coffee purchase intent

	Hot c offee	Hot specialty coffee*	Cold/iced/b lended coffee
Germany	38%	39%	14%
France	35%	22%	10%
UK	25%	26%	14%
Spain	37%	28%	19%
US	25%	14%	18%
Global average	33%	30%	23%

Source: Technomic Global Consumer Surveys Q2 2022 & Q4 2021

Q: "Which types of beverages do you order at restaurants or other dining establishments at least occasionally (once every 90 days)? Select all that apply." – *Specialty coffee such as cappuccino, espresso, flat white, latte

"Regular hot coffee is enjoyed at foodservice venues rather widely across Europe and is more popular with consumers than specialty coffees such as cappuccino, latte and flat white, and cold and iced coffee preparations." **Aaron Jourden, Senior Research Manager – Global, Technomic**

Top 3 flavours for coffee

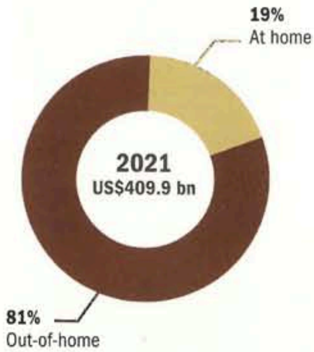
Germany	**Amaretto (27%)**	**DarkcChocolate (25%)**	**Caramel (24%)**
France	Hazelnut (32%)	Dark chocolate (32%)	Caramel (32%)
UK	Caramel (27%)	Mocha (26%)	Milk chocolate (22%)
Spain	Milk chocolate (35%)	Cinnamon (33%)	Vanilla (32%)
United States	Caramel (34%)	Vanilla (32%)	Hazelnut (27%)
Global average	Milk chocolate (32%)	Dark chocolate (31%)	Caramel (31%)

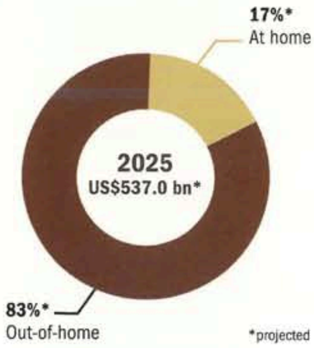
Source: Technomic Global Consumer Surveys Q2 2022 & Q4 2021

Q: "Which flavours are appealing to you for hot or iced coffee? Select all that apply."

Out-of-home vs. at-home consumption

Worldwide revenue in US$ bn





*projected

Source: Statista Consumer Market Outlook 2022

In 2021, 81% of spending on coffee was attributable to out-of-home consumption, with OOH-demand projected to continue to grow over the next few years.

"Each country in Europe has a distinct flavour preference for coffee that sets it apart from its regional neighbours. Amaretto is most preferred in Germany, hazelnut is the most popular in France, cinnamon is well liked in Spain and mocha shines in the U.K."
Aaron Jourden, Senior Research Manager – Global, Technomic

6/7 *foodservice* EUROPE & MIDDLE EAST AUTUMN/2022

About the Spanish Branded Restaurants Chain and some Concepts to Watch

4

La presencia de reportajes sobre la evolución del foodservice en España mantuvo su protagonismo, en esta segunda etapa; aunque bajó en frecuencia que, sin embargo, fue completada por aceptar desde la redacción de la revista, propuesta de cobertura de información original y de oportunidad, la cual se salía de la programación, confirmando el interés que siempre tuvo el team de Redacción sobre lo que sucedía, especialmente, en la restauración de marca.

Casos como la irrupción del grupo Larrumba en Madrid, la defensa de la hostelería que Ayuso ejerció en la CAM durante la pandemia o el sports bar de LaLiga en Port Aventura, fueron recibidos con más interés, que otros reportajes que, de toda Europa, podrían haber publicado.

En cuanto a restaurantes reseñados con su ficha, en las secciones Hot Trend y/o Concepts to Watch, en esta ocasión obedecerán más a reportajes temáticos paneuropeos; como por ejemplo, heladerías, pastelerías, cervecerías, tex-mex o hotdogs.

Se han seleccionado los más destacados al igual que los comentados reportajes sobre el foodservice en España y cuyo documento completo se puede lograr accediendo a la hemeroteca de la dfv mediante mail a www.dfv-archiv.de

De ellos, aparecen a continuación:
- Madrid´s Most of Dinamic Trend Setter (2018)
- Flexitarian Pionners (2019)
- 100% Experiential Sports Bar

Índice de artículos y reportajes sobre Foodservice en España

Fecha de Aparición	Título	Contenido
2013	Beer driven, Affordable, Ambitious	100M Restalia
2015	Barcelona: From Pintxos to Broquetas in the Born	Barcelona Restaurants
2015	Madrid:Spain´s Biggest Food&Drink Spectacular	Madrid Restaurants
2016	Dream Destination by Foodies	Barcelona Restaurants
2017	Seizing the Moment	Nostrum
2017	Ritmo in the Market Again	Spanish Foodservice
2018	Stars Chefs Take the Casual Route	Casual Restaurants
2018	Madrid´s Most of Dinamic Trend Setter	Madrid Restaurants
2019	Flexitarian Pionners	Flax&Kale
2019	A Market in Upheaval	Spanish Foodservice
2020	Global Trends Show	Spanish Foodservice
2021	QSR and Delivery wheather the Crisis	Post Covid-19
2021	Madrilenian exceptionalism	Ayuso defends the hospitality
2020	¡Re-viva España! By K. Wissman	Spanish Foodservice
2022	Catering for a evolving workplace	Covid-19
2022	100% Experiential Sports Bar	Sports Bar

Fuente: DFV Mediengruppe

Spanish Companies Profiles

Fecha de aparición	Empresa/Venue	Empresa/Venue	Empresa/Venue
2011	Bubó	Oriol Balaguer	Espai Sucre
2011	Fastvinic	Tickets	Cornelia
2011	La Boelia	Les Cols	Pera Batlla
2012	Bling Bling	Pizzetaro	La Mary
2012	Bodevici	Rocambolesc	
2013	Mercado de S. Antón	Boca Grande	Llamber
2014	Bibo	DiverXo	Ajoblanco
2014	Platea	DiverXo	Valenciana Shock
2015	Las Playas	Café del Río	
2015	Cachitos	OhBo	Sushita Café
2015	Van Van	Mercat de Mercats	MadrEat
2016	Napar	Deli-rant	Black Lab
2016	Santa Burg	Focaccela	La Lonja
2017	Punto MX	Tiradito & Pisco Bar	Astrid & Gastón
2017	Habitual	Topa Sukaldería	Bar Ri
2018	El Invernadero	Hotel Wellington	
2018	Paperboy	König	El Perro Salvaje

Fuente: dfv Mediengruppe

Madrid´s most of dinamic trend setter (2018)

Madrid's most dynamic trend setter

The young food service enterprise Grupo Larrumba is not just the fastest growing operator in the Spanish capital at the moment, but also one that is innovatively shaping gastronomic change in the 3 million strong metropolis. It has a total of 22 concepts, and its casual dining outlets are each individually designed and open all day. The range of themes includes Mediterranean, Mexican, Japanese and Indian cuisines; the overall turnover is expected to be €55 m at the end of this year.

By Mario Cañizal.

By the end of this article, you will not only have a quite complete picture of the Madrid-based Grupo Larrumba, which opened its first restaurant in 2013 and had a portfolio of 18 individual concepts in 18 locations, rather than one single brand, with an average bill of €6 to €40, at the end of 2017. In addition, the article will explain how ambitious casual dining concepts like Larrumba's are really stirring up Madrid's gastronomic scene. The full-service restaurant industry used to be characterised by fine dining restaurants, together with a wide variety of fast food suppliers, including traditional tapas bars and, often American-style, cafés. However, completely new players emerged during and after the 2007-2015 economic crisis, the reason being that customers and their demand profile had dramatically changed. People do still like table service, but now they like it all to be relaxed and affordable. And there is a desire for informal gastronomy that combines food and drink (comida y copas), i.e. restaurant and bar. These days, the new protagonists include companies such as the Grupo Tragaluz, En Compañía de Lobos, the Grupo Lalala, Grupo La Ancha or Grupo El Paraguas. And the Grupo Larrumba, of course, which makes its dining rooms into a home from home, focusing on dynamic all-day scenarios rather than static tradition, and cultivating contemporary cosiness rather than timeless formality. What is happening at the moment is more than a shaking of traditional gastronomic pillars – it is an innovative erosion.

The common denominator in these young concepts is a fantastic feel for locations. The economic crisis led to premises in highly attractive locations, 'used' by high income clientele, becoming vacant. This has resulted in beautifully designed restaurants with a harmonious ambience, often with an open bar and

Madrid´s most of dinamic trend setter (2018)

CONCEPT

Botania, PIPA&CO fish

kitchen, creative dishes, a credible ratio between price and quality, and opening times from breakfast to nightcap, frequently with background music.

At the moment, the Grupo Larrumba is showing the strongest dynamic in all of this, and arguably, the greatest spirit of innovation: in terms of design and cuisine, their restaurants play with themes that include Mediterranean, Caribbean, Japanese, Mexican and Indian, bridging the gap between beer tavern and (upscale) casual restaurant to gluten-free bakery with vegan cuisine. It is fairly clear that this bears the signature of more than one individual and that several people are driving us to try out their restaurants. The nucleus of the group is formed by Fernando Nicolas (branding) and Carlos Sainz (finance), who have previous 'monetarily lucrative' experience in the nightlife industry, as well as Chiqui Calleja (marketing). They are all under 35 years old and make a trio that has a clear strategy to continually bring in new professionals who can give the group added value. Like Gonzalo López Hermida, for example, who is in charge of the expansion, head chef Roberto Velázquez, Carlos Moreno, who is responsible for all the cocktails and architect Jorge Lozano. Almost every restaurant has its own shareholder structure. This 'construct' is held together and powered by the following principles:

- a new understanding of value added, which aims to "optimise the output, to make the most of the vision" rather than maximise profit, as Operations Manager Aitor Samperio explains. The goal is expansion of the group's solid dominance in the greater Madrid area, including consistent reinvestment of their profits.
- new operative models: "Our organisation is built as a holarchy of semi-autonomous, self-organising circles" rather than as a traditional hierarchy, says Samperio. He also calls it "organised chaos", with agile processes and bottom-up communication. In terms of menu planning, there are a few signature dishes which can be found in (nearly) all the restaurants. These are the group's visiting card.
- a new understanding that employees are "makers, who are self-guiding and see themselves as hosts who convey pleasant experiences. We want to make our customers feel good".
- dynamic menus, with up to 40 dishes that are changed at least twice a year, and key dishes that remain constant. Strongly customer-centred thinking when developing the dishes.
- open executive structures with up to 12 shareholders per restaurant.

For now, the greatest outcome of such efficient teamwork has been the simultaneous opening of seven outlets run by Grupo Larrumba, on the ground floor of the Hotel Rumbo Aravaca (Marriott) in October 2017: here the company is operating four of its own concepts (Bengala, La Sabina, Masako, Okavango) and three additional restaurants under licence (see box). The locations in downtown Madrid are also situated within a manageable radius of each other, with Larrumba focusing here on high-frequency locations in districts with a prosperous clientele. For the design of their restaurants, which mainly range from 100 to 350 sq m in size, the company put their trust in interior designers from Proyecto Singular and Foxium Arquitectura. They give each

"Almost every restaurant has it's own shaveholder structure"

Okavango

PIPA&CO

43

Madrid´s most of dinamic trend setter (2018)

Grupo Larrumba Restaurants

Brand	Opened	Theme	Seats	Ø Bill	Bestsellers
Pipa&Co	2013	fusion/ international	84	26€	veal cheeks in port wine sauce with sweet potato mash; Hindu sandwich with pitta bread and chicken tikka masala
Marieta	2014	fusion/ international	177	31€	tuna tartare, Galician sea greens and winter radish; 70° ribs (macerated in BBQ sauce for 24 h)
Juanita Cruz	2015	cocktail bar/ events	280	30€	steak tartare with matchstick potatoes; curried monkfish with vegetables
Frida	2015	fusion/ international	64	22€	fried aubergines with sweet miso sauce; spring rolls with duck, paté and pickled vegetables
Perrachica	2015	fusion/ international	294	29€	squid in its own ink with rice and poached egg; creamy rice with corral chicken and seasonal vegetables
Dray Martina*	2016	japanese street food	61	21€	chirasisushi (Japanese rice, tuna tartare and fried egg); tacos with garlic prawns and chipotle mayonnaise
Habanera	2016	Caribbean/ colonial	270	35€	fillet of beef Wellington; aubergines with sweet miso sauce
Peyote San	2017	Japanese/ Mexican	107	37€	teriyaki-style beef ribs; red tuna
Caramba	2017	Madrid tavern	100	25€	French-style mussels; grilled cuttlefish
La Sabina**	2017	Mediterranean	120	40€	lobster rice; entrecote of veal
Mamba	2017	fusion/ international	150	16€	French-style mussels; large veal schnitzel

*restyled in 2018 – now operating with its new brand name Kamikaze
**the only concept with two outlets: La Moraleja and Rumbo Aravaca

Restaurants in the Hotel Rumbo Aravaca, opened in 10/2017

Brand	Theme	Seats	Ø Bill	Bestsellers
Masako	Japanese	50	32€	black cod macerated in miso and ginger with steamed rice; tuna nigiri with fig jam and bacon salt
La Chingona*	Mexican	100	20€	wood-fired ribs of beef with three chilli sauce; tempura shrimps with chipotle mayonnaise
Celicioso*	gluten-free bakery/vegan cuisine	60	6€	poached eggs on toast with guacamole and sesame; courgette spaghetti with tomato and basil sauce
Bengala	Hindu	35	29€	chicken tandoori; lamb passanda curry
La Sabina	rice dishes	100	37€	ceviche without tuna; rice with seafood
Okavango	African	150	30€	15cm cannelloni with stewed veal hock, porcini and truffle béchamel; grilled beef kafta
La Mamona*	beer tavern	131	25€	cuttlefish balls in cuttlefish ink; grilled razor clams

*operated as a licensee. Licensors are Celicioso, Grupo Camuñas Distribución, Grupo Lalala (La Mamona)

operation a characteristic identity and, as far as ambience goes, are able to create a wholly unique atmosphere there in the day, as well as during the evening and night time. Pipa&Co, for example, has a Bohemian, Parisian feel; La Habanera has a Cuban colonial look; Marieta has elements of industrial charm, and PYT has a colourful Mexican feel mixed with Japanese minimalism. The food on offer always matches the restaurants, with typical bestsellers in each one (see overview). Average investment is €600,000 to €800,000; average turnover for each restaurant is €2 m, with an estimated €55 m turnover overall in 2018. Food sales account for 70% of this. The most successful operations are the 900 sq m Habanera, which serves up market-fresh cuisine in a setting of opulent greenery and takes inspiration for its recipes from the Caribbean, and the 800 sq m, multi-atmospheric Perrachica, located in a former bank. As for the food: "It's uninhibited and mixes recipes from all the continents."

Why do Larrumba prefer to remain as unknowns in the background rather than build a chain? On the one hand, this is because the different shareholder structures lead to ever new conceptual ideas. On the other, the focus on one city necessitates a certain diversification. Back of the house, though, as much as possible is centralised in terms of HR, marketing, design and purchasing. The numerous events are also coordinated centrally, and new projects are discussed in group plenaries. The first project for 2018 was the Restaurante Botania in the Hotel VP Plaza Design on the central Plaza de España – followed by new concepts such as Teje y Maneje (tapas & drinks), Carbon Negro (barbecue) as well as an Asian one to open in Castellana street 43. Restaurants in shopping centres, such as the Plaza Rio 2 on the River Manzanares, are another interesting topic. Being so busy and successful put Grupo Larrumba in the sights of investment funds. In August, Aurica Capital announced the purchase of a 30% share – a deal that should enable the shareholders to open as many as 25 new outlets, including outside the capital, and to work on the internationalisation of certain concepts. In other words, things are storming ahead with this breath of fresh air in Madrid. www.larrumba.com, www.rumboaravaca.com ■

CONCEPTS

Teresa Carle's restaurant in Barcelona was an instant success in 2011. For Flax & Kale, her son Jordi Barri developed the concept further, departing from the healthy veggie approach in favour of a flexitarian concept. © Flax & Kale

Flexitarian pioneers

The successful 'Flax & Kale' fresh-casual dining operations in Barcelona are deemed to be the first examples of a professional flexitarian format in Spain. The all-day restaurants have become the germ cell of further ambitious sales solutions for the visionary vegetarian, Teresa Carles, and her family.

At the time of publication, the company, operating under the 'Teresa Carles Healthy Foods' business name, runs four different concepts in six locations. In total, these seat around 800 diners, and in 2018, they accounted for an estimated turnover of €17 m – an increase of 9 percent compared with the previous year. The company's plans are hugely ambitious. An idea that more than a few people prophesied would not flourish at first is experiencing a tailwind here. Teresa Carles might like the metaphor: after all, it was she who sowed the seed in 1979 from which a flourishing chain of restaurants has now grown – not in one, but two generations.

This unassuming woman, a self-taught cook, was born in 1958. In 1979, she opened the attractively furnished vegetarian 'Paradis' restaurant, together with her husband Ramón, in her home town of Lleida. A Garden of Eden for supporters of a meat-free diet – albeit at a time when meat dominated the menus, and vegetarian concepts were doomed to a shadowy existence. But it went well, and when her two children were grown up, there was scope for big plans. Hence the leap to the Catalan metropolis in 2011. Barely 100 metres from the central and extremely busy Plaza Catalunya and a stone's throw from the world famous Ramblas, the gentle Carles invited diners to enjoy previously unfamiliar creations in a 200 sq m restaurant. The ambience is characterised by beautiful tiles, stone walls, round arches, and open shelves with fruit, vegetables, wine and oil – deliciously healthy. With her more than 30 years' experience, she composed dishes from previously little-noticed or valued ingredients, with names like 'Zucchini Carpaccio', 'Quinoa, Red Fruits & Miso Vinaigrette', and 'Tofu, Shitake & Eggplant Teriyaki', presenting them in an aesthetically pleasing way to health-conscious diners. The cry of "We love you veggie much" rang out to the city dwellers – and the full-service restaurant, seating 100 people, was full for lunch and dinner in no time.

TERESA CARLES HEALTHY FOODS

Slogan Eat better, be happier, live longer
Founder Teresa Carles, Ramón Barri, Jordi and Maria del Mar Barri Carles

CONCEPTS

Teresa Carles opened in 2011, Barcelona, 203 sq m, 112 seats, vegetarian, full-service
Flax & Kale (Tallers) opened in 2014, Barcelona, 595 sq m, 284 seats, flexitarian, full-service
Teresa's Stairway to Health opened in 2015, Barcelona, juices/sandwiches/salads/pastry, counter service
Teresa Carles opened in 2016, Lleida, 402 sq m, 123 seats, vegetarian, full-service
Flax & Kale à porter opened in 2017, Barcelona, Grab & Go, counter service
Flax & Kale (Passage) opened in 2017, Barcelona, 551 sq m, 206 seats, flexitarian, full-service
Turnover: €17 m (estimated for 2018)
Plans: 6 further 'Flax & Kale' restaurants in the near future, expansion of the delivery business; entry into retail and e-commerce sectors.
www.teresacarles.com, www.teresasstairway.com, www.teresasjuicery.com

Veggie goes flexitarian

Teresa's restaurant in Barcelona was a concept in the sun that was soon refreshed and nurtured by her son Jordi Barri. The well-travelled former management consultant and branding expert drew up a new concept of his own, which made the healthy veggie approach of his mother's restaurants the core of a rather more flexible restaurant in terms of recipes: a flexitarian approach, in other words. The menu was to consist of up to 80 percent plant-based proteins and 20 percent proteins from blue fish (oily fish). The name alone was intended to make clear what was important to him: 'Flax' stands for Omega-3 fatty acids and 'Kale' (leaf cabbage) contains the vitamins A, K and D.
For the 600 sq m outlet on the Carrer dels Tallers, just 200 metres from the Teresa Carles, interior architect Francesc Pons designed a light-flooded, multiple-use space on two floors. At the entrance on the right, guests are greeted by a refrigerated chiller cabinet full of colourful juices with stylish labels, which have been freshly pressed right in the next room. 'Flax & Kale' is said to be the first restaurant in the city working with cold-press technology instead of the widespread centrifugal manufacturing process.

The concept follows four core ideas: 'flexitarian healthy', 'tasty healthy', 'customer experience' and 'sustainability'. "We want food to be experienced here as the source of good health," Jordi Barri explains. Most of the ingredients used are regional and seasonal. Using a simple system, the menu makes transparent which dishes have been prepared with raw food (at a temperature below 48° C), which are gluten free or plant based and/or which have been prepared with oily fish. In addition, a glossary describes some of the ingredients and their preparation, and information is given on allergens. The average bill in the restaurant, which is open from breakfast to late evening, is around €25.

Growing the family business

Owing to its success, 'Flax & Kale' has become a family affair: together with two nutrition experts, mother Teresa is responsible for developing new recipes, father Ramón oversees the finances, daughter Maria del Mar is responsible for the team of around 300 employees, and Jordi takes care of strategy and marketing.
An active triathlete, it's no wonder that Jordi is also translating the family's basic idea into more and more 'disciplines'. In 2014, the family opened 'Teresa's Juicery' in the

Plants & blue fish are the basis of the Flax & Kale menu. © Flax & Kale

An open kitchen connects to the relaxed dining room at Flax & Kale (Tallers) © Flax & Kale

historical centre: a counter service formula with cold-pressed juices, cold-pressed purées, plant-based milks, activated H_2Os, smoothies, and wellness elixir shots on offer. These include, for example, the 'Energy Boost' with purified water, cucumber, raw honey, lemon, orange blossom water and bee pollen, and the 'Party Recovery' with purified water, hempseeds, strawberry, young coconut water, honey, beetroot and B-vitamins.
In 2015, the outlet was rebranded as 'Teresa's Stairway to Health': "our interpretation of a healthy fast food formula." The enterprise, with a shop window full of juices, is a cross between a healthy juice bar and a healthy eatery, with a kind of cooking island at the centre of the shop. Here there's not only the range of drinks mentioned above, but also bowls, salads, smashed toasts, soups, burgers and tacos, as well as plant-based and gluten free baked goods – sold over the counter. The Barris also sell their unpasteurised juices and other drinks, with no added sugar, online now. In addition to a completely juice-based 'Fat Burn Detox' programme, an 'Energy Boost Detox' and a 'Reboot Detox' programme can be purchased here for one, three or five days, at a cost of €33.65, €99.95 and €168.25 respectively.
In 2016, there followed the opening of another Teresa Carles restaurant – in the premises of their 'Paradis' in Lleida. This is twice as big as the first one in Barcelona. And in 2017, the family sowed their flexitarian ideology at the interface with textile retailing: With 'Flax & Kale à porter', the family has created a 'Grab & Go' variant on the first floor of the H&M flagship store on the corner of Gran Via and Paseo de Gracia, atmospherically packaged in airy white with a reduced and clear design idiom and materials such as stainless steel and wood. The transition to the fashion floor is seamless, and on the counter there's the whole range of the company's juices, as well as origin coffee that has been grown, processed and prepared with extreme care, combined to order with fresh plant-based milks. There are also packaged foods for eating on-site or to take away: whole grain sandwiches, gluten free wraps, healthy baked goods, plant-based yoghurts and raw granolas.

More pictures: www.food-service.de

© Flax & Kale

"We asked ourselves: do we repeat ourselves or do we reinvent ourselves?"

Pizza & kombucha

The second 'Flax & Kale', which was opened in 2017 as well, is also an interface project, with its home in the Yurbban Trafalgar Hotel, where the ground floor connects two streets with a passage. That said, the 550 sq m operation is in no way a copy of location number one. It has a concrete floor, open walls, dark wood, glass, and modern, often indirect, lighting. This makes the ambience of the redesigned multifunctional room distinctly more industrial, even austere. And the menu also offers new ideas in the shape of gluten free pizzas from the 'Whole Grains Oven', healthy Asian cuisine and completely new desserts, which combine blossoms or sweet potatoes with traditionally known flavours such as chocolate, vanilla and strawberry.
"We asked ourselves: do we repeat ourselves or do we reinvent ourselves?", explains Jordi Barri. The decision fell in favour of innovation. The bestsellers here are pizzas, such as 'Truffle and Funghi', 'Superfood Plant-based Dumplings' and 'The All Greens Pappardelle'. Also integrated into the restaurant is a kombucha lab, where drinks are made on the spot using a base of fermented tea – a 'Blue Mojito' with yuzu, spirulina and peppermint, as well as a 'Spicy Chai' with garam masala and ginger.
Six locations and four concepts, as well as the online juice business: growth like this is not feasible without solid nurturing (or indeed gardening in the literal sense here). In 2018, the family-owned central production plant moved from their former base in Bellcaire d'Urgell (Province of Lleida) to Bell-lloc d'Urgell, where the Barris produce, among other things, juices, snacks and ice-cream over an area of 6,500 sq m. In addition to this, there's a 1,800 sq m greenhouse. The overall investment for this amounted to €7 m and there are 40 employees working there. This provides the basis for further off-shoots, which are expected to mature in line with the following ten premises: fruit and water drinks, probiotic drinks, non-dairy, ice cream & frozen yogurts, meat substitutes, healthy snacks, cereals & graninis, healthy bars and bowls, healthy baked goods, and packaged meals.

Getting ready for retail

In Jordi Barri's vision, this is a product portfolio that should be introduced to ever broader groups of diners and buyers. Since June 2018, he's been the owner of the newly established Barri Carles Group, with a starting capital of €800,000 from the 'Teresa Carles Healthy Foods' group, and he's planning up to six further 'Flax & Kale' units in the next 18 months – all under their own direction. In addition, the delivery business is to be strengthened. This has now entered its first trial period with an external service provider at the second 'Flax & Kale' location.
And the athlete also has the retail sector in his sights: even though juices, olive oil, dressings and wine are already being sold in the restaurants, he's also conducting conversations with the retail food trade, specifically, Plusfresc in Lleida. Jordi Barri would like to make their central production plant into a kind of Country Valley. This is where, in addition to the above products, new ideas, such as lactose-free cheese, vegetable drinks and entire ready-to-eat dishes are also being developed under the 'Flax & Kale' brand name and sold through their own e-commerce channel. "Even if some don't like it, we will be developing in the direction of food manufacturing."

Mario Cañizal Villarino & Katrin Schendekehl

100% Experiential Sports Bar (2022)

© LaLiga Press Service

Designed to imitate the silhouette of a stadium: The first LaLiga Twenty Nine's unit at leisure park Port Aventura near Barcelona.

A 100% experiential sports bar

... is what the Spanish football liga calls its new theme restaurant concept LaLiga TwentyNine's, which wants to offer its fans football on various levels. Emotions play an important role. Food too. Gaming. And merchandise. The contracts for an international roll-out have already been signed.

There is no doubt. The concept no less than aspires to the Champions League of successful concepts. With confidence. The façade of the first location at leisure park Port Aventura near Barcelona is a real eye-catcher. Its half round of steel, concrete and artificial grass elements imitates the silhouette of a stadium an reflects the shape and colour of the LaLiga logo. The entrance is also special and reminds us of the tunnel "real" players usually make their way through to the playing field. The store features artificial grass elements on the floor and ceiling and incorporates video walls with football images as well as audios that complement the visuals.

Experiencing football with all your senses

Visitors, however, do not step on the green when they enter but into the "Beat Center", the concept's neuralgic centre, where memorabilia and merchandising products stir emotions and fans can have their photo taken by photo call, in their favourite jersey with a trophy in hand. People can touch the ball of season here, admire prominently positioned famous exhibits and trophies and buy the shirts and shawls of their clubs and stars. Culture and commerce galore. Further down the aisles there is a restaurant area with a bar full of plasma screens up to two metres wide, close to a group of round tables surrounded by seats reminiscent of the seats the coaches sit on in stadiums, as well as a the so-called "Multipurpose Stand" with its stand-like steps. State-of-the-art projection technology was used here to create an atmosphere similar to the atmosphere in a stadium. The perfect setting for football fans. The place where matches will be shown live and fans can cheer and whoop together. Next door, there is a gaming area.

The LaLiga concept combines an audiovisual sports experience with e-games, a stadium feeling and foodservice. It is an immersive sports experience, an experience for all things football. You can not only watch, but play yourself, you can touch, hear, see, feel and taste. It is not easy to bridge the gap between foodservice, matches and gaming and create added value not only for yourself as a company but for the guest as well. Is it working? "It seems very consistent to me," says Mario Cañizal Villarino, correspondent of this magazine and co-author of this article. In mid-May, he visited the store that opened in December 2021 and has a space of 1,000 sq m and 400 covers. Meanwhile, a second store has opened in downtown Madrid.

Strong brand, strong plans

The goal behind the concept of LaLiga Profesional de Fútbol, or LaLiga in short, is to make its in part globally known clubs like Real Madrid, FC Barcelona, Sevilla and Valencia even more accessible to their fans and offer them a thoroughly consistent and contemporary experience on all levels. Contemporary means based on innovation and technology, LaLiga clarifies. Oscar Mayo, executive officer of LaLiga wants the mix between sports, leisure and entertainment "to work abroad as well".

What does the number 29 in the name mean? Because it was in 1929 that the first football competition took place in Spain. Some might be surprised. After all, the development of restaurant concepts is not the core business of this private sports association composed of the 20 clubs and listed sports companies belonging to LaLiga Santander, the Primera División, and the 22 LaLiga SmartBank companies, the Segunda División, that manages the organisation of national professional football competitions. However it is an organisation with great ambitions considering that the Madrid-based group with a presence in 41 countries is continuously expanding and driving its professionalism and internationalisation through innovation and finances all that through the centralised sale of audiovisual rights to the matches. According to consulting firm Brand

© LaLiga Press Service

Guests enter the „playing field" of LaLiga Twenty Nine's through a tunnel.

Finance, LaLiga is the eighth strongest brand in Spain, according to Kantar Brandz, it is the group with the twelfth highest corporate valuation. LaLiga says that 2.8 billion people watched the matches it broadcast in the season 2019/2020. That nutures the fantasy of tapping new sources of income next to the sale of rights to broadcast and sponsorship money. After private equity group CVC invested around €2.67 bn in mid-2021, securing access to the Primera División's income and media rights, the football division is now focusing on pushing its clubs abroad. LaLiga wants to become a global leader in digital entertainment. The first Sportsbar store demonstrates what LaLiga has in mind exactly.

On the one hand, it means partnership. For the sports bar located close to the entrance of leisure park Port Aventura with its annual 5 million visitors, LaLiga set up the joint venture LaLiga Entertainment with the park's management and Kosmos, a computer games production company focusing on sports games. Kosmos is

The Multipurpose Stand recreates stadium atmosphere

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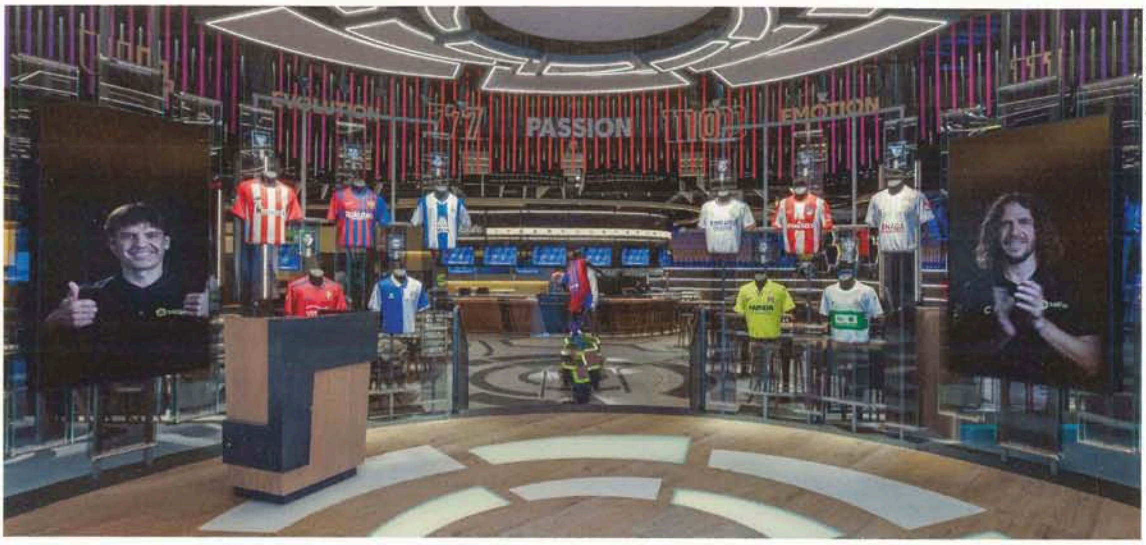
100% Experiential Sports Bar (2022)



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partly owned by footballer Gerard Piqué and offers multimedia operations through artificial intelligence solutions.
Nacho Luna and Julio Garcia Queipo from agency Komodo Comunicación are the creative minds behind the architecture and design of the €10 m project. They believed that a high recognition factor and approachability were most important. They wanted guests to be able to feel like players, who can smell the turf and experience the colours. As a contrast to the moving images on square screens, the restaurant area has chairs held in shades of grey and white, wooden tables and striking wavy shapes everywhere, whether it is the floor, the central bar or the elements on the walls and ceiling. The idea was to contrast the cool feel of technology with an atmosphere of warmth. That is why natural lighting joins the artificial one.

Food meets entertainment

Anyone, who not only wants to watch but play too and compete with others will find "passion, excitement, team sports and fun" in the e-sports area, the LaLiga website reads and beckons visitors to "enjoy the full intensity of sports". There are play stations 5 units here, where guests can play EA Sports Fifa 22 games, watch streamed events or enter online tournaments. It includes "The Beat Challenge", a football video game specially created by Kosmos, which immerses guests in an augmented reality experience. "B-eat Experience" is a premium area that can be rented for conferences and events, where guests can watch 360-degree videos of sports events while they eat. If you want to know what is playing you can check the website for information. It is mainly football but if guests want to watch tennis matches or NBA games at the same time, a solution will be found, says LaLiga. Our correspondent points out that the noise level the broadcasts create is not dominant or unpleasant.
Amid all those electronics and entertainment, what is it in the end that you are served at the 180 places in the store? The menu offers patatas bravas, hummus, jamón and nachos "para picar", in other words as appetisers, at prices between €5.50 to €17,90, sandwiches, burgers and hot dogs as starters for €13.50 to €16.90, salads for €11.50 and mains, with prices for a pasta dish at €11.50 and an entrecôte for €22.50. "The food's quality exceeded my expectations. Value for money is convincing," says Cañizal Villarino. Desserts cost up to €6.50. Prices are more or less on the same level as all other prices in the leisure park. The drinks menu includes long drinks, cocktails and Sangria. According to LaLiga, every sports bar will have its own local menu. In Port Aventura,

At the 'Beat Center' customers can participate in quizzes about the Spanish football league (Madrid).

you will find many Tex-Mex dishes while in the Spanish capital they will serve "more urban" creations. Foodservice specialist wanting to know more about figures, best-sellers, the ratio of food to drinks and sales, will have to wait. According to LaLiga, there are not enough reliable numbers yet. By the way: Anyone who wants to enter the restaurant, does not necessarily have to pay the park entry, because the outlet is also accessible from outside the park.

More than a tourist destination?

LaLiga wants its sports bar to attract not only leisure park visitors but also hotel guests and local tourists as well as weekend travellers from Barcelona. Current bookings lead the group to believe that business will be excellent this summer. There is also great response to the "Diner around" campaign, which allows guests of the leisure park hotels to eat at restaurants in the park instead of the hotel.
The new sports bar in Madrid, which opened in mid-May on the busy Gran Via 53 shopping street in cooperation with Aramark, is focusing on tourists as well as on local football fans. Aramark is a partner with experience in running theme restaurants and stadium catering, including nine Primera División arenas. The 600 sq m restaurant has 180 covers and allows Aramark to "strengthen its leading position in the field of leisure and sports",

says Jaime Thiebaut, president of Aramark Spain. He believes that working together with a brand as strong and globally present as LaLiga is a strategic step that goes beyond the opening of the first joint store in Madrid.

Downtown, everything seems a bit narrower than in Port Aventura. Nevertheless, the individual areas remain the same, even if some of them are divided up a little differently. The menu offers dishes for all tastes, says Aramark: tapas as well as dishes to share. Plus bocadillos, sandwiches and pasta dishes. There are also burgers and pizzas - as well as vegetarian and vegan offerings or smoothies. Plus menus for children. Javier Tebas, president of LaLiga, says he is pleased to welcome "Madriders and thousands of tourists" who visit the Spanish capital "in these innovative spaces," which offer a unique unity of experience, emotion and entertainment.

And they will not be the only ones in the metropolis: a next location is scheduled to open in the centre of Puerta Sol in Madrid, in the new football museum "Legends". A further four bars are expected to open in 2022. LaLiga is looking to inner-city locations with high footfall for the stores, which will be mainly franchise, as well as airports, hotels, luxury cruiser liners and leisure parks. Club stadiums are also being considered as possible locations. LaLiga has signed an agreement with Barceló Hotels Group for the concept's international roll-out, with sports bars slated to open in Africa and the Middle East.

It remains to be seen if these ambitious visions will succeed in the future. Earlier attempts to open theme restaurants in Spain that are based on the US model did not have lasting success. At one point, family owned Matas Arnalot group was running 25 franchised sports bars in Spain but similarly to the "Locos por el Futbol" stores, they hardly ever survived beyond the end of their contracts. LaLiga TwentyNine's is also facing competition, especially from the roughly 50,000 bars and cafeterias that pay for the right to broadcast league one and league two matches. These venues places are familiar places for many Spaniards, where they get together to watch the matches. Whether the new modern sports bar concept has the potential to work as a local for fans or will rather be a one-off location for tourists will depend on what customers think of the leisure factor, entertainment and food-service quality offered and that the individual parts of the formula do not cannibalise each other. One of the definite advantages the concept has is the strength of the LaLiga brand, the high affinity young people have to digital and the desire for new experiences and community in post-Covid times. All these factors raise the hope that this concept will be sent into extra time. ◆

Mario Cañizal Villarino & Katrin Schendekehl

Chronicles of the Annual European Food Service Summit 2000-2010

5

En la etapa considerada, tras sucesivas ediciones anuales, la convocatoria de la Summit caminó hacia la celebración de su 20 aniversario, en 2019, año en que se comienza a preparar la toma decisiones para un nuevo escenario y donde los efectos de la pandemia, además de las 20 ediciones, también se tendrán en cuenta.

Mientras, la Summit mantiene su esquema de desarrollo, pivotando sobre los ejes de aportación de datos para pronósticos, por parte preferentemente de la hoy Circana, estudios de prospectiva y "profecías" por medio de expertos en cambio social y sociológico, complementado por la preocupación de la incidencia de lo digital en el cliente final. Se mantuvo, como en ediciones anteriores la presentación de empresas con casos de éxito, fueran o no de Europa.

Destacar que, se venía de 50 meses en que los datos de NPD-CREST no arrojaban optimismo, pero ya en 2017 se lograría que las ventas de los TOP100, presentados por Gretel Weiss, ofrecieran las mejores cifras de los últimos 8 años.

Fue una etapa además, de la consolidación de marcas como Eataly, Dean&David, Nando´s, Le Pain Quotidien, Sticks´ n´ Sushi, Big Mamma... que llegarán muy fortalecidas, en general, hasta nuestro días; si bien por ejemplo Vapiano o Jamie´s Italian comenzarán a entonar su particular canto del cisne o Eat Out dejará de tener a Ignasi Ferrer como CEO; voz autorizada (miembro del think tank) en los Summit desde sus primeras ediciones, que se escuchó con respeto, además de agradecerles, sus organizadores, su talante y talento para moderar reuniones y por supuesto, dictar conferencias de sumo interés.

Con la celebración del 20 aniversario se comienza a conocer datos de forma más o menos oficial, sobre la retirada de los componentes del triunvirato organizador de los programas y cambios en la composición de los miembros de think tank que tenían como asesores.

Pese a ello, el nivel profesional, la misión y visión de las siguientes Summit no han bajado de nivel y sólo la pandemia pudo alterar a partir del 2021 lo que era una cita ya clásica para directivos del sector foodservice en Europa; que percibieron ya en esas ediciones ulteriores a la vuelta a la normalidad, cambios que se avecinaban; el de la sede (de Zurich a Ámsterdam) será el más perceptible.

Destacar de nuevo el interés por las empresas españolas que cada año, hasta la pandemia, estarían en el programa de conferenciantes tal como se resume a continuación:

Año	Nº Summit	Empresa/ Grupo de Restauración/ Entidad	Participante en las sesiones como orador o panelista
2011	12	Pollo Campero*	Guillermo Durán
2012	13	EAT OUT	Ignasi Ferrer
2013	14	Restalia-100M	Virginia Donado
2014	15	AENA	José Mª Fernández Bosch
2015	16	Reimagine Foods	Marius Robles
2016	17	Nostrum	Quirçe Salomon
2017	18	-	-
2018	19	Livit, Flax&Kale, VIPS	Benjamín Calleja, Jordi Barri, Enrique Francia
2019	20	Oilmotion	Carles Tejedor

Fuente: dfv Mediengruppe

En cuanto a las Summit, se reseña el lema de cada año de celebración, si bien en 2020, con motivo de la pandemia, se sustituyó por una serie de Digital Talks.

Contenido: Summits Chronicles

Fecha de Aparición	Título	Contenido
2011	12	Love Trust & Local Relevance Anexo: Why the owner makes the difference
2012	13	Creative Strategies for Tougher Markets
2013	14	Sunshine Summit
2014	15	Think like yours Customers¡
2015	16	Exploring the New Economic Landscape
2016	17	Navigating through the Digital Storm
2017	18	Communityship Connectivity
2018	19	Change Technology and the Human Factor: Will our industry have to re invent itself?
2019	20	The Future Awaits!
2020	21	Crisis Consecuence Confidence
2021	22	Back to the Future: Strengthening up&Striving Forward. Seizing New Opportunities
2022	20th	A Pionnering European Adventure

Fuente: dfv Mediengruppe

(*) Las crónicas/resúmenes de las Summit 13th y 14th ya no se publicaron en la revista FSE&ME pero pueden consultarse en www.food-service.de

(**) No suele coincidir con el de la convocatoria y/o programa al titularla con lo que fue más representativo del evento una vez realizado.

Se seleccionan para su lectura en este contexto los siguientes reportajes:
- A Pionnering European Adventure
- Change Technology and the Human factor
- Back to the Future: Strengthening up& Striving Forward. Seizing New Opportunities.

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.

© Thomas Fedra

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.

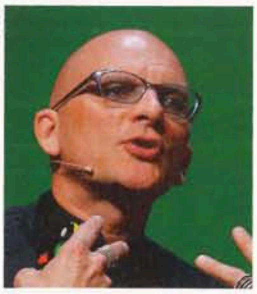
We will never forget the first – and amazing – appearance of Russia's Rostislav Ordovsky-Tanaevsky Blanco on stage in 2003, when the founder of the leading Russian foodservice group Rosinter made no effort to conceal that – and why – the company had been in difficulties more than once. Nor will we forget when, in 2011, Nadine Beshir from Egypt talked about her coffee bar project in 2011 during the Egyptian revolution. It was moving, an emotional highlight. Another exceptional highlight is *food*service'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 *food*service and its international sister magazine *food*service 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 onto the advisory board. Their task was to identify relevant issues and hire qualified speakers. Quality manage-

A pionnering European adventure



Kjell Nordström

Nadine Beshir

Howard Schultz

Eureopan business leaders discuss topical issues that are currently on the industry's agenda.

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***

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 forgotton 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.

www.efss.ch
Be There For a Better Outlook For Your Company
Format:
National experts and global players from all over Europe and the United States present their views of the future. Leaders interview leaders. Networking.
Pierluigi Collina
Elif Shafak
Clive Schlee
Chris Sanderson
Target group:
Entrepreneurs and top-level managers – restaurant chains, contract caterers, suppliers etc.
Visionary insights for future-minded players in the away-from-home industry.
Conference language:
English
Participant fee:
CHF2,600 for restaurant companies (early booking by 15 July 2018: CHF2,210)
CHF3,750 for suppliers/consultants (early booking by 15 July 2018: CHF3,180)
Booking:
www.efss.ch
Information:
brigitte.fischer@gdi.ch
Phone +41 44 724 62 66
19th European Foodservice Summit
Think Tank and Congress for the Restaurant Industry
Innovative Restaurants, Thriving Cities, and Human Happiness
Joint organizers:
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BOSTON UNIVERSITY
Food Service Europe & Middle East
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2018: Setting a Course for a New Horizon

Mette Lykke

Jérôme Tafani

Jordi Barri Carles

Benjamin Calleja

19th European Foodservice Summit

Think Tank and Congress for the Restaurant Industry

Herculano Rodrigues

Pierluigi Collina

Kavi Thakrar

Bites for Thought

- The "New Industrial" core will be made up not of factories (stuff being made), but of data centers (stuff in bits and bytes), distribution centers (stuff to buy and deliver) and urban agricultural centers (stuff to grow and eat).
- Post-industrial societies are no longer homogeneous groups of people but individuals of many types and desires. The coming marketplace will not be like a smooth alloy in a melting pot but more like chunky ingredients tossed together in a salad bowl.
- When you enter a restaurant you enter the brand, and that brand is reflected by the faces of its employees.
- You cannot hire someone who can make sandwiches and teach them to be passionate, but you can hire passionate people and teach them how to make sandwiches.
- While no one wants to work during a crisis, a crisis can become a great opportunity… as long as you survive.
- Innovation has to be a cultural value across all levels of the restaurant organization, not a stand-alone department.
- A customer's first impressions really matter – so design matters, music matters, lighting matters, and smell matters in creating a great first impression.
- Your business can be smart or not so smart, healthy or unhealthy. It is best to be smart and healthy.
- Increasingly technology is changing the rules, today the "Referee" is becoming a "Robocop" able to track results and correct mistakes instantly.
- Restaurant food waste is too important to ignore, we need to find ways to "eat everything on our plates."
- Delivery is instant gratification, for the customer and the restaurant. But delivery, if not managed, is like a plague infecting full-service restaurant operations.
- Smile, a sense of humor is a business asset.

SUMMIT

Will our industry have to re-invent itself?

Change, technology and the human factor. These were the leitmotifs of the 19th European Foodservice Summit that took place in Zurich on 25 and 26 September 2018. Flavia Fresia reports.

More than 250 foodservice professionals from 32 nations were treated to two days packed with data, ideas and insights into the rapidly shifting landscape of the restaurant business. A business increasingly impacted by technology and artificial intelligence (AI), driven by changing behaviours and demands on the part of the consumer, but still fundamentally coloured by the persistent need of humans to meet, share, and experience. A business where the quality of the interaction between staff and consumers is still the key for success, but where technology can make this interaction easier.

The big picture

David Bosshart, CEO of the GDI Gottlieb Duttweiler Institute for Economic and Social Studies in Switzerland, drew a picture of times to come. He delineated a global urban world depending on infrastructures (e.g. fast travel links) and powered by technology and unlimited connectivity thanks to mobile devices, Cloud, Internet of Things (IoT) and AI. The advent of 5G, he predicted, will accelerate these trends.
According to Bosshart, we will have hugemetropolitan areas where different groups of people will not blend together as in a melting pot, but keep their identity as individually recognisable chunks in a salad bowl. He predicted an urbanscape with urban agricultural centres, cultivating food to feed people as cities grow larger and as we head towards a "meatless future".
Gretel Weiss, publisher of FoodService Europe & Middle East, presented the ranking of Europe's Top 99 Restaurant Operators, outlining trends, challenges and growth factors. With combined sales of €114 bn they achieved sales growth of 6.6%. She analysed a few particularly successful brands, such as Nando's and McDonald's Europe, and identified the key to their achievements as the ability to create a strong company system, culture and image: "When you enter the restaurant, you enter the brand," she summed up.
According to **Herculano Rodrigues**, associate director, Javelin Group, Accenture Strategy, to be successful in the future, retailers and developers will have to empower the customer by giving them control over experience. They will need to embrace disruptive technologies such as robotics/drones, IoT and AI. In a nutshell, they will have to adopt new or reinvent existing business models to stay relevant. He went on to illustrate a few examples of innovative F&B business models, including the TimeOut Market in Lisbon, which hosts 40+ diverse f&b venues under one roof; or operations that mix sports activities, street food and so-


Mette Lykke | Jérôme Tafani | Benjamin Calleja | Jordi Barri Carles

cial experience, e.g. the "Crazy Golf Club" Swingers in London.

Power to the people

Adam Jones, at that time CFO at Pret A Manger, told the audience how the group identifies, tests and implements innovations by engaging with their customers. An example herefore is the way the Veggie Pret brand was developed. Pret also considers their employees to be "the most important ingredient" in their business. By choosing passionate people, paying them generously, offering attractive career paths and empowering them in their interaction with customers (for example, by allowing them to give away free food or coffees), Pret creates an environment where happy staff make customers happy. **Enrique Francia**, CEO of Grupo Vips, recounted how the privately-held group – an integrated business comprising restaurants, coffee shops, a sandwich and salad factory – was able to weather the economic storms that battered the Spanish foodservice market in the last decade, by going through a deep transformation. The process comprised a detailed plan of action aimed at: streamlining operations, achieving efficiency and simplicity in all areas, and changing the company's organizational culture. The result: a more efficient and more customer-oriented business. "Empowerment and accountability at store level are the last mile for being a great foodservice company and the most difficult to achieve," he revealed.

Kavi Thakrar, co-fouder of Dishoom cafés, described the particular ethos behind the concept, which was inspired by the old Irani cafés of Bombay – places where "a genuine love of people means that anyone and everyone is welcomed with warmth. You're always amongst friends." Dishoom recreates a world that "believes in generous, genuine and selfless giving," he said. "We call this Seva. Seva goes beyond service. Seva means that in our world we don't just serve people, we take them in and look after them to the very best of our ability. Guests and team alike".

Embrace change

Technology is here for good, the future is now, admonished **Benjamin Calleja**, CEO of Livit Design. He predicted that in restaurants, technology and operations will merge, though the customer will not be aware of it. He went on to describe 18/89, the restaurant his company opened in Stockholm in 2017: the whole guest experience and operational efficiency are powered by AI and machine learning. A sort of test lab for how pioneering but already available technolo-

More than 250 foodservice professionals from 32 nations were treated to two days packed with data, ideas and insights into the rapidly shifting landscape of the restaurant business.


Chris Sanderson


Kavi Thakrar


Enrique Francia


Herculano Rodrigues

SUMMIT

Joint organisers, hosts, and also on stage at the European Foodservice Summit as speakers and moderators: Dr. David Bosshart, CEO of the GDI Gottlieb Duttweiler Institute, Rüschlikon; Gretel Weiss, Publisher FoodService Europe & Middle East (dfv media group, Frankfurt); and Chris Muller, Professor at Boston University.

Brigite António, Marina Duarte, Marina Costa, Portugália Restauração

Mario C. Bauer/Andreas A. Karlsson

Organisers & partners

Organised by FoodService Europe & Middle East, the Gottlieb Duttweiler Institute (GDI) and the University of Central Florida, the European Foodservice Summit has long been widely acknowledged in the sector as the top event for a discerning audience, for both the comprehensive industry insights, and the networking opportunities it offers during the coffee and lunch breaks, the get-together on the eve of the event and the dinner party that rounds off the first day, hosted by Marché International at their Palavrion Urban Grill in downtown Zurich.

The 19th Summit was supported by nine Educational Partners: Arla Pro, CSM Bakery Solutions, Ecolab, Fourth, Nestlé Professional, Salomon FoodWorld, Symrise, True Refrigeration and Winterhalter.

The 20th European Foodservice Summit will be held in Zurich on (23) 24 and 25 September 2019. The programme will be issued in spring 2019. Further details can be found at www.efss.ch.

gies could help operators run a restaurant more efficiently and profitably.

Jordi Barri Carles, founder of Flax & Kale, grew up in his parents' vegetarian restaurant. When striking out on his own, he set out to lead, transform and grow the category of healthy eating. Based on his analysis of what defines healthy food and a smart concept, he created a "healthy flexitarian" formula that is centred on customer experience, convenience and sustainability and provides food and drinks that are both tasty and healthy: high on nutritional value, low on fats and sugar.

Chris Sanderson argued that we are living in a transformation economy, and food is at the head of the change. Customers are actively searching for goods, products and services that make them happier, healthier and wealthier as human beings – both now and in the longer term. They are also abandoning traditional eating habits: already, vegans are on the rise. Future mindsets will be driven by convenience and by the wellness economy. Sanderson also identified two core minority groups that are set to grow and infect the mindset of mainstream consumers in the future: the Fastronomic Foodies, who associate food with convenience and quality; and the Upstreamists, who reject fad diets and treat food as nourishment.

The human factor

Pierluigi Collina is a former football referee, who was nominated "World's Best Referee" for six years running. He is currently the chairman of the FIFA Referees Committee. Collina gave the audience insights into decision-making under pressure. Technology increasingly comes into play on the football field as well. It

Change Technology and the Human Factor

Good mood at the dinner party that rounds off the first day, hosted by Marché International at their Palavrion Urban Grill in downtown Zurich. Party members amongst others: Michael Weigel, Stefan Weber und Henry McGovern.

helps referees to prepare in advance and to take better decisions in a matter of seconds on the field. A lesson for restaurant managers.

Jérôme Tafani, CEO of Burger King France, talked about his recipe for growing the brand, which was re-introduced to the tough and highly penetrated French fast-food market in 2013. Tafani graphically illustrated the actions taken to position the brand, to build customer awareness, engagement and attachment, and to carve a strong image. All this was accomplished with a small marketing budget, exploiting the immediacy and quickness offered by social media. "To exist, we need to be different," he said.

A challenge is a challenge

Mette Lykke, CEO of Too Good to Go, illustrated how, for restaurateurs, food waste can not only be a cost factor but also an opportunity. Too Good To Go is an app that connects restaurants, bakeries and supermarkets with consumers. The mission: to find a buyer for (discounted) unsold food at the end of the day. The goal: to reduce waste and help the environment. The results: over seven million meals 'saved' from the waste bin and enjoyed by people at an attractive price. And for restaurants: the opportunity to sell their food, reduce waste disposal costs and even attract new customers. A win-win situation.

Consumers want convenience and delivery provides instant gratification. However, delivery changes the customer's relationship with the restaurant, warned **Chris Muller**, co-host and professor at the Boston University School of Hospitality, in a spontaneous speech. "Delivery is like a plague infecting the full-service restaurant business," he declared. "We have to stop thinking of delivery as a bonus, look at how it is actually hurting us and find a new way to consider the delivery business model." Restaurants are best at providing high quality, service and the experience, but when competing on time and delivery, restaurants are giving away what they are good at: "This is a challenging time, because we are giving up too much of our identity," concluded Muller. ■

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Key Summit learnings*

1. Even the restaurant world is being affected by rapidly changing technology. The new Internet infrastructure of a 5G high speed data transfer means that the "New Industrial" core will be made up not of factories (stuff being made), but of data centers (stuff in bits and bytes), distribution centers (stuff to buy and deliver) and urban agricultural centers (stuff to grow and eat).
2. Post-industrial societies are no longer homogeneous groups of people but individuals of many types and desires. The coming marketplace will not be like a smooth alloy in a melting pot but more like chunky ingredients tossed together in a salad bowl.
3. When you enter a restaurant you enter the brand, and that brand is reflected by the faces of its employees. In the best restaurant brands it is those employees who build experiences that people truly love.
4. It will always be true that you cannot hire someone who can make sandwiches and teach them to be passionate, but you can hire passionate people and teach them how to make sandwiches.
5. While no one wants to work during a crisis, a crisis can become a great opportunity… as long as you survive.
6. Innovation has to be a cultural value across all levels of the restaurant organization, innovation is not a stand-alone department in an organization but happens in every department.
7. A customer's first impressions really matter – so design matters, music matters, lighting matters, and smell matters in creating a great first impression.
8. Your business can be smart or not so smart, healthy or unhealthy. It is best to be smart and healthy.
9. Increasingly technology is changing the rules, today the "Referee" is becoming a "Robocop" able to track results and correct mistakes instantly.
10. Restaurant food waste is too important to ignore, we need to find ways to "eat everything on our plates."
11. Delivery is instant gratification, for the customer and the restaurant. But delivery, if not managed,is like a plague infecting full-service restaurant operations.
12. Smile, a sense of humor is a business asset.

*Compiled from Chris Muller's summing up at the end of the event.

Meeting in person again: Europe's hospitality industry

Boris Tomic, Andreas Karlsson and Walter Seib

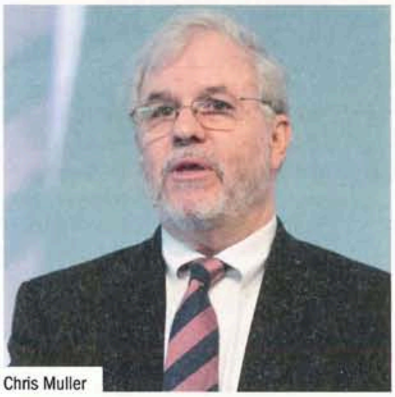
It is safe to say that the issues the international foodservice community discusses at the European Foodservice Summit are issues that set trends. And that was the case again in early October, when the EFSS took place for the 22nd time.

Gretel Weiss

Photos: Thomas Fedra

At this year's European hospitality event, industry players were able to get together in person again. The event's motto was "Back to the Future: Strengthening Up & Striving Forward – Seizing New Opportunities". As is the tradition, Prof Chris Muller summed up all the learnings at the end of the European Foodservice Summit (EFSS) and provided the industry with an outlook, food for thought and with homework to do in the coming months.

Katrin Wissmann



Chris Muller

Richard Bergfors

Henry McGovern

More pictures:
www.food-service.de

1 "Ephemerality" I Click, click, click... There will be no return to normal because it was preciously the normal that was the problem. David Bosshart, president of the G. und A. Duttweiler foundation, gave a speech on issues like the influence of digitalisation and what the consequences are.

2 Daily life has changed the way we feel about restaurants. If a restaurant wants to stay relevant it will have to be useful, high-quality and convincing.
When Gretel Weiss, co-founder and publisher of *food*service Europe & Middle East presented the latest ranking of the top European foodservice chains, she pointed out how important it is to bring service back to restaurants again.

3 Let's make the future better! The key to personal success: visionary strength and creativity, good leadership and economic thinking.
Katrin Wissmann, executive director of *food*service Europe & Middle East, presented the exclusive findings of the "Experts' Vision Board" to summit's participants. There is no way back, answers will have to be found in the future, not in the past.

4 Executives are cultural ambassadors.
Oleg Pisklov, CEO of KFC Europe, Russia and CIS, talked about employee appreciation and support and the success his company has despite Covid-19.

5 Broaden your horizon I Speed up expansion.
David Baumgartner, the founder and Continuous Improvement Officer of German healthy food brand Dean & David, gave in-depth insight into what happened in the past 18 months of the Coronavirus crisis and also offered up an outlook. He went through the absolute worst-case scenario and changed his business model completely.

6 Give your leadership a growth mentality leadership I Lead with agility.
Marta Pogroszewska, Managing Director of Gail's Bakery, stressed how important it is to invest in staff. If you invest in your employees, you invest in your company.

7 Product innovation, digital innovation, image innovation I Some 70% of employees are specialised in IT.
Aslan Saranga, Group CEO of Domino's Pizza Eurasia, made clear that it is not creativity you need to be innovative. It means learning from others, it is a skill you acquire.

8 Personal modesty, professional willingness I Kindness is the new religion.
Clive Schlee, chairman of Itsu and former Pret CEO, raised the question: "Who knows the names of the people who clean the building?"

9 Going beyond zero and becoming "climate positive" I Getting the carbon out of the atmosphere I Be a hero before breakfast.
Richard Bergfors, CEO of Max Burgers, drew attention to the fact that there is a crisis that is even bigger than the Coronavirus crisis. It's the climate crisis. Bergfors talked about the steps his company is taking.

10 Pizzas are not burgers. Prof Chris Muller put the spotlight on two classics – the pizza and the burger. He took a look at what they have in common, what distinguishes them and the opportunities they offer.

11 Think like an "activistic" investor. Why should we subsidise an industry we would have to tax?
August Lund used to be an investment banker. Now he is a climate activist and the co-owner of Copenhagen Food Collective.

12 Do we still have to spend money on digital technologies? Internationalise, digitalise, scale.
Henry McGovern, AmRest founder and now also an investor, says that the answer to that question needs to

EFSS 2020

Oleg Pisklov

Marta Pogroszewska

Joschka Fischer

« We have reached the boundaries of our planet. We are under extreme time pressure!»

Joschka Fischer

be a definite yes. If a company wants to attract profitable investment, it needs a concept that can be rolled out internationally, that can be digitalised and scaled.

13 It will never be the same again.

Jochen Pinsker, Senior Vice President of Foodservice Europe, npdgroup, revealed the latest figures, trends and developments.

14 You need to be an agile employer I Improve the industry's reputation.

These are the conclusions drawn by the panel discussion with Boris Tomic, Chief Editor in Chief of dfv Hospitality Media, Andreas Karlsson, CEO of Sticks'n'Sushi, and Walter Seib, CEO of HMSHost International.

15 If employers have an authentic appearance and attitude, they will be perceived as filters and as magnets.

Chesran Glidden, head of B2B at employer rating platform Kununu, believes that it is important for companies to scrutinise their external perception as an employer brand. Would you enjoy working in your own company considering its representation in social media and on its website?

16 Biodiversity is the solution.

Urs Niggli, the former director general of Swiss Research Institute of Organic Agriculture, stressed that biodiversity will solve the world population's food problems. He urged restaurateurs to waste less food and put more plant-based products on their menus. ◆

Ilona Renner

Major *Show Dates*

Ambiente, 11th to 15th February, 2022, Frankfurt, Germany

Ambiente is and remains the largest and leading consumer goods trade show in the world. It appeals to an international trade audience with decision-making authority. The event's diverse character is reflected in the range of suppliers and buyers. Structures that are dynamically adapted to current developments generate synergies in each of the product areas – Dining, Giving and Living – which together cover all relevant themes. And in terms of sourcing, Ambiente is the largest platform outside Asia. For 2022, more than 2,400 exhibitors from 74 countries have confirmed their participation. Exciting perspectives are opening up again for exhibitors and trade visitors in the Dining, Giving and Living areas with high-calibre contacts in person, the latest developments in the market and in design as well as trends and opportunities in all segments.

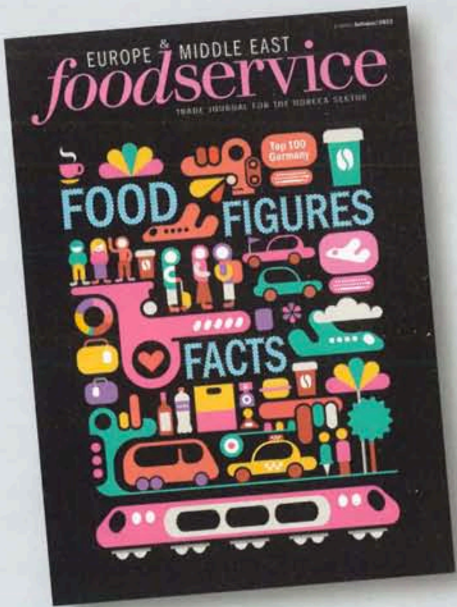
The current policy decision of the Hesse State Government sets out from Monday 22th November 2021 regulations inter alia for events which reflect the hospitalisation rate. At the moment this would mean "2G" rules for Ambiente (admission only for participants with proof of vaccinated or recovered status).

www.ambiente.messefrankfurt.com

Gulfood, 13 to 17 February 2022, Dubai, UAE

As the undisputable annual industry event, Gulfood 2022 will once again set the pace for high-volume business sourcing, new food & beverage launches, powerful distributor partnerships, start-up innovations and action-driving conversations on ensuring a strong, seamless global supply of food in a new context. The momentum of doing high-value business, swapping and networking face-to-face is greater then ever. The show will unveil digital and breakthrough innovations in a critical year for the F&B industry. Connect with top buyers and leverage the power of face to face meetings.

www.gulfood.com



Loads of content – including rankings, market analysis, technology & concept trends, expert interviews and much more: our 150+ page-strong **print edition** will henceforth run under the title foodservice international.

european foodservice summit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The place to be every September: the **European Foodservice Summit** in Zurich – great programme, expert speakers, fantastic atmosphere and excellent networking opportunities!

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V-Log

What's hot in foodservice? Starting in October 2022, Executive Editor Katrin Wissmann will host foodservice professionals from around the globe and **talk** about the latest industry trends and hottest F&B concepts in their respective cities and regions.

FOOD Bites SERVICE
International News for the HoReCa Sector

NEWSLETTER
March 31, 2022

STARBUCKS UK | FINANCIAL YEAR 2021

Total revenues up 35 percent

Starbucks UK Coffee Company reports on the continued recovery from the impact of the COVID-19 pandemic. **more**

EXPERT OPINION | CARL'S JR.

Three key ways to success

Arturo Perez, SVP, International Marketing at Carl's Jr., on future challenges and success strategies of QSR brands. **more**

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FOOD SERVICE
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Market Analysis

6

El comportamiento del sector del foodservice en Europa, desde el punto de vista de la demanda, fue seguido de forma muy precisa, gracias a la estrecha colaboración con NPD-CREST (hoy Circania) que, para los cinco principales países europeos entre ellos España, aportó información valiosa, en especial a nivel de sus tres indicadores más conocidos: ventas, ticket medio y tráfico.

Hubo mas institutos de mercado como Technomic o el propio GDI que también colaboraron en aflorar información y conocimiento del mercado de foodservice a nivel europeo y universal.

Gracias a ellos muchas empresas pudieron enderezar sus planes estratégicos al poder comparar su evolución con la media del sector y otras métricas, cuyo nivel de representatividad y verosimilitud las hacía totalmente necesarias, con el fin de conocer el comportamiento de una clientela cada vez más voluble y dependiente de la irrupción de las RRSS y lo que ello implicó.

Se han seleccionado los siguientes reportajes mediante mail a www.dfv-archiv.de

Contenido: MARKET ANALYSIS

Fecha de Aparición	Título	Contenido
2011	Far From Homegeneus	Datos de 5 países UE
2012	Modest Prospect with some bright spots	Datos de 5 países UE
2015	Coming out the other side	Datos de 5 países UE
2016	Fast Casual Is the Winner	Fast Casual
2016	Snacking: Little and often	Snacks en países UE
2017	Global diversity and common trends	Datos de 5 países UE
2018	More similarities,some surprise	Datos de 5 países UE
2019	Global market trends	Datos de 5 países UE

De ellos se reproduce en estas páginas: *“Fast Casual Is the Winner”*

Social and demographic change is strongly accelerating developments in the foodservice business. Change is being triggered, among other things, by the increasing proportion of single households, by enormously rapid technological progress, and by longer life expectations – but also by youth unemployment. Fast-casual restaurants, retail markets and supermarkets, bakeries and delivery services are benefiting in particular in the out-of-home market.

Source: The NPD Group Inc.

Fast Casual Is the Winner

Positive statistics for the industry were presented by Jochen Pinsker, Senior Vice-President Foodservice Europe of The NPD Group, at the 16th European Foodservice Summit in Zurich for the Big 5 countries, with a total of 320 m people in Europe – Great Britain, Spain, Germany, Italy, and France. Over the period of January to August 2015, for the first time in seven years, expenditure by consumers showed a significant rise compared with the same period in the previous year, by 1.4% to €184 m. After seven years in which the trend was downwards, the number of visits is likewise pointing in a positive direction. From January to August 2014 the market-research company recorded 34.9 m visits (up 0.2%).

Pinsker explained why frequency figures had not gone up even further: "A major impact in the foodservice business comes from 'homing together with e-commerce.' That means that a part of our social life is shifting into our own four walls. Nowadays people are spending more time at home again and inviting friends." The new motto is: cooking together instead of going out, play consoles instead of billiards, BBQ instead of beer garden, TV instead of cinema. Purchases, too, can be made more simply at home online.

The share of restaurant visits created by shopping trips is falling, from 23% to 21%. The only service to benefit from homing and e-commerce is delivery service. Ordering a pizza or a sushi is only a mouse click away. Food is delivered just as conveniently as books or clothes.

"When it comes to selection, ordering, payment and communication, guests' attitudes are influenced by technological progress," says Pinsker. By the end of 2015 it is estimated that consumers in the Big 5 countries will have spent €8 bn on delivery services, and thus €0.2 bn more than in 2014. The losers in the process in particular are classical fast-food and take-away providers, plus casual-dining players.

Vital and ever more important criteria when selecting a catering concept, according to the analysis by the NPD Group, involve the quality of the products. Currently 41% of guests choose a restaurant on grounds of product quality. A major buzzword in this context: premiumization. Socialising, too, is becoming more

Fast Casual (FC) has been THE success story across all European countries

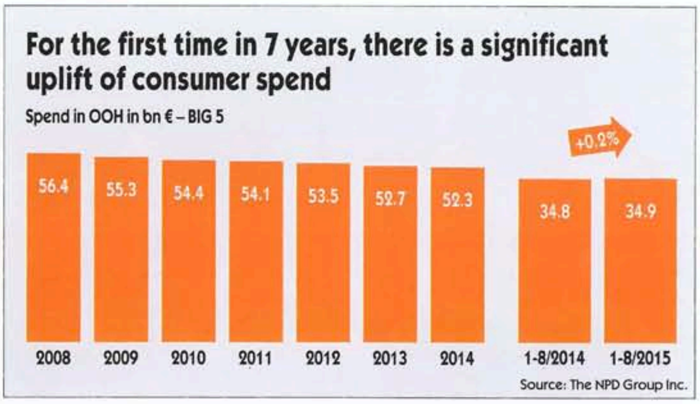
FC: 15%+ growth in visits 2009/2014

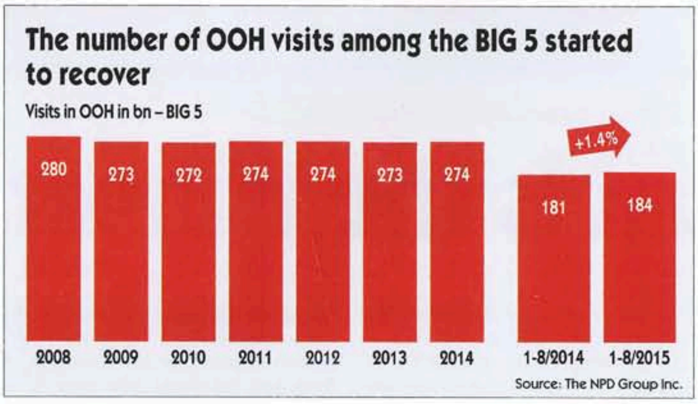
Success factors:
- Fresh ingredients
- Open kitchen/Front cooking
- Customization of meals
- Focus on health
- Atmosphere (entertainment/fun)
- Value for money
- Value for time

Source: The NPD Group Inc.

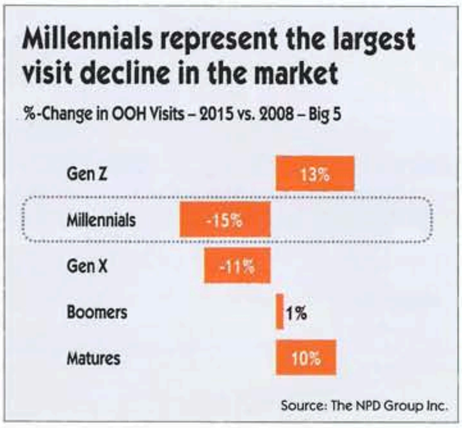

Vapiano

Fast Casual Is the Winner





important. It motivates more than 30% of guests to visit a restaurant. Atmosphere and ambience play a central role.
The greatest beneficiary from premiumization is fast-casual. The number of visits in this sector grew by 15% compared with 2009. The factors in this success include: fresh ingredients, open kitchen and front cooking, customisation of dishes, focus on health, atmosphere, price-performance ratio, and the time factor. As an example Pinsker points to the burger market. While classical fast-food providers are losing out, (fast-casual) burger concepts are gaining ground. "Over the past years, we have seen people trading up when seeking for more experience-driven visits," Pinsker explains.



Nowadays people are spending more time at home again and inviting friends.

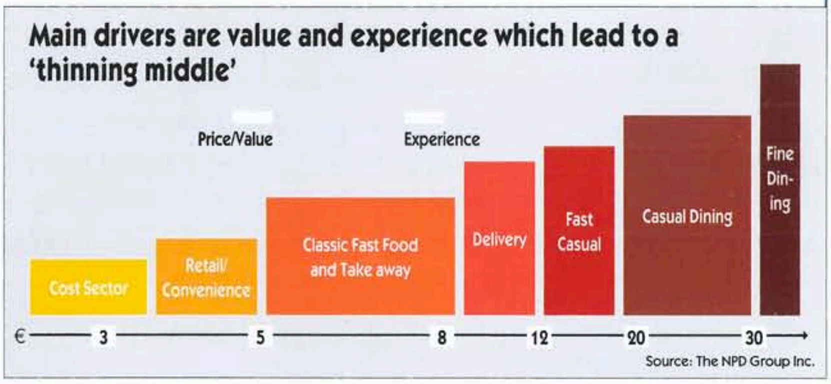
A major problem is posed by rising youth unemployment, e.g. in Spain, Greece and Portugal. In the Big 5 countries over the last seven years, when it comes to visits in the out-of-home market, the greatest decline has been seen in the millennials (people aged 20 to 34, down 15%). This will also be problematic in the future, since this habit emerges when people are young and only changes with difficulty as they grow older.
The price is and will always remain a major factor and is the decisive factor in one restaurant visit in five – across all age groups. But the significance of price has changed; what counts today is a good price-performance ratio. In addition, disposable income, particular that of the millennials, has fallen. According to a study by Goldman Sachs, today this group has 70% less money than it did five or six years ago.
On this basis supermarkets are expanding their foodservice range – not, mainly, through restaurants of their own; instead, their shelves contain more and more ready-made dishes, including food for lunch-time. Millennials in particular use these products. In this process the supermarkets are not only gaining the €3.20 spent on lunch. On average, they earn a bill of €10, since at midday people also do their food shopping for home. "Supermarkets are playing an incredibly important role in our business." Fast-food and take-away providers are losing out.

Supermarkets are playing an incredibly important role in our business.

Among the demographic changes comes the increasing preference of the 65+ generation for eating out. It is one of the characteristics of this group that they enjoy a high disposable income, don't worry much about the future, generate large average bills, and consider socialising to be very important. Moreover they are keen on modern dishes and are not put off by fast food.
The business to benefit most from the increasing number of single households and from the increasing proportion of working women is the breakfast trade. "There is twice the likelihood of having breakfast in OOH when you're single," says Pinsker. A positive development for the whole industry. The gainers are cost sector (canteens), retail and convenience, and fast-food and take away.
"To sum up, we see two basic trends. One

Fast Casual Is the Winner

Jochen Pinsker is Senior Vice President Foodservice of the NPD Goup Inc., the leading foodservice market research company, where he has been working for nearly 20 years. Since 1997, the company established CREST in Europe, currently up and running in Germany, UK, France, Spain, Italy and Russia and outside of this continent in 5 other countries globally. NPD is the source for information on consumer purchases of commercially prepared meals, snacks & drinks.



is a downward-trend for price and value, one is an upward-trend for experience." In both cases it applies to the quickservice sector and leads to a thinning middle. There are favourably priced offers of good quality on the one hand, and more significant alternatives in fast casual or delivery on the other. "This is the trap where some of the quickservice players are." Whether upgrading or couponing are ways out of this unfortunate situation is something which Pinsker does not want to predict, for this, he says, is difficult to forecast. It is certain that the prevailing change cannot be stopped and that its tempo is rising rather than falling. The gainers are mainly the fast-casual, retail and supermarket sectors, bakeries and delivery services.

www.npd.com ir

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Essentials & Fundamentals

7

Este capítulo que podría considerarse un cajón de sastre donde ir a parar reportajes de menor interés, adquiere plena identidad y justificación, como consecuencia de que los temas seleccionados guardan relación directa con los reportajes e informaciones que aparecen en otros capítulos.

Hay cinco grupos de artículos que van desde crónicas (**Essentials**) de reuniones en el seno de las Summit que merece la pena considerar específicamente, hasta fichas resumen de empresas (**Companies**) de restauración que han sido, o son, un referente en su segmento de actividad, mientras que para que se tenga una referencia de los países (**Countries**) que analiza en sus informes NPD CREST se añade una crónica de su sector de foodservice, incluída España, y se suma el caso de Rusia, por lo que estaba siendo y pudo ser, antes del conflicto con Ucrania.

Especial consideración merecen las entrevistas (**Interviews**) seleccionadas, fuente de conocimiento del talante empresarial o emprendedor del que fue o es, en la empresa que dirigía o dirige y del que se pueden extraer y aprovechar interesantes conclusiones, a la vista de sus respuestas.

Por último, que no al final y como se trató en la parte I, en Fundamentals, se reseñan algunos editoriales del duplo de pioneras redactoras de la revista y del que luego las sustituyó. Tanto los escritos de Weiss y Wachholz (W y W) como los de Tomic respiran juicios y reflexiones a tener muy en cuenta, en la cotidiana tarea de un profesional laborando en el sector de foodservice.

Se acompañan a esta introducción textos de:

ESSENTIALS: Navigating trough the storm
by Ignasi Ferrer

COMPANIES: Prêt a Manger

COUNTRIES: Rusia

INTERVIEWS:

- C. Bergfors, CEO Max Suecia
- Louis Le Duff Fundador de Groupe Le Douff
- T. Guether GGO Eur&Me Compass Group

FUNDAMENTALS: WyW y Boris Tomic

Contenido: Essentials & Fundamental

Año de aparición	Título de la Sección	Autor/Temática
ESSENTIALS		
2013	Navigating trough the storm	Ignasi Ferrer CEO Eat Out
2015	The importance of the individual	Panel moderado por I. Ferrer
2015	A Culinary Global Village	Naked Juice /Pollo Campero/Jamie´s Italian
COMPANIES		
2011	The Italian in the Englishman	Jamie´s Italian
2017	On the Move	Autogrill
2015	5000 for their 50Th	Subway
2018	Sandwich Star	Pret a Manger
2021	Yum! Brands Europe	Yum!
2021	Accelerating the Archs	McDonald´s

Contenido: Essentials & Fundamental

Año de aparición	Título de la Sección	Autor/Temática
COUNTRIES		
2016/19/20	Rusia	Foodservice
2020/22	Francia	Foodservice
2021	Alemania	Foodservice
2022	España	Foodservice
2022	Italia	Foodservice
INTERVIEWS		
2011	Fresh Fast and Beautiful	M. Bauer and others Vapiano
2011	Connective Culture	H. McGovern CEO AmRest
2011	Radically Fresh	O. Hallter Marché International
2011	Commitment to Sustainability	C. Bergfors CEO Max
2012	Dough Doyen	L. le Duff Groupe Le Duff
2012	Making a Difference	R. Shaich CEO Panera
2013	Italian Interpreter	J. Bastianich MD Eataly
2013	Space Matters	A. Yau creator Wagamama
2014	Brands in Transit	W. Seib CEO HMSHost
2014	Spreading the Savoir Faire	M. Holder CEO Paul International
2014	Passenger Persuasion	M. Angela CCO SSP Group
2015	Staying Forever Young	R. Hiltl CEO Hiltl
2016	Teamwork is Key	M. Askin CEO F&B Azadea Group
2016	Keeping the Family Ethos Alive	J. Eckbert CEO Five Guys
2017	The Naked Chef goes Global	J. Knight MD JORG Jamie Oliver G.
2017	Full-Speed Back to Better Times	B. vn den Nieuwenhof MD La Place
2018	Convincing 60.000 Shareholders	D. McDowall MD BrewDog Bars
2018	A gateway to a Better World	J. Vincent creator Leon
2019	Thinking out of the box	B. Calleja CEO Livit
2020	The automation of our Food is inevitable	M. Robles CEO Food by Robots
2022	The pressure for change is tremendous	T. Guether GGO Eur&Me Compass Group
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	Editorials	Gretel Weiss & Marianne Walhholz
	Editorials	Boris Tomic

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ESSENTIALS

Photo: Thomas Fedra

Navigating through the Storm

When the economic crisis hit Europe, Spain was undoubtedly in the eye of the hurricane. But unlike a storm, the crisis did not abate after a couple of days. The depression that reached Spain in summer 2008 is still gripping the nation and, of course, the local foodservice market. Only a few companies have managed to cope with the tough conditions. Among them is the Spanish Eat Out Group. "We are doing pretty well," said Ignasi Ferrer, CEO of Eat Out at the 13th European Foodservice Summit in Zurich. In his emotional speech he shared his own particular recipe for fighting the crisis.

www.eatout.es

When Ignasi Ferrer took over the top position at the Catalan company, rosy times lay ahead. The Eat Out Group (core brands: Pans & Company, FrescCo, Ribs, Dehesa Santa Maria) would open more than 75 new restaurants every year and acquire several new brands; same-store sales and margins would go up continuously – until the summer of 2008. "We were having fun beating all records in terms of profits," the CEO remembered. "But suddenly, everything was different. We found ourselves in the middle of a perfect storm." The market dropped, hyperinflation caused the price of raw materials to spiral upward, the purchasing power of the Spanish consumer crashed. "But in this climate, we have been doing well; we have been growing and have out-performed the market," said Ferrer.

So, what did the group do to sail successfully through the storm? How did Eat Out manage to grow while others were falling into pieces? "We might not have the secret to success, but we have found a recipe for our company." One of Ferrer's first instincts was the urge to react as quickly as possible. "It sounds obvious now. But when you are in the middle of a crisis, it isn't. In our business, it's not only that you lose sales every day, those sales won't come back! People won't have two sandwiches tomorrow, if they don't eat one today." Ferrer felt that the further the company drifted away from the path of success, the harder it would be to get back into the game. One of the lessons to be learned at that time was: "It's a tough task to fight denial. Because, when things have been going well for a long time, it is very hard to accept the fact that suddenly something has to be changed." When the Eat Out Group analysed its business model in order to prepare for the new challenges, Ferrer made it clear that not a single part of the company's mindset was excluded from the stress test. The entire structure of the company was reconsidered. "It took us a couple of months to make sure that the whole company was moving forward on the same path," admitted Ferrer.

Sailing through a storm is a tough job, but people can still enjoy it. It is a matter of attitude.

Meanwhile, market research, usually one of the most popular tools in times of uncertainty, was rejected by the Spanish CEO: "Things were moving too fast and market research is too slow. By the time you come to a conclusion based on the research, it might already be too late." Instead of relying on external advice, Ferrer suggested: "Let's go outside on the street and look around – not only at our competitors but also at Zara or H&M. Which shops are busy? What are consumers doing there? What are they buying?"

Based on its own observations, the company drew its conclusions and defined a profile of the "post-trauma consumer". According to their findings, the new consumers in Spain are ...

a) ... **very polarised**. They shop low budget at Zara as well as high fashion at Prada. They are torn between saving and investing money. The same strategy of mixing pricey and economic options is applied to their choice of restaurants. By investing more thought into choosing between different options, the consumer is becoming smarter.

b) ... **nostalgic**. The majority of consumers in Spain have suddenly lost a great deal of their purchasing power. For a long time, many consumers have spent more money than they should have. It leaves them with the feeling of having been rich in the past.

c) ... **longing for the lost quality of life**. As people in Spain don't go out as often anymore, those times when they do become more valuable. When they go to a restaurant, they don't want to take the risk of a bad night. Picking the right place is an important task.

When the company had figured out how consumers had changed during the crisis, the next question was: how could the company meet consumers' altered expectations? How were they to adapt the common fields of pricing, segmentation, communication, experience and emotion?

Ferrer's strategy involved nearly every division of the company:

a) Eat Out Group should **focus on its strong brands**! "As we are not the biggest of companies, it was all about concentrating resources. We reduced the number of our brands." Only those that were considered fit enough to cope with the environment remained in the portfolio. The group also made sure that the best people worked for the best brands.

b) As the consumer becomes pickier **operations have to improve**. So the group invested in training. Remodelling was another task Ferrer has addressed over the past few years. "We wanted the customers to see that they were visiting a leading brand. We had to make it clear to them that they would get the best product at our restaurant."

c) As the consumer cannot afford a weekend trip to Rome anymore, **going to an Italian restaurant in his/her home town has to be nearly as good as going out in Italy.**

d) **Different groups of consumers have to be identified. Then, product prices have to be adapted to their needs and values.** "Pricing was the most difficult aspect. We had to deal with higher raw material costs, whilst shareholders wanted higher margins. We invested in the business, whilst consumers could afford less," said Ferrer.

e) **The innovation cycle had to become shorter.** The speed of innovation increased and went from a yearly to a weekly basis. In order to make sure that identified opportunities were responded to in the restaurants within three weeks, marketing, supply chain and R&D had to work hand in hand. A role model was found in the company's home country: textile group Inditex shows how it is done with the example of the fashion label Zara.

f) **Internal control has to be reinforced.** "You have to make sure that every restaurant is in line with the development. No variety allowed!"

g) **People must know: this is still there and this is serious.** It is not the time to relax.

h) **The level of efficiency has to be increased.** "We realised that during the good times we were lacking in energy and efficency. When the crisis is over, we shall still be able to use this new efficiency to achieve great things."

When this is over, we have to be amongst the industry's leaders.

Obviously, the success of all these measures depends on people – change is never achieved without people. "You have to prepare the whole company for the fact that dynamism and uncertainty are part of the game for the next ten years. There's no magic trick to overcome the crisis. It will be like this for a long time, so don't get frustrated." Ferrer believes that everyone on board needed to understand why they were doing what they were doing. Long-term goals were set up, so that everyone knew where the company was heading. Sometimes, short-term issues had to be sacrificed to Ferrer's global vision: "When this is over, we have to be amongst the industry's leaders." CHO

▪ ▪ ▪ Transforming the Business in 3 Steps ▪ ▪

1. **Short-Term Reaction** Understand
2. **Business Strategy** Adapt
3. **Team & Leadership** Execute

COMPANIES

Prêt a Manger

CASE STUDY

Photos: Pret A Manger, Johanna Warnem

Sandwich Star

Since its beginnings in London in the mid-1980s, Pret A Manger, founded by Julian Metcalfe and Sinclair Beecham, has become a blueprint for melting foodservice and retail: pick up your fresh, pre-packed sandwich from the shelf, for take-away or on-site consumption. Though not the first one in the market place, factors such as obsessive respect for quality ingredients, continuous innovation and a focus on customer communication have singled out Pret as a benchmark brand. www.pret.com

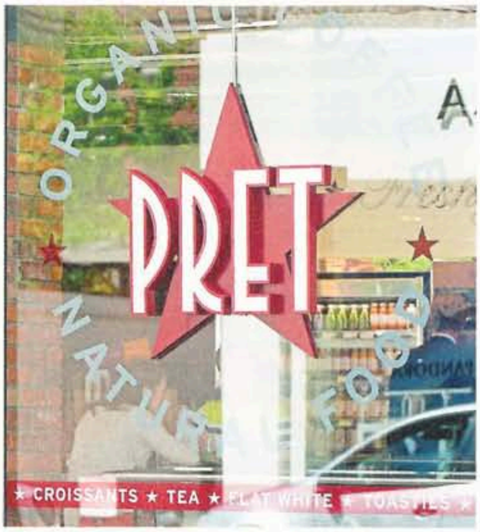
Over the past 30 years or more Pret has been setting standards for a new category of fast food with a healthy touch, a role model for many who have come after it. The brand, now in the hands of JAB Holding (owned by German billionaire family, Reimann), stood and stands primarily for sandwiches and related products such as wraps, baguettes, salads and suchlike, produced daily on-site by hand from ethically sourced, fresh, natural ingredients for take-out or eat-in customers. Plus sweet snacks, from fruit salad to patisserie, and the obligatory beverage range, from smoothies to speciality coffees: Pret is not only Great Britain's leading sandwich chain but also a major player in the coffee-bar field.

The convenient combination of fresh packaged products from the refrigerator cabinet – a feature pinched from food retail – and counter service was quickly appreciated by time-stressed city consumers. Even if the grab-and-go component was not Pret's exclusive preserve, the way in which it incorporated the functional self-service element into a communication strategy which, from the very start, made great play with both high-quality package design and storytelling, to provide the brand with an emotional charge – this scored a success seldom seen.

In 1998, the year when FoodService Europe & Middle East was founded, there were 65 of the 75 existing Pret outlets in Greater London, all run under the firm's own management, and sales at that time were around £80 million. Since then, step by step, Pret has extended its radius and increased its net volume to 502 shops in seven countries (as of the end of 2017). At the same time system-wide sales have grown elevenfold to £879 million (£696 of which is generated in Europe). An increase on the previous year of 13.2%, with 58 new openings, continuing the brand's ability in the past to post double-digit growth rates in outlets and sales. The solidity of this growth is underpinned by significantly rising figures on existing sales areas – it was 4.8% in 2016, and EBITDA in the same year rose by 11% to £93.2 million. "We achieved our 9th consecutive year of like-for-like sales growth," commented Clive Schlee, CEO since 2003, looking back on 2016.

But now a glance behind the figures at the success matrix of the leading British sandwich maker, which meanwhile (as of the end of June 2018) will already be found in nine countries outside its British home market.

Sales solution. The mixture of grab-and-go plus counter service ensures rapidity. The counter is not just for pay-



Pret A Manger: a brand with a strong and catchy mission from day one, still valid today – serving fresh, natural, hand-made fast food with a quality appeal at affordable prices to time-stressed urban consumers. Pret continues to be a pacesetter at the 'gourmet' end of the sandwich market, which the company has helped create since 1986.

ment but features a growing number of optional additional products, from hot drinks – a major item in the sales mix, more than half of customers ordering a speciality coffee – to patisserie products, to hot snacks.

Procurement. Pret underlines its ecological orientation and its profile as a high-quality provider by purchasing a significant part of its raw materials from organic farms or non-industrial, preferably regional producers. Its motto: ethical sourcing. The coffee is always bio-certified.

Production. Freshness is a declared principle: nearly all the snack range destined for the refrigerator cabinets are produced fresh daily by hand in each individual restaurant (or nearby).

Range and innovation. While the familiar triangle sandwiches are the brand's food base, Pret has always kept abreast of the times: new recipes, new product strategies: sushi, soups and other hot snacks (recently: breakfast brioches, power pots made with soft poached eggs, and a dairy-free coconut porridge, innovative drinks, plus recently a growing range of vegetarian and vegan or gluten-free products). Clive Schlee says: "In 2016 18% of sales came from products which had been launched in the previous year."

Supplementary formats. A café version came and went. Veggie Pret, conceived originally as a temporary pop-up, has achieved a permanent slot in the portfolio: established in London (Soho) in 2016, it has enjoyed success beyond all expectations. The most popular products in the 45-item meat-free range can now be found in regular Pret stores, too. Since spring 2017 there has been a second purely vegetarian Pret in the London district of Shoreditch, and a third followed last autumn in Clerkenwell.

Prêt a Manger

Case Study

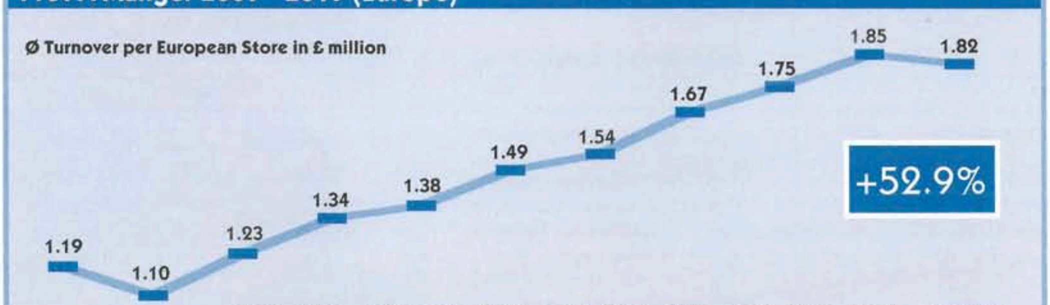
At the end of 2017, Pret A Manger could be found in seven countries with 502 stores. Its main bastion continues to be the UK (360/+31), followed by the USA (90/+16), Hong Kong (25/+6), France (23/+4), China (2), Dubai and Singapore (1 each). Denmark and The Netherlands were added recently, and Germany (Berlin Central Station) will follow later this year. Every day more than 300,000 customers are served in Pret shops world-wide.

Communication and marketing. Pret does not run any classical advertising but has an unmistakable style of language and imagery. Storytelling – nowadays lauded on all sides as a secret weapon – is a part of it, just as much as a good helping of humour. In the digital world the CEO works for loyalty through his tweets.

Corporate culture and CSR. Earth-friendliness and the idea of a better quality of life create added emotional value for both guests and staff. Pret marks its social commitment in fully concrete terms with its pledge to give to charity organisations all fresh products not sold in the course of the day; in 2016 these amounted to a donation of a good 3 million food items. And the Pret Foundation Trust works in helping the homeless. Such policies are well repaid in sympathy and commitment. Motivated service is one of the concept's strengths; a great deal is invested in recruiting, team building and internal promotion. One striking fact: some 80% of all general managers started as simple team members.

Outlets. Pret has expanded its original focus on high-street locations. Today the stores with the star will be found at transport locations such as Penn Station in New York or Charles de Gaulle Airport in Paris, on Exeter University campus, or at the international airport in Dubai. In 2016 no less than 16% of Pret sales were generated at airports and railway stations, and the figures are rising.
Growth on international markets – principally the USA, with 90 units at the end of 2017, followed by Hong Kong (25) and France (23) – and in new categories of outlet was no longer to be accomplished without institutional partners. Now Pret works jointly with motorway service station operators such as Welcome Break and Roadchef in Great Britain, and with major international transport-catering players (SSP, Autogrill). The first partner stores run jointly with Autogrill subsidiary HMS Host International in Denmark (Copenhagen Airport, 2 outlets) and the Netherlands (Utrecht, Central Railway Station) have been on the network since recently. A short time ago came a joint venture with Station Food, a subsidiary of Deutsche Bahn. In autumn 2018, Pret will celebrate its launch in Germany with a food-court outlet at Berlin Central Station.
A bright future, then? It certainly seems so. And the new ownership arrange-

Pret A Manger 2007 - 2017 (Europe)



	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	10 years
Units Europe	185	196	200	221	236	253	283	299	315	348	383	+107.0%
Turnover in £ m	200	210	244	282	317	365	414	486	537	611	696	+248.0%
Turnover/Unit in £ m	1.19	1.10	1.23	1.34	1.38	1.49	1.54	1.67	1.75	1.85	1.82	+52.9%

©FSE & ME

CASE STUDY

ments seem to suggest it. Major stakeholder Bridgepoint, which entered Pret in 2008 as part of a management buyout for around £350 million, announced at the end of May that its stake, plus further minority shareholdings, was to be taken over by JAB Holding of Luxembourg. The deal is due to be concluded shortly and is valued by insiders at around £1.5 billion. The portfolio of this holding company, specialising in acquisitions of international F&B and foodservice brands, now includes such significant players as JDE, Panera Bread, Krispy Kreme and Espresso House. JAB is obviously not interested in short-term exits. "All of us at Pret believe JAB will be excellent long-term strategic owners," runs the confident statement from CEO Clive Schlee. ■

Marianne Wachholz

Clive Schlee: He came on board as CEO in 2003; five years earlier he had joined Pret co-founder Julian Metcalfe as a founding partner in Itsu, offering Asian-inspired fast food, which meanwhile grew to some 70 outlets. A major previous stage in his career was Jardine Matheson, the Hong Kong based multinational group, among whose interests are hotels, real estate and retail. Clive will be a speaker at the 19th European Foodservice Summit this September in Zurich.

COUNTRIES


Shikari by Rosinter


Teremok


Dodo Pizza

Killfish Discount Bar

Russia: Learning to Adapt

The economic storm that started in Russia two years ago still affects the local foodservice market. A weak rouble, caused by the low price of oil, forces consumers to change their eating habits and to choose more affordable options. Somehow, foodservice providers and their chefs have learned to adapt to the new business realities. Julia Matveeva reports.

According to the official figures, in 2015 the Russian away-from-home market declined by 5.5%, at comparable prices, to RUB1,300 bn/€19.2 bn. The same negative trend has continued in 2016. Weakening consumer demand and a decreasing average spend are forcing many restaurateurs to consolidate their businesses and to get rid of unprofitable operations. Sometimes it is not just a few locations, but a whole chain. This summer, G.M.R. Planet of Hospitality, one of the oldest and biggest restaurant groups in Russia, announced the termination of their master-franchising contract with Sbarro, an American QSR pizza brand, which the company has been operating in Russia for almost 20 years. The group's President, Merab Elashvili, admits that one of the reasons for this was the import ban on many food items, which came into force in 2014, followed by a decline in consumption after the devaluation of the rouble. As a result, the company's turnover fell from RUB7 bn to 5.5 bn in 2014-2015 and the average bill in the restaurants went down by 20-30%. At the time when the licence agreement was terminated, the group operated 88 Sbarros, with 54 of them corporately managed and 34 franchised. As a result, the Russian franchisees will now have to deal with Sbarro Inc. on their own.

Smaller and smarter

The fifteen years of aggressive chain expansion, which the Russian foodservice market has experienced since 1999, are now being followed by years of consolidation and a search for new business models, better adapted to the changed economic environment. Within the last twelve months, Russia's 40 largest restaurant companies have increased their presence in the market by only 2.9% (2015: 5%; 2014:14.3%; 2013: 15.1%). Fifteen companies recorded negative growth, as they optimised their restaurant portfolios. The proportion of companies showing a decrease in assets (36.6%) is the highest in the nine year history of the ranking.

The only sector that seems to benefit from the current situation is QSR. Three of the international fast-food giants among the Top 10 continue their march

Rusia

Russia: Top 40 Restaurant Operators Mid 2016

– Number of units (company owned & franchising) –

R	('15)	Group	Russia	Vs. '15	Mos-cow	Brands	Categories	Brand Origin	Russia Start	www
1	(1)	Marcon	850	2.7%	400	Stardog!s	Street + QSR	Russia	1993	stardogs.ru
2	(2)	Subway	636	-2.3%	104	Subway	QSR	USA	1994	subway.ru
3	(4)	McDonald's	572	12.6%	234	McDonald's, McCafé	QSR	USA	1990	mcdonalds.ru
4	(3)	Shokoladnitsa	527	-11.6%	360	Shokoladnitsa, Coffee House, Vabi Sabi, etc.	QSR + Casual	Russia	2001	shoko.ru
5	(5)	Yum! Brands	500	32.6%	220	KFC, Pizza Hut	QSR	USA	1993	kfc.ru
6	(7)	Burger King	354	20%	185	Burger King	QSR	USA	2010	burgerking.ru
7	(11)	Teremok	289	7.5%	148	Teremok	QSR	Russia	1998	teremok.ru
8	(7)	Rosinter Restaurants	268	-9.2%	173	Il Patio, Planeta Sushi, TGIF, Shikari, Costa Coffee, etc.	Casual	Russia, USA, GB	1993	rosinter.ru
9	(9)	Kroshka-Kartoshka	252	-11.3%	195	Kroshka-Kartoshka	Street + QSR	Russia	1998	kartoshka.com
10	(10)	Coffee Like	215	15.6%	15	Coffee Like	QSR	Russia	2013	coffee-like.com
11	(13)	Vkusnolubov	164	5.8%	0	Vkusnolubov	Street + QSR	Russia	2005	vkusnolubov.ru
12	(15)	Podorozhnik	158	9.7%	0	Podorozhnik	Street+ QSR	Russia	1995	podorognik.ru
13	(10)	Planet of Hospitality	153	-45.4%	69	Sbarro, Vostochniy Bazar, Elki-Palki, etc.	QSR+ Casual	Russia/ USA	1998	sbarro.ru
14	(14)	Cinnabon	137	-6.2%	15	Cinnabon, Auntie Anne's, Hesburger	QSR	USA	2009	cinnabon-russia.com
15	(22)	GK Arkadiy Novikov	131	24.8%	130	Novikov, Prime Star, Krispy Kreme, etc.	Fine + Casual + QSR	Russia	1992	novikovgroup.ru
16	(21)	Amrest	120	13.2%	21	KFC, Pizza Hut	QSR	USA	2007	amrest.pl
17	(16)	Vesta Center International	114	-4.2%	90	Yakitoria, GinnoTaki, Menza, etc.	Casual	Russia	1995	vci.ru
18	(17)	Univerfood	112	-4.3%	0	Juice Master, Blinoff, etc.	QSR + Casual	Russia	2003	univerfood.ru
19	(23)	Alshaya Group	109	6.9%	81	Starbucks, Shake Shack	QSR	USA	2007	starbuckscoffee.ru
20	(18)	Ginza Project	108	-3.6%	61	MariVanna, DzhonDzholi, Jamie's Italian, etc.	Fine + Casual	Russia	2000	ginzaproject.com
21	(28)	Traveler's Coffee	106	31%	3	Traveler's Coffee	Casual	Russia	1997	travelerscoffee.ru
22	(-)	Dodo Pizza	105	128.3%	2	Dodo Pizza	QSR	Russia	2011	dodopizza.ru
23	(20)	Eurasia	104	-4.6%	0	Eurasia	Casual	Russia	2001	evrasia.spb.ru
24	(25)	Alendvic	92	7%	0	SFC-Express, Viva la Pizza, Pelmeshki da Vareniki, etc.	QSR + Casual	Russia	1993	alendvic.ru
25	(19)	Grand Food	91	-17.3%	21	Tashir Pizza, Kebab Toon, etc.	QSR + Casual	Russia	2001	tashir.ru
26	(24)	Coffeeshop Company	90	0%	23	Coffeeshop Company	Casual	Russia/ Austria	2008	coffeeshop-company.ru
26	(29)	Stolle	90	20%	19	Stolle	QSR	Russia	2002	stolle.ru
28	(33)	Papa John's	78	21.9%	47	Papa John's	Casual	USA	2003	papajohns.ru
29	(30)	Tanuki-Ersh	76	8.6%	66	Tanuki, Ersh, KitaiChi	Casual	Russia	2001	tanuki.ru
30	(27)	Harat's	75	-8.5%	1	Harat's, Kioto, etc.	Casual	Russia	2009	harats.ru
31	(34)	Sibirskie Bliny	66	11.9%	0	Sibirskie Bliny	QSR	Russia	2004	sibbliny.ru
32	(31)	Chainaya Lozhka	63	-8.7%	0	Chainaya Lozhka	QSR	Russia	2001	teaspoon.ru
32	(25)	Killfish Discount Bar	63	-26.7%	10	Killfish Discount Bar	Casual	Russia	2009	killfish.ru
34	(35)	Ris	58	0%	0	Ris	Casual	Russia	2006	rris.ru
35	(38)	Foodmaster	57	5.6%	0	Vilka-Lozhka, Pechki-Lavochki, etc.	QSR	Russia	1997	food-master.ru
36	(-)	Double B	56	111.5%	45	Double B	QSR	Russia	2012	double-b.ru
37	(32)	Malakhite	53	-20.9%	7	Paul Bakery, Doner Kebab, etc.	QSR	Russia	1994	malachite.ru
38	(-)	Restart Group	50	51.5%	47	Chaihona # 1, ObedBufet, Plovberry, etc.	QSR + Casual	Russia	2001	chaihona.ru
39	(-)	Domino's Pizza	47	88%	47	Domino's Pizza	QSR	USA	1998	dominospizza.ru
40	(37)	Food Retail Group	46	-16.4%	9	Dve Palochki, Marchelli's, etc.	Casual	Russia	2003	dvepalochki.ru
40	(36)	Kruzhka	46	-17.9%	39	Kruzhka	Casual	Russia	2002	kruzhka.ru
		Total	**7,281**	**2.9%**	**2,887**					

State: July 2016

Source: FoodService Russia

Teremok

Burger King


Domino's Pizza

Moscow: Top 20 Foodservice Brands Mid 2016

– Number of units (company owned & franchising, Moscow + Moscow region) –

R	('15)	Brand	Concept	Moscow	Vs '15	St. P.*	Russia	Group	Brand Origin	Russia Start
1	(1)	Stardog!s	Hot dog	400	-13.6%	0	850	Marcon	Russia	1993
2	(2)	Shokoladnitsa	Coffee	244	-4.3%	26	355	Shokoladnitsa	Russia	2001
3	(3)	McDonald's	Burger	234	9.3%	72	572	McDonald's	USA	1990
4	(3)	Kroshka-Kartoshka	Potato	195	-8.9%	28	252	Kroshka-Kartoshka	Russia	1998
5	(6)	KFC	Chicken	191	29.9%	63	462	Yum! Brands	USA	1993
6	(5)	Burger King	Burger	185	19.4%	42	354	Burger King	USA	2010
7	(7)	Teremok	Crepes	148	11.3%	131	289	Teremok	Russia	1998
8	(8)	Subway	Sandwich	104	-14.8%	54	636	Subway	USA	1994
9	(9)	Coffee House	Coffee	94	-13%	56	150	Shokoladnitsa	Russia	1999
10	(10)	Baskin Robbins	Ice-cream	80	-14%	0	336	BRPI	USA	1992
11	(12)	Starbucks	Coffee	78	4%	14	104	Starbucks/Alshaya Group	USA	2007
12	(11)	IL Patio	Italian	70	-10.3%	7	116	Rosinter Restaurants	Russia	1993
12	(14)	Yakitoria	Asian	70	2.9%	3	92	Vesta Center Int.	Russia	1999
14	(18)	Prime Star	Sandwich	62	26.5%	0	62	Novikov Group	Russia	2005
15	(16)	Tanuki	Asian	54	3.8%	0	63	Tanuki-Ersh	Russia	2004
16	(19)	Chaihona #1	Central Asian	50	13.6%	1	53	Restart Group, Timur Lansky	Russia	2001
17	(-)	Domino's Pizza	Pizza	47	88%	0	49	Domino's Pizza	USA	1998
17	(20)	Papa John's	Pizza	47	17.5%	0	78	Papa John's	USA	2003
19	(15)	Planeta Sushi	Asian	46	-22%	3	71	Rosinter Restaurants	Russia	1999
20	(-)	Double B	Coffee	45	104.5%	6	56	Double B	Russia	2012
		Total		**2,444**	**1.2%**	**506**	**5,000**			

State: July 2016 * St. Petersburg

Source: FoodService Russia

St. Petersburg: Top 20 Foodservice Brands Mid 2016

– Number of units (company owned & franchising) –

R	('15)	Brand	Concept	St. P.*	Vs. '15	Moscow	Russia	Group	Brand Origin	Russia Start
1	(1)	Teremok	Crepes	131	3.1%	148	289	Teremok	Moscow	1998
2	(2)	Eurasia	Asian	101	-1%	0	104	Eurasia	St. P.*	2001
3	(3)	McDonald's	Burger	72	-1.4%	234	572	McDonald's	USA	1990
4	(5)	KFC	Chicken	63	14.5%	191	462	Yum! Brands	USA	1993
5	(4)	Coffee House	Coffee	56	-5.1%	94	150	Shokoladnitsa	Moscow	1999
6	(6)	Subway	Sandwich	54	0%	104	636	Subway	USA	1994
7	(7)	Chainaya Lozhka	Crepes	47	-4.1%	0	63	Chainaya Lozhka	St. P.*	2001
8	(9)	Burger King	Burger	42	16.7%	185	354	Burger King	USA	2010
9	(8)	Coffeeshop Comp.	Coffee	37	0%	23	90	Coffeeshop Co./ Coffee Set	Austria	2008
10	(12)	Tokyo City	Asian	29	16%	0	29	Tokyo City	St. P.*	2005
11	(10)	Kroshka-Kartoshka	Potato	28	-15.1%	195	252	Kroshka-Kartoshka	Moscow	1998
12	(11)	Shokoladnitsa	Coffee	26	-10.3%	244	355	Shokoladnitsa	Moscow	2001
13	(15)	Bushe	Bakery	25	13.6%	0	25	Bushe	St. P.*	1999
14	(14)	Dve Palochki	Asian	23	-4.2%	7	30	Food Retail Group	St. P.*	2003
15	(12)	Wasabi	Asian	20	-20%	1	26	Wasabi	St. P.*	2003
16	(16)	Pizza Ollis	Italian	18	-14.3%	0	18	Pizza Ollis	St. P.*	2004
17	(19)	SPB	Beer	17	13.3%	6	24	SPB	St. P.*	2006
18	(-)	Coffee Like	Coffee	16	14.3%	15	215	Coffee Like	Izhevsk	2013
18	(18)	Mama Roma	Italian	16	-5.9%	0	22	Mama Roma	St. P.*	1998
18	(-)	Stolle	Pie	16	33.3%	19	90	Stolle	St. P.*	2002
		Total		**837**	**1%**	**1,446**	**3,806**			

State: July 2016 * St. Petersburg

Source: FoodService Russia

through the Russian market, all of them again showing double-digit relative growth. The absolute growth leader is Yum! Brands with 123 new KFC and Pizza Hut units in Russia, followed by McDonald's (+64) and Burger King (+59). Today's popularity of KFC among Russian consumers is partly due to the growing demand for chicken items on the menu, which are normally cheaper than beef dishes and thus more attractive for price-conscious consumers. The QSR players admit that price competition is getting tougher and tougher nowadays, especially in food courts. Operators have responded by setting an extremely low price on popular bestsellers, such as a cheeseburger in Burger King at RUB49/ €0.67, or a baked potato in Kroshka-Kartoshka at RUB59/ €0.81, hoping to stimulate the flow of customers and make their profit from other menu items.

All in all, massive consumer migration from one market segment to another is one of today's signature trends. Middle-class consumers, who used to frequent casual-dining establishments but have been badly hit by the new economic realities, are now more likely to choose a modern fast-casual restaurant (average customer frequency at ObedBufet, a popular Moscow free-flow concept, generates 3,000 bills a day) or a small mono-product concept with limited service, such as a hipster burger bar, be it for lunch or dinner. And those who cannot afford to go out as often as before now buy ready meals at the supermarket to enjoy in the office at lunchtime or at home in the evening. As a result, many retail operators are now hiring former restaurant chefs and managers, are establishing their own production centres and offering their customers a wide variety of ready meals, from sandwiches, salads and soups to sushi and Asian noodles. Supermarkets have become a new player in the foodservice market and a serious competitor of QSR operators.

Growing competition for traditional QSR concepts and coffee bars is also coming from petrol stations. The possibility of having a cup of coffee and a snack at these locations is not just a pleasant additional service offered to travellers, it also drives extra petrol sales. Seduced by this prospect, many petrol-station operators organise F&B departments and launch their own coffee corners or cafés.

Between coffee and pizza

Apart from burgers that remain a universally popular offer everywhere, from street-food festivals to upscale, casual restaurants, two other products are highly in demand today. Number one is coffee and number two is pizza, as this year's growth champions in our ranking prove. Among them are two pizza concepts, Dodo Pizza and Domino's, and two coffee-bar chains, Coffee Like and Double B.

The winners in the coffee stakes reflect the two main trends in the coffee-bar market. On the one hand, there is the enormous popularity of coffee to-go, giving birth to various small units in a variety of locations, from high-street retail outlets and parks to shopping malls and business centres. Unlike traditional coffee bars, mini formats require much lower investment, have a narrow, simple menu and a much shorter pay-off period. The success story of the Coffee Like chain, launched only three and a half years ago by 22-year-old entrepreneur, Ayaz Shabutdinov, in Izhevsk and now present in 79 towns across the country, illustrates the considerable interest that exists for such concepts, both from consumers and from potential investors, who want to try their hand at a relatively inexpensive foodservice franchise.

Launched in 2012 by Anna Tsfasman, a former managing director of Moscow coffee-bar chain Kofein, Double B reflects the growing demand for craft coffee and alternative brewing methods promoted by the 3rd wave coffee shops. When we look at the wide variety

Bushe

Costa Coffee (Rosinter)

Shikari, by Rosinter

Burger King

Shokoladnitsa

Traveler's Coffee

28

of food offered by established coffee-bar brands such as Shokoladnitsa or Coffee House, it would have been difficult to believe, some five years ago, that a concept selling sophisticated coffee and no food could become successful in Russia, where most people like to eat when they go out. But the 56 Double B units that have opened within just four years speak for themselves.

As for pizza, the impressive results shown by concepts offering it as a core product come as no surprise in times when people long for cheaper options but still do not want to cook every day. Little wonder then that more and more consumers choose pizza delivery; and the operator's task here is to make the process as fast and transparent as possible. This is where the young and ambitious local chain Dodo Pizza competes effectively with international giants like Papa John's, Domino's and Pizza Hut. A unique piece of ERP software, created by the company itself, makes the business fully transparent – both for customers, who can watch their pizzas being prepared online via webcams, and for franchisees, who can access the full operational statistics for their restaurant. This innovative approach, coupled with a high degree of automation and low initial investment, starting at RUB3.5 m/ €48,000, has helped brand founder Fedor Ovchinnikov find franchising partners in more than 100 Russian towns within just three years.

Local and passionate

Despite evident operational problems, the market situation in big cities like Moscow, St. Petersburg or Novosibirsk looks quite surprising. Entrepreneurs keep talking about the crisis, turnover and average-bills decline, as is shown by the official figures. But, at the same time, more independent restaurants open here now than ever before. Every month new, interesting concepts appear on the restaurant map, from street-food bars to gastro pubs; tables in them sometimes have to be booked at least a week in advance. Foodservice keeps attracting young, ambitious chefs as well as amateurs, who have gained initial experience at weekend food festivals and are keen to try their luck in a real business. And it is often they who establish the trends that big groups try to follow, as they seek to remain sexy for today's consumers.

Rusia

Top 5 Growth Stars*

R	(R)**	Group	Category	Unit Growth absolute
1	(5)	Yum! Brands	QSR	123
2	(3)	McDonald's	QSR	64
3	(6)	Burger King	QSR	59
3	(22)	Dodo Pizza	QSR	59
5	(10)	Coffee Like	QSR	29
5	(36)	Double B	QSR	29

R	(R)**	Group	Category	relative
1	(22)	Dodo Pizza	QSR	128.3%
2	(36)	Double B	QSR	111.5%
3	(39)	Domino's Pizza	QSR	88%
4	(38)	Restart Group	Casual + QSR	51.5%
5	(5)	Yum! Brands	QSR	32.6%

* Number of unit dynamics July '16 vs. July '15 within Top 40
**R in Top 40


Dodo Pizza

Notwithstanding all the difficulties that the import ban brought to the HoReCa sector, one has to admit that it has had some positive effects on Russian agriculture. In their attempt to satisfy the demands of local chefs, farmers now seek to produce everything from marbled meat to hard cheese – and there are certain categories where they are doing quite well. The distance from farm to plate has shortened and using local, seasonal products is now a must for a good chef. The latest restaurant openings reflect a growing interest in the cuisines of different Russian regions, be that Siberia or the Black Sea coast, with customers now able to enjoy the richness and variety of gastronomic traditions in their home country. ■

Rusia

Russia: Top 40 restaurant operators mid 2018

– Number of units (Company owned & franchising)* –

R	('17)	Group	Russia	Vs. '17	Moscow	Brands	Categories	Brand Origin	Russia Start	www
1	1	Marcon	1,035	3.3%	390	Stardog!s	Street + QSR	Russia	1993	stardogs.ru
2	2	McDonald's	665	6.5%	277	McDonald's, McCafé	QSR	USA	1990	mcdonalds.ru
3	4	Yum! Brands Russia	663	11.8%	272	KFC	QSR	USA	1993	kfc.ru
4	6	Burger King	612	28.6%	267	Burger King	QSR	USA	2010	burgerking.ru
5	3	Subway	592	-3.3%	116	Subway	QSR	USA	1994	subway.ru
6	5	Shokoladnitsa	501	-1.0%	367	Shokoladnitsa, Coffee House, Vabi Sabi, etc.	QSR + Casual	Russia	2001	shoko.ru
7	7	Tea Funny World	444	15.0%	132	Tea Funny, Kinoeshki	QSR	Russia	2011	Teafunycafe.com
8	7	BRPI	350	2.3%	84	Baskin Robbins	QSR	USA	1992	baskinrobbins.ru
9	11	Coffee Like	348	43.8%	12	Coffee Like	QSR	Russia	2013	coffee-like.com
10	13	Dodo Pizza	307	63.3%	74	Dodo Pizza	QSR	Russia	2011	dodopizza.ru
11	9	Teremok	293	0.0%	151	Teremok	QSR	Russia	1998	teremok.ru
12	12	Rosinter Restaurants	248	3.7%	176	IL Patio, Planeta Sushi, T.G.I. Friday's. Costa Coffee, etc.	Casual	Russia, USA, UK	1993	rosinter.ru
13	10	Kroshka-Kartoshka	218	-11.0%	176	Kroshka-Kartoshka	Street + QSR	Russia	1998	kartoshka.com
14	18	Amrest	215	54.7%	91	KFC, Pizza Hut	QSR	USA	2007	amrest.pl
15	14	GK Arkadiy Novikov	200	19.0%	193	Novikov, Prime Star, Krispy Kreme, etc.	Fine + Casual + QSR	Russia	1992	novikovgroup.ru
16	15	Bodryi Den	173	6.8%	50	Bodryi Den	QSR	Russia	2012	bodryi-den.ru
17	17	Mega Group	170	14.1%	20	Cinnabon, Auntie Anne's, Hesburger	QSR	USA	2009	cinnabonrussia.com
18	21	Papa John's	163	49.5%	88	Papa John's	QSR	USA	2003	papajohns.ru
19	16	Podorozhnik	158	0.6%	0	Podorozhnik	Street+ QSR	Russia	1995	podorognik.ru
20	29	Grand Food	148	8.9%	22	Tashir Pizza, Kebab Toon, etc.	QSR + Casual	Russia	2001	tashir.ru
21	25	Domino's Pizza	141	46.9%	102	Domino's Pizza	QSR	USA	1998	dominospizza.ru
22	19	Alshaya Group	129	8.4%	98	Starbucks, Shake Shack	QSR	USA	2007	starbuckscoffee.ru
23	23	Ginza Project	110	3.8%	56	MariVanna, DzhonDzholi, Jamie's Italian, etc.	Fine + Casual	Russia	2000	ginzaproject.com
24	26	Stolle	108	14.9%	28	Stolle	QSR	Russia	2002	stolle.ru
25	22	Yakitoria	104	-2.9%	81	Yakitoria, Menza, etc.	Casual	Russia	1995	vci.ru
26	20	Traveler's Coffee	102	-7.3%	8	Traveler's Coffee	Casual	Russia	1997	travelerscoffee.ru
27	24	Alendvic	90	-7.2%	0	SFC-Express, Viva la Pizza, Pelmeshki da Vareniki, etc.	QSR + Casual	Russia	1993	alendvic.ru
28	28	Coffeeshop Company	87	-5.4%	26	Coffeeshop Company	Casual	Russia/ Austria	2008	coffeeshopcompany.ru
29	31	Restart Vasil-chuk Brothers	86	13.2%	76	Chaihona # 1, ObedBufet, Plovberry, etc.	QSR + Casual	Russia	2001	chaihona.ru
30	29	Eurasia	80	-11.1%	0	Eurasia	Casual	Russia	2001	evrasia.spb.ru
31	34	Double B	75	10.3%	63	Double B	QSR	Russia	2012	double-b.ru
32	33	Harat's	73	4.3%	2	Harat's, Kioto, etc.	Casual	Russia	2009	harats.ru
33	32	Tanuki-Ersh	72	-4%	62	Tanuki, Ersh	Casual	Russia	2001	tanuki.ru
34	-	Volchek Bakeries	71	44.9%	0	Volchek Bakeries	QSR	Russia	2013	fvolchek.ru
35	-	Cofix	62	287.5%	54	Cofix	QSR	Israel	2016	cofix.ru
36	38	Foodmaster	61	10.9%	0	Vilka-Lozhka, Pechki-Lavochki, etc.	QSR	Russia	1997	food-master.ru
37	37	New York Pizza/ Kuzina	60	0.0%	6	New York Pizza, Kuzina	QSR	Russia	1996	nypizza.ru/ kuzina.ru
38	35	Malakhite	58	-9.4%	8	Paul Bakery, Doner Kebab, etc.	QSR	Russia	1994	malachite.ru
39	40	Tokyo City	57	14%	2	Tokyo City	Casual	Russia	2005	tokyo-city.ru
40	39	Maison Dellos	52	0.0%	50	Mu-Mu, Cafe Pushkin, Matreshka, etc.	QSR + Fine	Russia	1996	maison-dellos.com
		Total	9,181	10.6	3,680					

*Status: July 2018

Source: FoodService Russia

Rusia

Russia

Moscow: Top 20 foodservice brands mid 2018

– Number of Units (Company owned & franchising, Moscow + Moscow region) –

R	('17)	Brand	Concept	Moscow	Vs. 2017	St. P.*	Russia	Group	Origin	Start in Russia
1	1	Stardog!s	Hot dog	390	6.3%	0	1035	Marcon	Russia	1993
2	4	McDonald's	Burger	277	10.8%	84	655	McDonald's	USA	1990
3	5	KFC	Chicken	272	19.8%	81	663	Yum! Brands	USA	1993
4	3	Burger King	Burger	267	5.1%	72	612	Burger King	USA	2010
5	2	Shokoladnitsa	Coffee	256	-1.2%	23	366	Shokoladnitsa	Russia	2001
6	6	Kroshka-Kartoshka	Potato	176	-18.9%	16	218	Kroshka-Kartoshka	Russia	1998
7	7	Teremok	Crepes	151	0.7%	134	293	Teremok	Russia	1998
8	9	Tea Funny	Tea	132	23.4%%	73	444	Tea Funny World	Russia	2011
9	8	Subway	Sandwich	116	-8.7%	58	592	Subway	USA	1994
10	10	Domino's Pizza	Pizza	102	6.3%	4	141	Domino's Pizza	USA	1998
11	12	Starbucks	Coffee	95	13.1%	14	126	Starbucks/Alshaya Group	USA	2007
12	11	Prime Star	Sandwich	94	9.3%	0	94	Novikov Group	Russia	2005
13	17	Papa John's	Pizza	88	54.4%	21	163	Papa John's	USA	2003
14	12	Baskin Robbins	Ice-cream	84	0.0%	6	350	BRPI	USA	1992
15	15	IL Patio	Italian	77	8.5%	6	113	Rosinter Restaurants	Russia	1993
16	16	Yakitoria	Asian	69	1.4%	3	89	Vesta Center International	Russia	1999
17	14	Coffee House	Coffee	67	-14.1%	15	84	Shokoladnitsa	Russia	1999
18	20	Double B	Coffee	63	16.7%	4	75	Double B	Russia	2012
19	18	Tanuki	Asian	55	0.0%	0	64	Tanuki-Ersh	Russia	2004
20	(-)	Cofix	Coffee	54	237.5%	7	64	Cofix	Israel	2016
		Total		**2,885**	**6.6%**	**621**	**6,241**			

Status: July 2018 * St. Petersburg — Source: FoodService Russia

St. Petersburg: Top 20 foodservice brands mid 2018

– Number of Units (Company owned & franchising) –

R	('17)	Brand	Concept	St. P.*	Vs. 2017	Moscow	Russia	Group	Origin	Start in Russia
1	1	Teremok	Crepes	134	0.7%	151	293	Teremok	Moscow	1998
2	3	McDonald's	Burger	84	9.1%	277	655	Eurasia	USA	1990
3	5	KFC	Chicken	81	15.7%	272	663	McDonald's	USA	1993
4	2	Eurasia	Asian	80	-8.0%	0	80	Tea Funny World	St. P.*	2001
5	4	Tea Funny	Tea	73	1.4%	132	444	Yum! Brands	Russia	2011
6	6	Burger King	Burger	72	5.0%	267	612	Burger King	USA	2010
7	8	Volchek Bakeries	Bakery	71	44.9%	0	71	Volchek Bakeries	St. P.*	2013
8	7	Subway	Sandwich	58	0.0%	116	592	Subway	USA	1994
9	10	Tokyo City	Asian	40	8.1%	2	42	Shokoladnitsa	St. P.*	2005
10	11	Bushe	Bakery	39	11,4%	1	40	Tokyo City	St. P.*	1999
11	19	Tseh 85	Bakery	37	105.6%	0	37	Bushe	St. P.*	2016
12	14	Pizza Ollis	Italian	30	11.1%	0	30	Coffeeshop Co./Coffee Set	St. P.*	2004
13	15	Coffee Like	Coffee	26	18.2%	12	348	Kroshka-Kartoshka	Izhevsk	2013
13	12	Coffeeshop Company	Coffee	26	-10.3%	26	87	Pizza Ollis	Austria	2008
15	15	Shokoladnitsa	Coffee	23	4.5%	256	366	Coffee Like	Moscow	2001
16	17	Stolle	Pie	22	4.8%	28	108	Shokoladnitsa	St. P.*	2002
17	(-)	Papa John's	Pizza	21	162.5%	88	163	Stolle	USA	2003
18	18	Dve Palochki	Asian	19	-5.,0%	6	25	Food Retail Group	St. P.*	2003
19	(-)	British Bakery	Bakery	18	20.0%	0	18	Tseh 85	St. P.*	1997
20	20	Mama Roma	Italian	17	0.0%	0	26	Wasabi	St. P.*	1998
		Total		**971**	**10.0%**	**1,634**	**4,700**			

Status: July 2018 * St. Petersburg — Source: FoodService Russia

RUSSIA TOP 30

Russia: between coffee & delivery

Within the past twelve months, Russia's 50 largest restaurant groups increased their total unit count by 10.5%, almost repeating the results of the previous year's Top-40 ranking. The market is in motion. What are the major drivers?

Research and analysis by Julia Matveeva, editor-in-chief of Foodservice magazine Russia.

According to official figures, in 2018 the Russian eating away-from-home market grew by 4.2% in comparable prices reaching RUB1,527 bn (€20.6 bn), thus continuing the positive trend started the year before (2017: +3.2%). From January to September 2019, the foodservice market volume went on expanding, showing a 4.7% growth. However, this impressive growth comes from a limited number of segments and concept types, while other traditional restaurant formats stagnate, if not decline.

Mad about coffee

The number one winners are small coffee bars selling cheap coffee to go, the price of a cappuccino often starting at less than one euro. The demand for coffee, especially on the go, keeps on growing tremendously, turning it into the most wanted drink in the foodservice market. According to the NPD Group, coffee has become the number 2 bestselling product in Russia's QSR restaurants losing only to burgers, whereas beverages typically considered to be the best pair for fast food items fall into fourth place behind French fries. Not surprisingly, every three out of four foodservice concepts in the big Russian cities now heavily try to offer and promote coffee to go. And no wonder. Dozens of small concepts with very small menus and without, or with only very limited seating are popping up, making coffee to go their core offer and growing rapidly into chains – not seldom counting 100+ units countrywide, sometimes within just one or two years. Their turnover is not comparable to the sales volume of traditional coffee bars, but the required investment is much low-

Rusia

Russia: Top 50 Restaurant Operators mid 2019

Number of units (company owned & franchising) *

R	('18)	Group	Russia	vs. 2018	Moscow	Brands	Categories	Brand origin	Start in Russia
1	(1)	Marcon	1,098	6.1%	354	Stardog!s	Street + QSR	Russia	1993
2	(3)	Yum! Brands Russia	805	21.4%	318	KFC	QSR	USA	1993
3	(4)	Burger King	695	13.5%	294	Burger King	QSR	USA	2010
4	(2)	McDonald's	689	3.6%	284	McDonald's, McCafé	QSR	USA	1990
5	(9)	Coffee Like	583	67.5%	26	Coffee Like	QSR	Russia	2013
6	(5)	Subway	578	-2.4%	116	Subway	QSR	USA	1994
7	(7)	Tea Funny World	501	12.8%	172	Tea Funny, Kinoeshki	QSR	Russia	2011
8	(10)	Dodo Pizza	433	41.0%	118	Dodo Pizza	QSR	Russia	2011
9	(6)	Shokoladnitsa	424	-10.2%	322	Shokoladnitsa, Coffee House, Vabi Sabi, etc.	QSR + Casual	Russia	2001
10	(8)	BRPI**	330	-5.7%	80	Baskin Robbins	QSR	USA	1992
11		Teremok	315	7.5%	168	Teremok	QSR	Russia	1998
12	(14)	Amrest	251	16.7%	71	KFC, Pizza Hut	QSR	USA	2007
13	(12)	Rosinter Restaurants	247	-0.4%	179	IL Patio, Planeta Sushi, T.G.I. Friday's, Costa Coffee, etc.	Casual	Russia, USA, UK	1993
14	(15)	GK Arkadiy Novikov	224	12.0%	207	Novikov, Prime Star, Krispy Kreme, etc.	Fine + Casual + QSR	Russia	1992
15	(13)	Kroshka-Kartoshka	212	-2.8%	170	Kroshka-Kartoshka	Street + QSR	Russia	1998
16	(18)	Papa John's	199	22.0%	98	Papa John's	QSR	USA	2003
17	(-)	Coffee Way	194	59.0%	66	Coffee Way	QSR	Russia	2008
18	(-)	Dim Coffee	188	6.2%	-	Dim Coffee	QSR	Russia	2013
19	(21)	Domino's Pizza	187	32.6%	157	Domino's Pizza	QSR	USA	1998
20	(-)	SushiVesla	185	-11.9%	4	SushiVesla, BlinBerry, PizzaCup, etc.	QSR	Russia	2012
21	(17)	Mega Group	171	0.6%	32	Cinnabon, Auntie Anne's, Hesburger	QSR	USA	2009
22	(19)	Podorozhnik	155	-1.9%	0	Podorozhnik	Street+ QSR	Russia	1995
23	(16)	Bodryi Den	151	-12.7%	40	Bodryi Den	QSR	Russia	2012
24	(22)	Alshaya Group	143	10.9%	102	Starbucks, Shake Shack	QSR	USA	2007
25	(35)	Cofix	138	122.6%	119	Cofix	QSR	Israel	2016
26	(20)	Grand Food	126	-14.9%	14	Tashir Pizza, Kebab Toon, etc.	QSR + Casual	Russia	2001
27	(34)	Volchek Bakeries	107	44.6%	0	Volchek Bakeries, Coffeevarim	QSR	Russia	2013
28	(-)	Uncle Dener	105	-12.6%	-	Uncle Dener	Street	Russia	2009
29	(-)	One Price Coffee	101	261.0%	83	One Price Coffee, Onebucks Coffee	QSR	Russia	2016
30	(29)	Restart Vasilchuk Brothers	100	16.3%	90	Chaihona # 1, ObedBufet, Plovberry, etc.	QSR + Casual	Russia	2001
31	(25)	Yakitoria	103	-0.9%	84	Yakitoria, Menza, etc.	Casual	Russia	1995
32	(26)	Traveler's Coffee	93	-8.8%	9	Traveler's Coffee	Casual	Russia	1997
33	(24)	Stolle	88	-4.3%	26	Stolle	QSR	Russia	2002
34	(23)	Ginza Project	85	-22.7%	31	MariVanna, DzhonDzholi, Jamie's Italian, etc.	Fine + Casual	Russia	2000
35	(30)	Eurasia	80	0.0%	0	Eurasia	Casual	Russia	2001
36	(31)	Double B	78	4.0%	69	Double B	QSR	Russia	2012
36	(32)	Harat's	78	6.8%	7	Harat's, Kioto, etc.	Casual	Russia	2009
38	(28)	Coffeeshop Company	76	-12.6%	20	Coffeeshop Company	Casual	Russia/Austria	2008
39	(27)	Alendvic	75	-16.7%	0	SFC-Express, Viva la Pizza, Pelmeshki da Vareniki, etc.	QSR + Casual	Russia	1993
40	(37)	New York Pizza/ Kuzina	73	21.7%	8	New York Pizza, Kuzina	QSR	Russia	1996
41	(33)	Tanuki-Ersh	71	-1.4%	63	Tanuki, Ersh	Casual	Russia	2001
41	(36)	Foodmaster	71	16.4%	0	Vilka-Lozhka, Pechki-Lavochki, etc.	QSR	Russia	1997
43	(-)	SRP Group	69	21.0%	4	Shashlykoff	Casual	Russia	2009
44	(-)	Pravda Coffee	68	36.0%	64	Pravda Coffee	QSR	Russia	2001
44	(39)	Tokyo City	68	19.3%	3	Tokyo City	Casual	Russia	2005
46	(38)	Malakhite	61	5.2%	9	Paul Bakery, Doner Kebab, etc.	QSR	Russia	1994
47	(40)	Maison Dellos	52	0.0%	52	Mu-Mu, Cafe Pushkin, Matreshka, etc.	QSR + Fine	Russia	1996
47	(-)	Tseh 85	52	40.5%	0	Tseh 85	QSR	Russia	2016
49	(-)	Pomponchik	51	21.4%	34	Pomponchik	QSR	Russia	2011
50	(-)	Bushe	47	17.5%	2	Bushe, etc.	QSR	Russia	1999
		Total	**11,074**	**10.5%**	**4,169**				

** Status: July 2019, ** estimate*

Source: Foodservice Russia

er and hence the pay-off period shorter. The tremendous speed at which they grow proves that there is still big demand for such kinds of low-budget concepts from both consumers and potential franchisees, who want to take a stab at the foodservice industry. This year's top-50 list includes seven companies of this kind, and a look at the growth stars reveals that five out of the ten absolute growth leaders – One Price Coffee (+261%), Cofix (+122.6%), Coffee Like (+67.5%), Coffee Way (+59%) and Pravda Coffee (+36%) – benefit from this mini-format.

Delivery boom

Another winning category this year in Russia, like in many other countries worldwide, is delivery. As pizza remains the most popular product for delivery, pizza delivery chains, among them international giants Domino's Pizza (+32.6%) and Papa John's (+22%), as well as the local market leader Dodo Pizza (+ 41%), go on opening new restaurants – mostly by efforts of their numerous franchisees – and record another year of double-digit growth. However, these are not the real heroes of 2019, but third-party providers boasting enormous growth rates. The current leader in the local food delivery business, Delivery Club owned by Mail.ru Group, one of the largest companies in the Russian-speaking Internet market, reported 191.1% year-over-year growth in Q3 2019 to RUB1,244 m (€17.6 m). For the first time, their quarterly revenue has exceeded RUB1 bn and the business is firmly on track to double revenues in 2019. Delivery Club reached a new milestone of 3 m monthly orders in September 2019, just five months after it had reached 2 m orders. The service is currently present in 120+ Russian cities and continues its rollout across local QSR, including a new partnership with Pizza Hut as well as significant expansion across existing partners, among them McDonald's, KFC and Burger King. Last but not least, Delivery Club has recently announced target opening of its first dark kitchens in Moscow together with the well-known local restaurant entrepreneur Arkadiy Novikov. Together they will open 24 restaurants specifically for online orders with six dark kitchens to be launched by the end of this year. All in all, food delivery, both from restaurants and supermarkets, dark kitchens and dark stores, is now considered to be a very promising market with a huge growth potential and attracts serious investors from the IT and banking sectors.

Changes within the Big Three

Altogether Russia's 50 largest foodservice groups, all of them operating more than 45 corporate and franchised units, increased their market presence by 10.5% within twelve months between July 2018 and July 2019 (2018: 10.6%; 2017: 10.1%; 2016: 2.9%). 31 of the top 50 companies added new outlets to their portfolio, whereas 17 players decreased their unit presence. Symbolic as it may seem, there isn't a single group operating casual dining restaurants among this year's growth leaders. Just like in previous years, the biggest growth potential comes from the fast food operators whose offer is affordable to most Russian consumers, even in smaller cities where the average salary cannot compare to the ones in Moscow and St. Petersburg. Regional growth is what the major QSR players have been busy with for the last couple of years. While the market in Moscow is more or less saturated, there's still a lot of potential for fast food giants in the cities with 50,000+ inhabitants.

2019, however, brought changes to the long-established list of leaders in the QSR sector. While McDonald's slowed down its expansion a bit, concentrating on the renovation of existing restaurants and the implementation of new technologies, KFC and Burger King continued their growth throughout the country. As a result, both chains have finally outranked McDonald's in the number of units. In July 2019, KFC had 805 restaurants in Russia (mid 2018: 663), only 45 of them company-owned, all others franchised. Burger King operated 695 units (2018: 612), all franchised, while McDonald's counted 689 restaurants (2018: 665), most of them company-owned.

Top 10 Growth Stars*

R	(R**)	Group	Categories	absolute, no. of units
1	(5)	Coffee Like	QSR	235
2	(2)	Yum! Brands	QSR	142
3	(8)	Dodo Pizza	QSR	126
4	(3)	Burger King	QSR	83
5	(25)	Cofix	QSR	76
6	(29)	One Price Coffee	QSR	73
7	(1)	Marcon	QSR	63
8	(7)	Tea Funny	QSR	57
9	(19)	Domino's Pizza	QSR	46
10	(251)	Amrest	QSR	36
10	(16)	Papa John's	QSR	36

R	(R**)	Group	Categories	relative, %
1	(29)	One Price Coffee	QSR	261.0
2	(25)	Cofix	QSR	122.6
3	(5)	Coffee Like	QSR	67.5
4	(17)	Coffee Way	QSR	59.0
5	(27)	Volchek Bakeries	QSR	44.6
6	(8)	Dodo Pizza	QSR	41.0
7	(47)	Tseh 85	QSR	40.5
8	(44)	Pravda Coffee	QSR	36.0
9	(19)	Domino's Pizza	QSR	32.6
10	(16)	Papa John's	QSR	22.0

*Number of unit dynamics July 2019 vs. July 2018 within Top 50,
**R in Top 50
Source: Foodservice Russia

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RUSSIA TOP 30

St. Petersburg: Top 20 Foodservice Brands mid 2019

Number of units (company owned & franchising)

R	('18)	Brand	Concept	St. Peters-burg	vs. 2018	Moscow	Russia	Group	Origin	Start in Russia
1	(1)	Teremok	Crepes	139	3.7%	168	315	Teremok	Moscow	1998
2	(7)	Volchek Bakeries	Bakery	93	31.0%	0	93	Volchek Bakeries	St. Petersburg	2013
3	(3)	KFC	Chicken	91	12.3%	318	805	Yum! Brands	USA	1993
4	(5)	Tea Funny	Tea	89	21.9%	172	501	Tea Funny World	Russia	2011
5	(2)	McDonald's	Burger	82	-2.4%	284	689	McDonald's	USA	1990
6	(4)	Eurasia	Asian	80	0.0%	0	80	Eurasia	St. Petersburg	2001
7	(6)	Burger King	Burger	77	6.9%	294	695	Burger King	USA	2010
8	(8)	Subway	Sandwich	66	13.8%	116	578	Subway	USA	1994
9	(-)	Stardog!s	Hot dog	53	530.0%	354	1098	Marcon	Russia	1993
10	(11)	Tseh 85	Bakery	52	40.5%	0	52	Tseh 85	St. Petersburg	2016
11	(13)	Coffee Like	Coffee	48	84.6%	26	583	Coffee Like	Izhevsk	2013
12	(9)	Tokyo City	Asian	46	15.0%	3	49	Tokyo City	St. Petersburg	2005
13	(10)	Bushe	Bakery	36	-7.7%	2	38	Bushe	St. Petersburg	1999
14	(-)	Dodo Pizza	Pizza	32	23.1%	118	433	Dodo Pizza	Syktyvkar	2011
15	(-)	Domino's Pizza	Pizza	32	320.0%	157	187	Domino's Pizza	USA	1998
16	(-)	Ludi Lubyat	Bakery	24	71.4%	157	24	Ludi Lubyat	St. Petersburg	2016
17	(16)	Stolle	Pie	22	0.0%	0	88	Stolle	St. Petersburg	2002
17	(17)	Papa John's	Pizza	22	4.8%	98	199	Papa John's	USA	2003
19	(13)	Coffeeshop Company	Coffee	20	-23.0%	20	76	Coffeeshop Company/ Coffee Set	Austria	2008
19	(-)	Starbucks	Coffee	20	42.6%	99	140	Alshaya Group	USA	2007
		Total		**1,124**	**22.4%**	**2,255**	**6,723**			

Status: July 2019 *Source: Foodservice Russia*

The international QSR operators try to attract two opposite types of consumers in Russia: those who look for the cheapest available options and those who can afford more and are ready to move to fast casual for fresher concepts and trendier/healthier ingredients. Hence, gourmet burgers feature along with low-margin promo items for just RUB49 (€0.69) on their menus. At the same time, fast food giants bank on delivery, where for example McDonald's offers not only food, but also coffee an this way broadens its customer base.

Casual dining under pressure

As for casual dining chains, most of them are left in quite an unfortunate position. While the purchasing capacity of the middle class in Russia does not grow, or even declines, competition in the restaurant industry gets more and more severe, with new types of trendy concepts, formats and services coming into the market every year, aiming for a slice of the same pie. It's not only the various delivery options, but also the food-hall boom that drives customers away from traditional casual dining chains. In St. Petersburg there's still space in the market for the multiplication of inexpensive bakery chains (with Volchek Bakeries and Tseh 85 leading the niche) and small sophisticated gastro-bars launched by young ambitious chefs. But Moscow has totally submitted to food-halls and gastro-markets: more than 20 locations of that kind have opened within past two years, each of them offering a wide range of fast-casual and sometimes casual-dining concepts under one roof. The trend culminated in the opening of Depo Moscow last February. The largest food-mall in Europe attributes an area of more than11,000 sq m to 140 food counters and 75 restaurant concepts. Half of them are operated by young entrepreneurs, the other half belong to mature restaurant operators, who followed the market energy and hurried over to get a corner in what turned out to become the most talked about and visited food venue in Russia in 2019.

Moscow: Top 20 Foodservice Brands mid 2019

Number of units (company owned & franchising, Moscow + Moscow region)

R	('18)	Brand	Concept	Moscow	vs. 2018	St. Peters-burg	Russia	Group	Origin	Start in Russia
1	(1)	Stardog!s	Hot dog	354	-9.2%	53	1,098	Marcon	Russia	1993
2	(3)	KFC	Chicken	318	16.9%	142	805	Yum! Brands	USA	1993
3	(4)	Burger King	Burger	294	10.1%	77	695	Burger King	USA	2010
4	(2)	McDonald's	Burger	284	10.8%	82	689	McDonald's	USA	1990
5	(5)	Shokoladnitsa	Coffee	249	-2.7%	14	338	Shokoladnitsa	Russia	2001
6	(8)	Tea Funny	Tea	172	30.3%	57	501	Tea Funny World	Russia	2011
7	(6)	Kroshka-Kartoshka	Potato	170	-3.4%	15	212	Kroshka-Kartoshka	Russia	1998
8	(7)	Teremok	Crepes	168	11.3%	139	315	Teremok	Russia	1998
9	(10)	Domino's Pizza	Pizza	157	53.9%	32	187	Domino's Pizza	USA	1998
10	(20)	Cofix	Coffee	119	120.4%	13	138	Cofix	Israel	2016
11	(-)	Dodo Pizza	Pizza	118	59.5%	32	433	Dodo Pizza	Russia	2011
12	(9)	Subway	Sandwich	116	0.0%	66	578	Subway	USA	1994
13	(11)	Starbucks	Coffee	99	4.2%	20	140	Starbucks/Alshaya Group	USA	2007
13	(12)	Prime Star	Sandwich	99	5.3%	0	99	Novikov Group	Russia	2005
15	(13)	Papa John's	Pizza	98	11.4%	22	199	Papa John's	USA	2003
16	(14)	Baskin Robbins*	Ice-cream	80	-4.8%	6	330	BRPI	USA	1992
17	(15)	IL Patio	Italian	77	0.0%	6	112	Rosinter Restaurants	Russia	1993
18	(16)	Yakitoria	Asian	69	0.0%	3	86	Vesta Center International	Russia	1999
19	(-)	Coffee Way	Coffee	66	50.0%	5	194	Coffee Way	Russia	2008
20	(18)	Double B	Coffee	65	3.2%	4	74	Double B	Russia	2012
		Total		**3,172**	**10.1%**	**788**	**7,223**			

*Status: July 2019, * estimated*

Source: Foodservice Russia

TOP 50 RUSSIA

Navigating the pandemic waves

In 2020, Russia's hospitality sector has faced unprecedented challenges, like many other countries have. The country had to pass a stress test not every entrepreneur or company may survive. Julia Matveeva, editor in chief of Foodservice magazine Russia, reports on the situation in the Russian restaurant industry during the pandemic year.

Within the first three quarters of 2020, comparable out-of-home sales fell by 22.8% to RUB947.4 bn (€11.5 bn) in Russia compared to a 4.7% rise to RUB1,192 bn (€13,08 bn) in the same period in 2019. The national lockdown, when all foodservice units were allowed to provide take-away and delivery only, started at the end of March and lasted three to five months, the time differing according to regions. While restaurants in Moscow were allowed to reopen indoor dining on 23th June, in St. Petersburg they only started to serve meals on the summer terraces again at the end of June and it took another month for a full-scale restart. In the Saratov region, restaurant dining rooms opened to guests again on 27th August.

Foodservice market turnover reached its lowest point in April and May, falling by 52 to 53%, according to official data from the Russian Statistics Agency (Rosstat). NPD Group Russia, however, estimates the bottom line of the market decline to be much lower, at 25% of the pre-pandemic volume. At the beginning of autumn, the situation looked much better: total foodservice sales fell by only 14% in September 2020 compared to September 2019, according to Rosstat. But with the start of the second wave of the Covid pandemic in late September, October and November restaurant operators were facing falling sales once again.

Rusia

Russia: Top 50 restaurant operators, Oct. 2020

Number of units (company owned & franchising)*

R	'19	Group	Russia	vs. 2019	Moscow	Brands	Categories	Brand origin	Start in Russia
1	2	Yum! Brands Russia	965	19.9%	380	KFC	QSR	USA	1993
2	1	Marcon	932	-15.1%	408	Stardogs	Street + QSR	Russia	1993
3	4	McDonald's	759	10.2%	320	McDonald's, McCafé	QSR	USA	1990
4	3	Burger King	750	7.9%	295	Burger King	QSR	USA	2010
5	5	Coffee Like	713	22.3%	26	Coffee Like	QSR	Russia	2013
6	8	Dodo Brands	550	27.0%	153	Dodo Pizza, Drinkit, Doner 42	QSR	Russia	2011
7	7	Tea Funny World	511	2.0%	180	Tea Funny, Kinoeshki	QSR	Russia	2011
8	6	Subway Russia	468	-19.0%	92	Subway	QSR	USA	1994
9	9	Shokoladnitsa	327	-22.9%	259	Shokoladnitsa, Coffee House, Vabi Sabi, etc.	QSR + Casual	Russia	2001
10	11	Teremok-Invest	311	-1.3%	167	Teremok	QSR	Russia	1998
11	12	Amrest	267	6.4%	58	KFC, Pizza Hut	QSR	USA	2007
12	14	Novikov Group	241	7.6%	214	Novikov, Prime Star, Krispy Kreme, Farsh, etc.	Fine + Casual + QSR	Russia	1992
13	13	Rosinter Restaurants	227	-8.1%	160	IL Patio, Planeta Sushi, T.G.I. Friday's, Costa Coffee, etc.	Casual	Russia	1993
14	-	Robin Sdobin	222	21.3%	0	Robin Sdobin	QSR	Russia	2000
15	16	Papa John's	216	8.5%	86	Papa John's	QSR	USA	2003
16	18	Dim Coffee	204	8.5%	0	Dim Coffee	QSR	Russia	2013
17	17	Coffee Way	200	3.1%	62	Coffee Way	QSR	Russia	2008
17	15	Kroshka-Kartoshka	200	-5.7%	150	Kroshka-Kartoshka	QSR	Russia	1998
19	19	Domino's Pizza	196	4.8%	169	Domino's Pizza	QSR	USA	1998
20	21	Mega Group	192	12.3%	53	Cinnabon, Auntie Anne's, Hesburger, Godfather's Pizza	QSR	USA	2009
21	25	Cofix	184	33.3%	165	Cofix	QSR	Israel	2016
22	20	SushiVesla	170	-8.1%	5	SushiVesla, BlinBerry, PizzaCup, etc.	QSR	Russia	2012
23	29	One Group Company	158	56.4%	119	One price coffee, One bucks coffee	QSR	Russia	2016
24	22	Podorozhnik	155	0.0%	0	Podorozhnik	Street+ QSR	Russia	1995
25	23	Bodryi Den	141	-10.0%	23	Bodryi Den	QSR	Russia	2012
26	24	Coffee Siren	139	-2.8%	101	Starbucks	QSR	USA	2007
27	27	Volchek Bakeries	127	18.7%	0	Volchek Bakeries, Coffeevarim	QSR	Russia	2013
28	29	Uncle Dener	119	13.3%	0	Uncle Dener	Street	Russia	2009
29	26	Grand Food	115	-8.7%	7	Tashir Pizza, Kebab Toon, etc	QSR + Casual	Russia	2001
30	31	Yakitoria	98	-4.9%	87	Yakitoria, Menza, etc.	Casual	Russia	1995
31	30	Restart Vasilchuk Brothers	97	-7.6%	80	Vasilchuki Chaihona No1, Plovberry, Burger Heroes, etc.	QSR + Casual	Russia	2001
32	47	Tseh85	93	78.8%		Tseh85, Sisters, etc.	QSR	Russia	2016
33	-	SurfCoffee	88	n/a	30	SurfCoffee	QSR	Russia	2010
34	33	Stolle	85	-3.4%	22	Stolle	QSR	Russia	2002
35	-	SVSH (Samaya Vkusnaya Shaurma)	83	167.7%	0	SVSH (Samaya Vkusnaya Shaurma)	QSR	Russia	2015
36	32	Traveler's Coffee	80	-14.0%	4	Traveler's Coffee	QSR	Russia	1997
37	34	Ginza Project	78	-8.2%	27	MariVanna, DzhonDzholi, Jamie's Italian, etc.	Fine + Casual	Russia	2000
38	45	SRP Group	76	18.8%	5	Shashlykoff	Casual	Russia	2009
39	40	New York Pizza/Kuzina	75	2.7%	12	New York Pizza, Kuzina	QSR	Russia	1996
40	36	Harat's Russia	74	-5.1%	8	Harats, MyWay, etc.	Casual	Russia	2009
41	41	Tanuki-Ersh	73	2.8%	66	Tanuki, Ersh	Casual	Russia	2001
42	44	Pravda Coffee	71	4.4%	70	Pravda Coffee	QSR	Russia	2001
43	44	Tokyo City	70	2.9%	3	Tokyo City, Bakhroma, etc.	Casual	Russia	2005
44	50	Bushe	67	42.6%	7	Bushe, etc.	QSR	Russia	1999
45	36	Double B	66	-15.4%	61	Double B	QSR	Russia	2012
46	35	Eurasia	65	-18.8%	0	Eurasia	Casual	Russia	2001
47	39	Alendvic	63	-16.0%	0	SFC-Express, Viva la Pizza, Pelmeshki da Vareniki, etc.	QSR	Russia	1993
47	41	Foodmaster	63	-11.3%	0	Vilka-Lozhka, Riba-Ris, etc.	QSR	Russia	1997
47	-	Take and Wake Coffee Company	63	3.3%	44	Take and Wake	QSR	Russia	2014
50	49	Vremya Est	55	7.8%	36	Pomponchik	QSR	Russia	2011
		Total	**10,377**	**-6.3%**	**3,834**				

*as of October 2020

Source: Foodservice Russia

TOP 50 RUSSIA

There is currently no lockdown in Russia (as of the end of November 2020), but there are certain limitations for restaurant operations that vary from region to region. In Moscow, for instance, the dining rooms of all restaurants, bars and clubs must remain shut from 11 pm to 6 am, while in St. Petersburg all foodservice outlets in shopping malls have closed completely since 23rd November, in addition to the overall night curfew. At the same time, foodservice operators in Moscow are strictly recommended to launch a QR-code check-in showing if a guest has been in contact with a Covid-positive person. Many chains like McDonald's and IKEA as well as some independent operators have already implemented such check-in options. In case the situation does not change dramatically by the end of the year, NPD Group forecasts a year-on-year decline in Russian foodservice sales of 23% for 2020.

Top 10 growth stars*

R	R**	Group	Categories	absolute, no. of units
1	1	Yum! Brands Russia	QSR	160
2	5	Coffee Like	QSR	130
3	6	Dodo Brands	QSR	117
4	3	McDonald's	QSR	70
5	23	One Group Company	QSR	57
6	4	Burger King	QSR	55
7	35	SVSH (Samaya Vkusnaya Shaurma)	QSR	52
8	21	Cofix	QSR	46
9	32	Tseh85	QSR	41
10	14	Robin Sdobin	QSR	39

R	R**	Group	Categories	relative
1	35	SVSH (Samaya Vkusnaya Shaurma)	QSR	167.7%
2	32	Tseh85	QSR	78.8%
3	23	One Group Company	QSR	56.4%
4	44	Bushe	QSR	42.6%
5	21	Cofix	QSR	33.3%
6	6	Dodo Brands	QSR	27.0%
7	5	Coffee Like	QSR	22.3%
8	14	Robin Sdobin	QSR	21.3%
9	1	Yum!	QSR	19.9%
10	38	SRP Group	QSR	18.8%

*Number of unit dynamics October 2020 vs. July 2019 within Top 50
**R in Top 50
Source: Foodservice Russia

The pandemic, however, has affected the various foodservice sectors in different ways. The biggest QSR players with their strong financial capacity and well-established delivery service, managed to adapt faster and better than other operators. Burger King and KFC were the first to launch click&collect services to push contactless take-away and McDonald's profited from the many drive-in restaurants in the company's portfolio, which became an unbeatable USP during the lockdown months.

In July, when lockdown restrictions were lifted in many Russian regions, QSR sales declined by only 9% over July 2019 and in September they almost reached their pre-pandemic level. At the same time, coffee bars saw sales drop by 34% in July 2020 and full-service restaurants, which were hit hardest by the coronavirus pandemic, witnessed a sales decline of 41% in July and of around 20% in September, NPD Group reports.

Another concept customers felt rather safe with were cafes at petrol stations, which were mostly registered as retail units and were thus able to remain open during the lockdown months, with tables and seats put away. Changing their main OKVED code (the code for the Russian classification of economic activities) to product retail also turned out to be a solution to remain open for some bakery cafe chains that managed to react and adjust quickly to the rules of the new reality. A few fast food chains did the same, for example Vlavashe from St. Petersburg, which focuses on shawarma and lavash wraps with various filings.

But most operators were forced to push delivery services, or launch them as soon as possible. However, for many restaurant concepts, introducing delivery was just a way to keep at least part of their staff busy rather than making a profit. The average delivery check is usually higher than the in-store one, but the number of orders is a lot lower than with regular customer traffic. After the lockdown ended, for many operators the share of delivery of total sales dropped back to the pre-pandemic 1 to 5%, yet they keep it the concept in case there is another lockdown.

The real winners in the pandemic where third-party delivery providers whose services became essential for all restaurant entrepreneurs over night. At the beginning of September, Delivery Club, the largest player in the Russian restaurant delivery sector, owned by Sberbank and Mail.ru Group, counted 30,500 restaurants among its partners, twice as many as it had in February. The company's turnover grew 2.9 times to RUB2.5 bn (€27,4 m) in the second quarter and 2.1 times to RUB2.6 bn (€28,5 m) in the third quarter of the year compared to the same periods in 2019.

Another essential step many restaurant operators took after the pandemic started, was to look for opportunities in retail in order to diversify their business. Chains with central production facilities like Shokoladnitsa coffee bars, AnderSon family

Moscow: Top 20 foodservice brands, Oct. 2020

Number of units (company owned & franchising, Moscow + Moscow region)

R	'19	Brand	Concept	Moscow	vs. 2019	St. Peters-burg	Russia	Group	Origin	Start in Russia
1	1	Stardogs	Hot dog	408	15.3%	53	932	Marcon	Russia	1993
2	2	KFC	Chicken	380	19.5%	101	965	YUM!	USA	1993
3	4	McDonald's	Burger	320	12.7%	85	759	McDonald's	USA	1990
4	3	Burger King	Burger	295	0.3%	85	750	Burger King	USA	2010
5	5	Shokoladnitsa	Coffee	219	-12.0%	10	281	Shokoladnitsa	Russia	2001
6	6	Tea Funny	Tea	180	4.7%	91	521	Tea Funny World	Russia	2011
7	9	Domino's Pizza	Pizza	169	7.6%	3	196	Domino's Pizza	USA	1998
8	8	Teremok	Crepes	167	-0.6%	3	311	Teremok-Invest	Russia	1998
9	10	Cofix	Coffee	165	38.7%	19	184	Cofix	Israel	2016
10	11	Dodo Pizza	Pizza	151	28.0%	56	548	Dodo Brands	Russia	2011
11	7	Kroshka-Kartoshka	Potato	150	-11.8%	9	200	Kroshka-Kartoshka	Russia	1998
12	-	One price coffee	Coffee	106	79.7%	30	145	One Group Company	Russia	2016
13	13	Starbucks	Coffee	101	2.0%	18	139	Coffee Siren	USA	2007
14	13	Prime	Sandwich	98	-1.0%	0	98	Novikov Group	Russia	1992
15	12	Subway	Sandwich	92	-20.7%	48	468	Subway Russia	USA	1994
16	15	Papa John's	Pizza	86	-12.2%	17	216	Papa John's	USA	2003
17	18	Yakitoria	Asian	71	2.9%	0	87	Yakitoria	Russia	1995
18	-	Pravda Coffee	Coffee	70	9.4%	1	71	Pravda Coffee	Russia	2001
18	17	IL Patio	Italian	70	-9.1%	4	104	Rosinter Restaurants	Russia	1993
20	19	Coffee Way	Coffee	62	-6.1%	5	200	Coffee Way	Russia	2008
		Total		**3,360**	**5.9%**	**638**	**7,175**			

As of October 2020

Source: Foodservice Russia

cafes or Grabli fast casual restaurants were among the companies profiting from the new situation. Producing ready-to-eat or ready-to-cook meals for supermarket chains, selling frozen semi-finished products or branded coffee beans at online marketplaces became an additional sales channel for these companies. Their retail share of total turnover is still quite smal, but the potential market capacity is huge.

Operating restrictions, the drop in demand and sales, complicated negotiations with landlords, who were not always willing to change rental contract conditions, growing debt to suppliers and tax authorities, the lack of financial support from the government (though widely announced but hard to get and indeed very slight) made many companies reduce their assets. Russia's 50 largest restaurant groups, all of them operating 55 or more corporate and franchised outlets, reduced their total number of units by 6.25% in 2020 (2019: +10.5%; 2018: +10.6%; 2017: +10.1%). 20 groups among the Top 50 cut their store count, among them Subway, Rosinter Restaurants, Kroshka Kartoshka, Teremok, Shokoladnitsa and the former ranking leader Marcon, now second after Yum! Brands.

Among this year's growth leaders there is not a single company operating casual dining restaurants. Yum! Brands (+160 KFC restaurants), Coffee Like (+130) and Dodo Brands (+117), prove to be the most pandemic-resistant types of concepts in Russia: international fast food brands, mini coffee bars selling coffee to go and pizza delivery. One should add small shawarma units such as SWSH (Samaya Vkusnaya Shaurma – *The Tastiest Shawarma*, +167.74%) and cheap bakery cafes like Tseh85 (+78.85%) with an average check of just RUB230 (€2.8) to get a full picture of the concepts that can overcome pandemic shocks more or less steadily. Inexpensive products appropriate for delivery or take-away represent the best offer and concept core. And franchising is and will definitely remain the most popular growth model for the next years. For instance, Dodo Pizza, which recently entered the German market, has only 28 corporate units among its 548 restaurants in Russia, and Yum! Brands has 72 corporate restaurants out of 965 KFC units.

Meanwhile, most restaurant operators are preparing for a long and difficult winter. It is already clear that there will not be the usual sales boom in December because of the growing number of Covid cases and a new round of restrictions. Adapting to the new reality seems to be a long, painful and unpredictable process leaving many entrepreneurs stressed and frustrated and looking to the coming year 2021 with anxiety.

Internacional

Desaparición de las marcas de restauración en Rusia

Fruto del conflicto con Ucrania, sólo Rosinter capea la crisis.
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Las marcas internacionales de restauración están sufriendo un serio revés en Rusia, como consecuencia del conflicto territorial con Ucrania. Lejos quedan las perspectivas de su gran expansión, fruto de la perestroika que llevó a que, en Moscú, se tomaran Big Mac en 1990 o que Gorbachov fuera capaz de ser actor de un **controvertido spot de Pizza Hut, en 1999**. En ese intermedio temporal, todas las marcas internacionales, unas con más acierto que otras, se prepararon para desembarcar en Rusia y los países de la CEI (exrepúblicas de la Unión Soviética), ya fuera directamente o con partners locales.

De ese modo, fueron emergiendo, en el **Top 100 del ranking de las cadenas de restaurantes en Europa**, grupos como Rosinter (en 2010 gestionaba 350 locales, de los que 150 en Moscú) o más recientemente, datos de 2021, Dodo Brands (facturación de 428 Millones de euros en 9 países, que le permitía ostentar el puesto 39) Novikop Group (228 Millones en 3 países y en el puesto 71) o Shokoladnitsa (161 Millones en 5 países en el lugar 87).

El aviso de Crimea

Pero, en 2014, la anexión por Rusia de Crimea ya dio un primer toque de atención sobre desestabilización política en Europa Oriental y algunas marcas empezaron a hacer las maletas. La contienda bélica con Ucrania precipitó la estampida y Rusia se quedó sin las principales marcas de restauración, que hacían las delicias de su ciudadanía.

McDonald´s tuvo que renunciar a un negocio de cerca de 1.200 Millones de euros, **Yum! y Amrest** dejaron sus locales de Pizza Hut y KFC, al igual que, por ejemplo, Costa Coffee, Krispy Creme o Burger King (no sin dificultades, por el berenjenal jurídico que se tejió para penalizar a quien se iba y que provoca que perdure sin apoyo alguno de RBI, desde 2022).

El zar de la restauración de marca en Rusia

Pero hay quien está sabiendo resistir en medio de tan honda crisis; no sin perder algunos negocios. Se trata de la aludida Rosinter, creada por Rostislav Ordovsky Tanaevsky Blanco, un emprendedor nacido en Caracas, en 1958, de madre asturiana y padre eslavo que, estudiando ingeniería en su ciudad natal, visitó EEUU en 1984 y vio que podía ser businessman en su país y otros.

Por ejemplo en la URSS, con marcas como **Kodak o con los Tropiburger** llaneros, ante la oportunidad de ser hostelero -vistas las carencias existentes en territorio soviético, en materia de conceptos de restauración moderna-, iniciándose en el hall del Hotel Moscú, con un tapas bar: El Rincón Español, en 1990.

Dicho año fue el del desembarco general de la restauración organizada, previo al derrumbe de la URRS y aparición de la CEI, que le permitió, a Rosinter, pensar en crear y abrir otros conceptos como Rostik, un QSR de pollo frito, que acabaría en manos de KFC u otras marcas que mantiene en su actual portfolio. Una vez que ha tenido que prescindir de sus alianzas internacionales con, por ejemplo, McDonald´s (para el segmento travel) o **Costa Coffee** y que se habían consolidado en el emergente mercado reseñado.

Fuente: Stars Coffee

El grupo Rosinter, de Rostislav Ordovsky, que cotiza en la Bolsa de Moscú (en 2014, con un 51% fue participado por Restorannaya Ob'yedinennaya Set' y Noveyshiye Tekhnologii Evroamerikanskogo Razvitiya Restorants OOO), integra principalmente marcas como Il Patio (1983), American Bar&Grill (1994), American Grill&Bar (1994), TGI Friday´s (1997), Planet Sushi (1999), Shikary (2000) o **Mama Russia (2009).**

Con estas, ahora está creeciendo de modo que se acerca a las cifras del 2019, con una tarjeta de presentación que consta de 229 locales (121 propios y 98 franquiciados) en ocho países (no solo de la CEI, sino también en Hungría, Polonia o Chequia) y que, según la sesión informativa ofrecida a los medios, el pasado 29 de agosto, augura un cierre del 2023, plenamente expansivo.

Considerando las veleidades del tipo de cambio del rublo, Rosinter cerró el 2022 con una facturación del orden de 73 Millones de euros, un coste de las ventas de 56,3 Millones, un beneficio bruto de 19 Millones y un ebitda de 9 millones (muy lejos de la época dorada).

Como aquella en la que Rostislav Ordovsky, declaraba a Nation´s Restaurants News, en 2014, dirigir un conglomerado de reconocidas marcas (locales e internacionales) que sumaban 383 locales, en 42 ciudades en ocho países cuando, entre la profesión, de forma respetuosa, se le consideraba “el zar de los QRS”.

En dicho meeting veraniego, **Rostislav Ordovsky** agradeció a su equipo, representado por su directora Margarita Koosteva, la brillante gestión llevada a cabo y que, dicha ejecutiva resumía en destacar como en el primer semestre de 2023, “se ha observado una recuperación de la demanda de los consumidores. Tendencia que, junto con las medidas de control de costes, la renovación de los menús y las actividades de marketing, nos ha permitido mantener nuestros resultados financieros”.

E ir a más puesto que, en plena contienda, Rosinter y sus filiales están abriendo nuevos locales en hubs del segmento travel, como el **aeropuerto de Domodedovo o en el turístico recinto VDNKh**, centro de exposiciones de Moscú, capital de Rusia, logrando que la banca que apoya las pymes, en Rusia, le otorgue financiación, de modo que potenciales franquiciados solo precisan disponer de un 20% de la inversión, en materia de recursos propios para adherirse al grupo. Incluso hay países como Tayikistan, donde marcas de Rosinter, empiezan a brillar con luz propia.

Rusia: destino de raperos y petroleros

La conmoción bélica no ha hecho olvidar a los políticos, en Rusia, lo mucho y bueno que habían aportado las marcas internacionales de restauración a la ciudadanía. De ahí que se apresuraron a buscar alternativas que llegaron inmediatamente, tras la salida de aquellas.

Así, la red de 850 locales de McDonald´ s fue adquirida por **Tasty That´s It**, de Alexander Govor (con negocio energético en Siberia y 25 establecimientos de dicha marca, como franquiciado) y re-etiquetada como Vkusno-i Toch (significa algo así como: Sabroso y Punto o Listo-para tomar) y el icono de los arcos dorados, sustituido por lo que se suponen son dos “frites” y un círculo, quizá un burger.

Todo ello en fondo verde y con un lema tal como "el nombre cambia, el amor permanece". Govor se ha comprometido a mantener el empleo de 62.000 personas en los próximos dos años, e ir abriendo progresivamente los 850 locales que operaban y más, quiere llegar a 1.000.

Otros casos, destacables serían los **50 locales de Pizza Hut vendidos a Noi-M** por 5 Millones de euros o los 70 de KFC que anecdóticamente han vuelto a tomar el nombre de Rostic´s (Rostislav Ordovsky había vendido locales y marca) por 100 Millones de euros, que ahora es explotada por uno de sus franquiciados: Smart Service, propiedad de K.Kotov y A. Oskolkov.

Fuente: Dominno Pizza

Singular noticia fue la mutación de los **130 Starbucks en Star Coffee** (logomarca muy similar), con activos valorados en 5 millones de euros, comprados por el restaurador A. Pinsky y el rapero T.

Yanusov autor de canciones con letra pro-Putin y propietario también de Black Star, cadena de burgers.

Los mismos que se han quedado con los 120 locales y 2.000 empleados de Domino´s Pizza, que ahora se llama Dominno (con una n cirílica).

En resumen

Podríamos continuar con el despropósito marquista relatado. Nos quedaremos con tres conclusiones: los ciudadanos de los países miembro de la CEI, Rusia incluida, no quieren renunciar a productos y servicios ofrecidos antaño por las desaparecidas marcas internacionales de restauración y hay que pensar que el expertise adquirido por sus empleados, permitirá mantener un mínimo de destreza en el oficio… hasta su ansiado regreso.

Eso sí, a cargo de directivos, no especuladores; como el fundador de **Rosinter, Rostislav Ordovsk**y, el cual ha sido capaz, de niño, arrebatarle pegatinas a su padre, en el negocio que regentaba, para revenderlas a sus amigos o como empresario, llegar a crear y mantener el conglomerado de marcas reseñadas e incluso … llegar a ser, en 2007, consejero de Lacrem, en España el negocio heladero de Jesús Farga.

INTERVIEWS

Commitment to Sustainability

"Representing a hamburger concept with beef as the main ingredient, we realize that we are part of the problem and therefore, we want to be part of the solution," says Richard Bergfors, President of Max. "Ever since our father, Curt Bergfors, founded the company in 1968, care for the environment has been integrated in our daily operations. Starting in 2007, sustainability and world climate became strategic issues that require a serious long term commitment. Our vision is to be a sustainable company in a sustainable society," says Bergfors.
The journey began in an executive meeting in 2007. The Max team watched the movie An Inconvenient Truth, the documentary film directed by Davis Guggenheim about former United States Vice President Al Gore's campaign to educate citizens about global warming. Since the film's release in 2006, An Inconvenient Truth has been credited for raising international public awareness of climate change and re-energizing the environmental movement. "The film was a wakeup call," recalls Pär

Max Facts

Turnover in 2010 €139 m
Net profit 11-14%
Number of restaurants in 2010 79 in Sweden and 1 in Norway (2011)
No. of employees approx. 3,000
Founded by Curt Bergfors in 1968
Run by Richard Bergfors (President) and Christoffer Bergfors (Vice President), both sons of Curt Bergfors
Owner Bergfors family
www.max.se

With 79 outlets from north to south, Max Hamburger Restaurants is the second largest hamburger chain in Sweden. In 2011, Max initiated international expansion when entering the neighbour country, Norway. The entire menu is carbon dioxide labelled; clearly communicating to customers the environmental effect of each menu item, and the company compensates its total carbon footprint by planting 89,000 trees in Africa each year. Sofia Selberg of Conceptuelle finds out how Max took a position as a sustainability forerunner in the global fast food industry.

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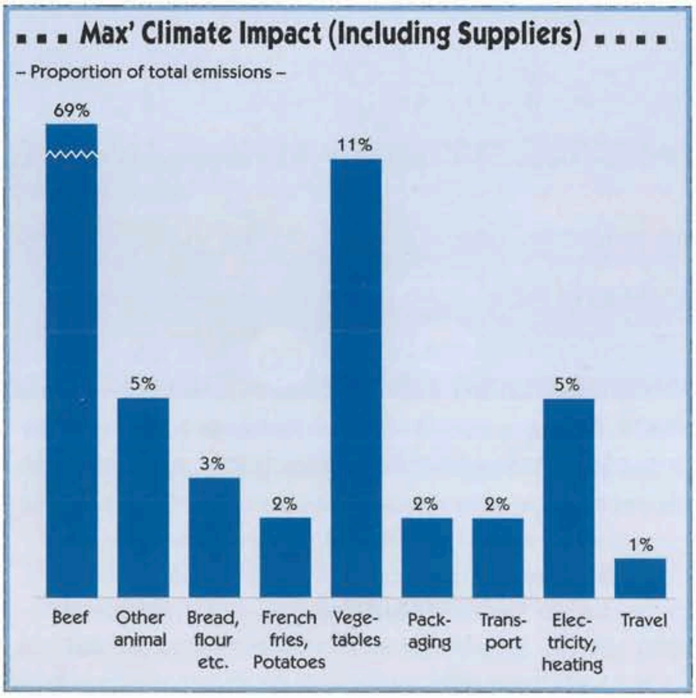
"We collected climate data from all of our suppliers and made calculations of the climate impacts in terms of carbon dioxide emissions during the production of our products," explains Chief Sustainability Officer Pär Larshans.

"Starting in 2007, sustainability and world climate became strategic issues that require a serious long term commitment. Our vision is to be a sustainable company in a sustainable society," says Richard Bergfors, President of Max.

Larshans, then Director of Human Resources and today, Chief Sustainability Officer of Max. Questions arouse: What are we doing? What is our responsibility? How can we make a difference? "I was asked to investigate what other restaurant companies were doing in this field," says Pär Larshans. "I soon realized that there were not many inspiring examples. We could definitely make a difference and we could lead this change," says Larshans.



Max partnered with The Natural Step (www.thenaturalstep.org) to look deeper into how they could shift towards sustainability. The Natural Step is a non-profit organization. It was founded in Sweden 1989 and has offices in 11 countries. They have developed a model that helps communities and businesses better understand and integrate environmental, social, and economic considerations.

Carbon labelling of the entire menu

"With the help of The Natural Step we began to conduct an inventory of our products. We collected climate data from all of our suppliers and made calculations of the climate impacts in terms of carbon dioxide emissions during the production of our hamburgers and other products. The entire process from farmer to guest was included in the calculations, i.e. the energy consumed, transportation, packaging and raw materials used," explains Pär Larshans. The information was then presented on the menus and on Max' website so that guests could consider carbon emissions in their menu selection. The figures are calculated in kilograms of carbon dioxide equivalent emitted per product ($kgCO_{2e}$). Menu items that are relatively low in climate impact (fish, chicken, vegetarian products and meals) are marked with a 'low CO_{2e}'-symbol. Beef has the largest effect on carbon emissions and is responsible for the greatest proportion of Max's total emissions (approximately 70%). Max use 100% Swedish beef and chicken which is a positive thing since local suppliers mean a shorter length of transportation and less emission.

Local suppliers mean a shorter length of transportation and less emission.

Offsetting carbon effects by tree-planting

The next step was to start offsetting the total carbon effects of bringing produce to market. "We have chosen to plant trees

Max Burger Suecia

in Africa through Plan Vivo-certified projects," says Pär Larshans. Trees absorb and bind carbon from the atmosphere equivalent to the emissions. The Plan Vivo System is a framework for developing and managing community-based land-use projects with long-term carbon, livelihood and ecosystem benefits (www.planvivo.org). Max finances the planting of approximately 89,000 trees in one year, which is equivalent to an area the size of 890 football pitches. Max' work with reforestation projects has been highlighted in the BBC documentary 'Taking the Credit'. In 2010, Max became the largest Plan Vivo tree planter in the world.

them after use. Max decided to remove the box entirely. No complaints have been received and sales of kids' meals are up.

Energy usage: Max initiated an energy project that will reduce the company's annual energy usage by at least 5%. All kitchens have been equipped with energy-saving equipment and all toilets are low flush. Max's lighting policy constantly measures energy consumption. PVC-free cables are used and they have switched from neon to low-energy LED lighting.

Eco certified fish: Max' fish burgers are made with certified Alaska Pollock, which are

Max' 3 Steps towards Sustainability

1. Calculate & label:	Every year, Max calculates the carbon impacts of all menu items. The products are clearly labelled on the menus to allow guests to make a conscious choice.
2. Reduce:	Max strives to reduce climate impacts by a number of efforts such as using electricity generated by wind power only, sorting waste and recycling material, down-sizing the use of disposables etc.
3. Offset:	Max offsets its total carbon emissions (including their suppliers') by planting trees in Africa. Approximately 89,000 trees are planted each year, which is equivalent to an area the size of 890 football pitches.

Other activities for reducing climate effects

The cornerstone of Max environmental work is the carbon labeling and the offsetting of emissions. But the fast food chain is making many other efforts in order to reduce climate impacts. Some examples;

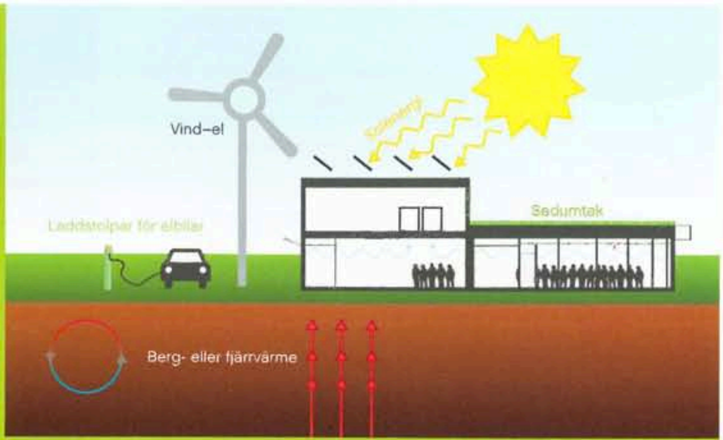
Wind power: All electricity-usage in restaurants come from wind power. This effort reduces Max' annual carbon emissions by 640 t. Furthermore, the switch to wind power ensures that 56 kg less nuclear waste is generated each year.

Dematerialization: Max is down-sizing the amount of paper and disposables. One example is the boxes for kids' meals. Instead of sourcing the boxes and recycling

sourced from stocks that use sustainable fishing. A fish burger meal is a climate friendly option that generates relatively low carbon dioxide emissions, equivalent to 0.4 kg.

Waste sorting and recycling: All restaurants are equipped with waste sorting facilities. Fryer fat is turned into biodiesel with a market value.

Green Building Standard: All new Max stand-alone units are built according to Max' new Green Building Standard. The Green outlets meet the Swedish government's requirements for environmentally rated buildings. The construction is made of concrete, glass and aluminum. The roof is partially covered with sedum and some of the roofs are equipped with solar cells. The



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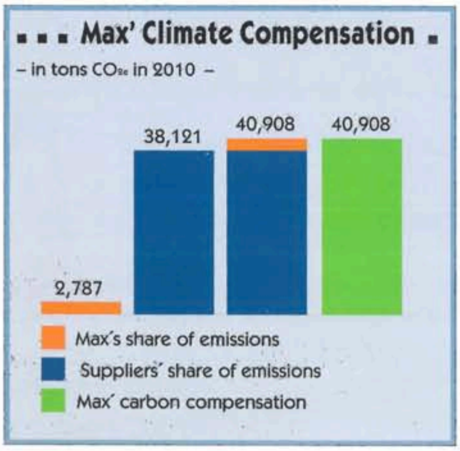
From farm to guest, the food served in Max produces approximately 40,908 t of CO_{2e} (kg of carbon dioxide equivalent emitted per product). 6.7% of these emissions come from Max' own processes and 93.3% from their suppliers'. By planting trees in Africa, Max offsets the total carbon footprint of both Max and their suppliers.



ventilation automatically adjusts to the number of guests in the building. Minimum energy consumption is the goal and outside the restaurant is a power pole for recharging electric vehicles.

Staff and management training: All employees undergo environmental training. The subject is regularly communicated in internal conferences, meetings, monthly letters and staff magazines.

New menu items: Max introduces more climate smart, non-beef alternatives such as falafel, chicken, fish and salads. During 2010, the number of climate friendly products served increased by 119,292, compared to the previous year.

Motives for doing good

"Our primary motive for engaging in sustainability is ideological – we want to contribute to a better world," says Richard Bergfors. "We want to demonstrate that no one can do everything, but that everyone can do something," Bergfors continues. "Taking a lead position in sustainability is also an important part of our vision to become the best fast food chain in the world," says Pär Larshans.

In addition to the ideological gains, Max' efforts has clearly led to a lot of media attention, awards and publicity, both national and international. Increased customer loyalty, employee pride and a stronger brand are some of the positive effects related to their efforts. From a financial perspective, the costs for engaging in sustainability related activities have been quite high, reveals Pär Larshans. "But the operating costs for energy and waste have decreased. We also consider the total, long-term picture, that includes all the positive effects on our brand, customer loyalty and eventually sales," adds Richard Bergfors.

More efforts to come

Max will continue with conducting yearly carbon analyses, labeling, tree planting and other activities to strive for sustainability. The most important challenge is to find ways to reduce the climate effects of beef. "We do not control the meat production industry but we will work hard to influence the farmers and the producers as much as we can," says Larshans.

Another focus area will be packaging materials, i.e. striving for maximum recycling and researching the 'packaging of the future'. A third focus will be to continue to refine and implement the Max Green Building format in most of the approximately 40 new Max units that will be opened within the next 4-5 years. "There are so many things to do and it will not be easy. We have to invent the future. But we are convinced that we can make a difference", concludes Chief Sustainability Officer Pär Larshans. ■

Max Burger Suecia

MAX BURGERS CELEBRATES 50 YEARS

Launching the World's First Climate-Positive Burgers

This year is the 50th anniversary for Max Burgers, the Swedish family owned burger chain. Today, the Max chain consists of 132 restaurants operating in five countries and employing 5,400 people. Poland is the country most recently entered and rapid expansion is expected. During an anniversary event in Gällivare, CEO Richard Bergfors talks to Sofia Selberg of Conceptuelle about sustainability, green burgers and growth ambitions across borders.

Happy 50th birthday! How have you been celebrating?

We threw a birthday party that lasted four days in June. Guests in our restaurants enjoyed birthday offerings and special prices. The response was overwhelming; we had over 1,000,000 guests in our restaurants during the four days. In Gällivare, where our parents opened the very first Max 50 years ago, we wanted to celebrate even more. As a tribute to our roots and the people who live there we built a Max pop-up restaurant at the same spot where the first unit once was located.

In connection with your 50th anniversary you are launching "the world's first climate-positive burgers". What is the background to this launch?

Sustainability has always been at the core of our business, but instead of merely compensating, we are now overcompensating. Our mission is to make the world a little better, both by serving the best tasting burgers and by doing good in society and for the world. We believe being the first to offer climate positive burgers is a good step forward. The reasoning behind the launch of climate-positive burgers is simple: climate change on our planet is out of control, and we need to stabilise it. In order to meet the two-degree climate goal set out in the Paris Agreement, the world needs to work harder at cutting emissions and start the work of clearing greenhouse gases that have already been emitted into the atmosphere. Just going carbon-neutral is not enough anymore. We know that we are part of the problem, being in the burger business,. And together with our guests we want to be part of the solution. With the climate-positive burgers, we remove some of the carbon dioxide that

Max Burger Suecia

MAX BURGERS CELEBRATES 50 YEARS


Richard Bergfors & Christoffer Bergfors

has already been emitted into the atmosphere. We do this by planting trees, which absorb more carbon from the atmosphere than our products' total emissions. The net results are positive.

So what exactly does Max do to become climate positive?

For our burgers to be climate positive, we take action in three areas:

1. We measure 100% of our product emissions.

We include all greenhouse gas emissions in our calculations. In Max's case, this means measuring emissions from the farmers' land to our guests' hand. We include our co-workers' and guests' travel to and from our restaurants as well as their waste and lots more.

2. We reduce our emissions.

Over the years, Max has implemented hundreds of measures to reduce our emission of greenhouse gases. We add new approaches and solutions all the time, and will continue to do so in the future.

3. We capture at least 110% of emissions

We plant trees that absorb and store carbon dioxide from the atmosphere as they grow. Not only do we carbon offset all the emissions from all our food, we go further to capture the carbon dioxide equivalent of another 10% of our emissions. This means we are helping reduce the overall levels of greenhouse gases in the atmosphere.

As part of your many efforts to reduce emissions, you encourage guests to eat more green burgers, is that right?

Of course, the best way for a business to make climate positive products is to reduce the amount of emissions it creates in the first place. For us, that means making a wide and tasty range of green burgers. Vegan and lacto-ovo vegetarian burgers have a much smaller carbon footprint than a beef burger and it helps reducing our emissions significantly. We will keep making sure our green burgers taste at least as good as our beef burgers. In 2016 we quintupled our range of vegetarian and vegan options – we call the category The Green Family. It was the biggest and most profitable product launch ever in Max 50 year history. The green meals have attracted new customers to Max and persuaded many meat-lovers to switch from beef.

The sales of Green Family meals have increased by 900% over the last two years. As a result, our total climate impact has been reduced by 13% per earned dollar over the last two years. Our goal is for every second meal sold in our restaurants to consist of something other than beef by 2022. If that goal is reached, it will likely have led to a 30% reduction in emissions in just seven years. Following this development we have even changed our company name from Max Hamburgers to Max Burgers. Our new name is more consistent with our vision that a burger can be anything, whether it is meat or other ingredients. It could be fish, chicken, vegetarian or vegan.

Max Key Facts

Main foodservice sector QSR, burgers

Country of origin Sweden

Founded in 1968

Number of units 132 units

Turnover 2017 SEK 3.2 bn (€309 m)

Country presence Sweden (119), Norway (5), Denmark (3), Poland (2), Egypt (3)

Employees approx. 5,400

Ownership Bergfors Family (100%)

Franchise approx. 90 % company operations, 10% franchise

President Richard Bergfors

Vice president Christoffer Bergfors

Chairman of the board Curt Bergfors

Menu items Hamburgers, green burgers, fish and chicken burgers, salads, side orders, desserts, dip sauces, shakes, special health menu line named Delifresh

Website www.maxburgers.com

Max Burger Suecia

Max Burgers celebrates 50 years

How do you inspire other companies to do the same thing?
We hope that we can inspire other companies to launch climate-positive products and services. We want to set a global benchmark for climate action. We are convinced that our guests and other consumers prefer companies that take responsibility for the environment and the future.

It seems that sustainability has been at the core of your business for 50 years. What advice would you give to other foodservice companies that are only at the beginning?
My best advice is to get started right away and to avoid making things too complicated. Four things to keep in mind:
1. Sustainability, both environmental and social, is here to stay. It is not a trend; it is a mindset that you need to embrace and integrate into your business.
2. Do not try to do everything at the same time. Begin small scale. Select a few areas and set clear goals.
3. Be transparent, honest and trustworthy. You do not have to have all the solutions right away.
4. Seek inspiration from others. There is nothing wrong with benchmarks and to do what others already do. There is no need to come up with unique actions. Do not reinvent the wheel.

Moving from sustainability to growth, what are your ambitions in Sweden and internationally?

Our vision is to be the best burger chain in the world. We currently have 119 restaurants in Sweden and 13 abroad. By 2028, our goal is to have more Max restaurants abroad than there are in Sweden. Our goal is to increase the number of restaurants in our home market by over 40%, which means another 50 Max units in Sweden within the next 5-6 years. Looking at Scandinavia as a whole (Sweden, Norway and Denmark) we plan to expand with a total of 120 units within the next 10 years.
We entered the Polish market in 2017 and we currently have two units - one in Wroclaw and one in Gdansk – and a third unit to be opened in Warsaw later in 2018. We believe strongly in our potential in Poland and our goal is to establish 200 Max units here within 10 years.

The Max Story

Max is Sweden's oldest burger concept. The 19-year old Curt Bergfors and his partner Britta Fredriksson opened the first Max unit in 1968 in the small mining town of Gällivare. The 17 sq m place soon became very popular and the couple decided to slowly expand their business with more units, first in the northern parts of Sweden, then to Stockholm. In 1980 they opened a Drive Thru and this was actually the first drive thru restaurant in Europe. McDonalds was outcompeted by Max in two cities in the north of Sweden and closed down the two units. Max took over both premises and this news was even reported about by CNN. The expansion began to accelerate in 2001 and the two oldest sons of Bergfors were appointed President (Richard Bergfors) and Vice President (Christoffer Bergfors). Soon there were Max restaurants in all parts of Sweden and in competition with McDonald's and Burger King, Max was voted "best taste" and "most popular" burger chain every year. The brand's international journey started in 2011 as Max expanded to Oslo, Norway, followed by Denmark in 2012. Today, there are a total of 132 restaurants in Sweden, Norway, Denmark, Poland and Egypt. The family Bergfors owns and leads Max; The father and founder, Curt Bergfors, is Working Chairman of the Board, his son Richard Bergfors is the President and the other son Christoffer Bergfors is the Vice President. The mother and co-founder Britta is also active in the company.

Max Burger Suecia

MAX BURGERS CELEBRATES 50 YEARS

What have been your key learnings going international with Max? Any advice you can share?

First of all, going international has also been a positive process for our performance in the home market. It has encouraged us to define our concept and processes in even greater detail and this has improved our overall business. My top three pieces of advice for crossing borders and establishing a brand in new markets are:

1) It takes time. As a rule, going international will take more time, effort and resources than you think. I would say, double or triple your initial time plan.

2) Do your homework. The first phase is "pre-decision to entry": research and evaluate the foreign market, i.e characteristics, competition, consumer behaviour, trends, potential etc. The second phase is "post decision to entry": select partner, find suppliers, make concept adaptations, recruit, train, prepare for start-up etc. Take your time, do your homework thoroughly and do not rush into action. In our case, we spent years on it.

3) Find the right partner. It may seem obvious, but it is so important to select the right partner, someone who has the local market know-how and connections. Moreover, be clear about your targets and expectations for the brand in the new market and make sure that your partner shares your view.

Another key learning and insight is that you should not underestimate the fact that your brand awareness is at level 0 in the new market. You need to build a trusted brand from scratch, not only towards consumers but also in terms of recruiting staff members, site searching, supplier sourcing etc.

Max is a success story. Customers are satisfied, sales figures are boosting and profitability is one of the highest in the industry. What is the secret behind your success, in your view?

Many factors make up the winning formula. I believe that the most important one is that we have always put taste first. We aim for quality in everything we do. We never compromise on taste or quality. The best ingredients, carefully chosen and prepared with passion – that is the recipe for the best burger. The fact that we are a family owned business is also a positive thing. It means we are stable, 100% committed and that we have a long-term perspective for many generations to come. ■

Personal Perspectives – Richard Bergfors:

Richard Bergfors is the oldest of four siblings. Having spent most of his childhood, teenage and adult years in the family business, he took on the role as President of Max in 2002. Born in October 1975, he is today 43 years old.

What was it like to grow up in a family business?

Max has always been a part of my daily life. I literally grew up with hotel corridors and restaurant kitchens as my playgrounds. Back then, the Max Group owned and operated a much wider variety of service businesses: hotels, fast food restaurants, full service restaurants, petrol stations, grocery stores and tanning salons. It was an exciting and fun environment to grow up in and a great start to my future career. At the age of 12, I started working and helping out in the family business during weekends and summer breaks.

Your brother Christoffer, your father Curt, your mother Britta and you are all active in the company. How do your roles differ?

Our father, Curt, is the founder and majority owner of Max. He is an entrepreneur to his finger tips. He is still very much active in the company, taking great interest in product development, trend spotting, quality control etc. He lives part time in Sweden and part time in Florida, USA, and we have frequent contact. My brother Christoffer is one year younger than myself. Since 2002, Christoffer is the Vice President of Max, focusing on the Swedish operations and I am the President, focusing on the international development. Our mother Britta is also active in the company and working closely especially with Christoffer. In our family we do not need to separate working time from leisure time – for us it is always Max time.

What type of leadership do you practise?

I would like to believe that I am a "management by walking around" type of leader. I take pride and joy in being part of the action in the daily operations. I would never be happy sitting in an office spending all my time by the computer, although this is also a part of my job. I live the Max life 24 hours and I have a genuine passion for the foodservice industry. To me, work is so much fun and I believe this feeling is extremely important for the company culture.

The way you see it, what are your personal strengths?

Long practical experience is definitely one of my strengths. I have done it all and that gives me a solid platform as well as recognition from my colleagues and staff. I believe theoretical studies are important too and that is why I got a university degree in Business Administration as well as an MBA from the Stockholm School of Economics. Another strength is simply the fact that I am so passionate about food and restaurants. I really love working in this industry and I think this attitude means a lot to the company culture.

What are your dreams for Max in the future?

I hope we will fulfil our vision of becoming the best burger chain in the world. When are we the best? When others say we are! Becoming the biggest is not as interesting to us. We want to take the premium brand position. I hope the international part of Max develops according to our plans. Not only because we want to grow but also because it is inspiring to get to know new markets.

What are your personal, professional plans for the future?

I have been the President of Max for 15 years and I plan to continue as long as I find it exciting and as long as I can make a good contribution to the continued success. Being responsible for such a dynamic and expanding company as Max, requires a lot of energy and time but I have a lot more to give. I enjoy the expansion process because it gives me the opportunity to learn more about new places: each new city we open up is interesting to me.

Max Burger Suecia

The Swedish fast food chain **Max Premium Burgers** operates more than 147 restaurants in Scandinavia, Poland and Egypt with about 5,500 employees. The Green family is available in all countries, but there are some local adaptions in the range and number of products. The company's annual turnover is around €300 m. Max Premium Burgers is considered one of the most profitable restaurant chains in Sweden, more successful than McDonald's and Burger King. The company was founded in 1968 by Curt Bergfors and Britta Fredriksson in Gällivare, in the north of Sweden, and is still family-owned. Curt Bergfors is working chairman, Richard Bergfors is CEO and Christoffer Bergfors is deputy CEO. 9% of the company is owned by the foundation "Rättvis fördelning" (The Fair Distribution Foundation) to ensure that 7-10% of the annual net profit of the company goes to projects around the world to people in need.

Max's sales of vegetarian and vegan burgers have seen an increase of 900% over the past two years. Their share of the total sales volume has risen from 2% to 18%. Why do you think are these products so popular with your customers?

In fact, we have been able to increase sales by 1,000% over the past three years. Our number one rule is: it's all about taste. Burgers are our passion! We invest a lot of time in every single one in order to guarantee a convincing taste experience. This is also true for our 'Green Burger' range. It's our goal to offer carnivores an incentive to taste a burger that belongs to the 'Green Family' – only to realize that it tastes so good that they want to eat it again. We want to be part of this change by inspiring and supporting our guests in consuming more plant-based foods. We therefore hope that we will continue to witness great change in purchase behaviour towards 'greener' options in our guests.

Max's goal is for 50% of sold meals in 2022 to be comprised of something other than red meat – which would equal a reduction of greenhouse gases by 30%. How will this affect your overall menu offer?

We will continue to focus on expanding our 'Green Family' range, because we want to make it easy for our guests to opt for something other than a beef burger. We launch five burger campaigns per year and we always make sure that every burger is not only available with chicken or beef, but also with a 'green' alternative. Oftentimes, the veggie burger even heads the campaign in order to motivate guests to choose something other than the beef burger.

Could you tell us a bit more about the plant-based burger, which was developed under your leadership and launched in May 2019?

The Delifresh Plant Beef offers both die-hard carnivores, and guests who prefer a plant-based diet, a great-tasting and satisfying protein alternative to meat but with a much lower carbon footprint. Work towards the goal of being able to offer our guests a plant-based meat substitute began in earnest when we launched the first part of the 'Green Family' in January of 2016. We started the search for an option that would fit Max's menu, but quickly realized that none of the products we found could meet our tough requirements for really good taste. So we decided to develop our own plant-based burger for meat lovers. For me the proof of our success was when my meat-loving son couldn't tell a difference.

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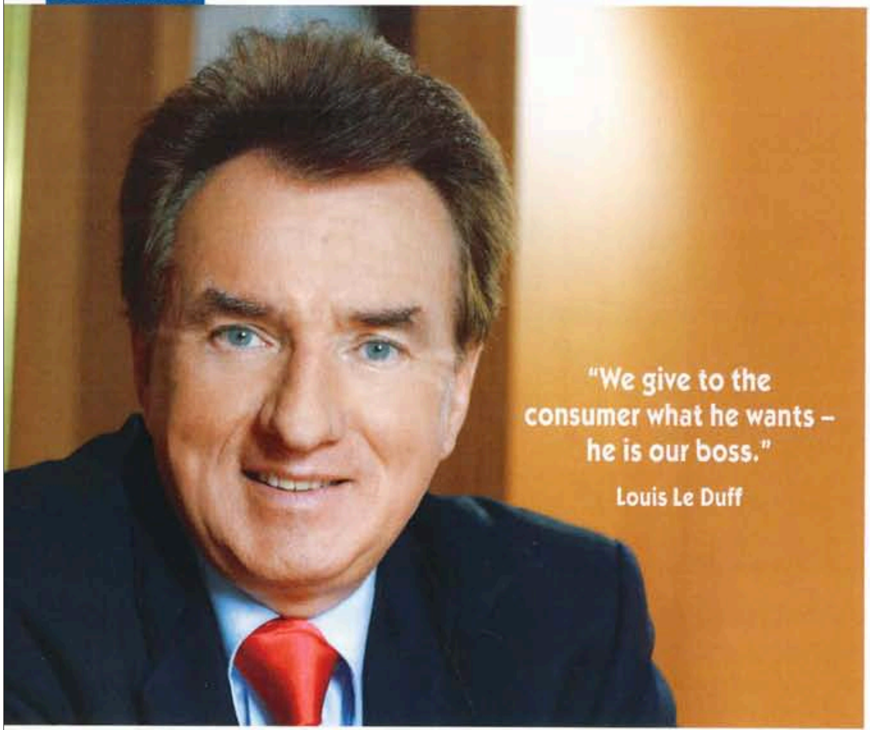
Jonas Mårtensson, Head Chef at Max Premium Burgers

INTERVIEW



Dough Doyen

Louis Le Duff, founder and owner of France's Groupe Le Duff, has grown his global foodservice and bakery empire – annual sales nearly €1.2 bn – with the help of two key strategies: he maintains an intense, expert focus on the traditions and technology of dough. And he applies vertical integration 'from fork to fork' (pitchfork to table fork) with his café and restaurant chains operating in tandem with bread and pastry manufacturing. Ever-wider international distribution is aided by franchising, the subject of a best-selling book by Mr. Le Duff. Interview by Bruce Whitehall.

With leading foodservice brands in Europe and America, plus factories making bakery products and sous-vide meals, is Groupe Le Duff a relatively complex enterprise?

Louis Le Duff: No. We are very focused. It's important not to confuse dispersal with diversification. While we have dispersed our activities throughout the world, we have not done that with a lot of different product genres. We have always been focused almost entirely on butter and flour, the key ingredients in dough, and have developed an organisation focused on those ingredients. Thanks to scale, we are able to achieve good quality at low price. And we get stronger every year. It's very much about vertical integration. We see ourselves as engineers in flour and in butter with our activities extending 'from fork to fork' (pitchfork to table fork). We own a farm and we stay very close to the harvesting process, both there and at other farms which supply us. We do not have a mill but we work very closely with the flour-makers, and we are major purchasers of Controlled Appellation of Origin (AOC in French) Charentes-Poitou butter. We buy it a year in advance so we can guarantee the prices we are going to pay, and we also have long-term contracts for the flour. That means that we control the quality and, more important still, we know the traceability from the farm to the consumer. That is something we are very strong on.

Do you ever look at opportunities in other foodservice sectors?

Le Duff: People see how we have succeeded in bakery-cafés and are constantly suggesting new markets we could try. We have to say 'no'. Sushi is a great dish but I would not open a chain of sushi outlets. That would not help me be the best in the bakery-café business. The same goes for restaurants serving steak, or fish, or hamburgers. They would take us away from what we do best. The elements of the product, their appeal and logistics are quite different. We have to stay focused.

Alongside your foodservice chains, you have major interests in bread and pastry manufacture. How did that evolve?

Le Duff: Early on in the development of the Brioche Dorée cafés, we learned the benefit of central manufacturing and distribution of hand-crafted, par-baked frozen dough products. That was crucial to our success. Freezers and bake-off at the retail outlets conferred operational simplicity and safety and ensured consistent quality and standards for customers. By the mid-1980s, the spread of Brioche Dorée outlets led to the need for our own Bridor production unit in Rennes, Brittany. Within ten years the factory extended its product range and services to include 4 to 5 star and luxury hotels.

Today there are four Bridor factories around the world, making a wide range of breads and pastries which include individual rolls, sandwich rolls, brioche and baguettes, all made using traditional methods where the dough is kneaded

▪ ▪ ▪ Groupe Le Duff ▪ ▪

Established 1976
Headquarters Paris
Total group sales €1.175 bn
No. of employees 14,100
Main foodservice brands Brioche Dorée; Bruegger's; La Madeleine; Del Arte
No. of restaurants/café-bakeries 1,120
Manufacturing companies: Bridor (€280 m sales in 2011) with 4 factories and a sales presence in more than 50 countries on 4 continents; Ferme des Loges
www.bridordefrance.com
www.groupeleduff.fr

slowly and left to rise, plus a big selection of all-butter pastries. Bridor's 'Tradition' range Eclat du Terroir includes frozen breads and fine pastries developed in collaboration with chefs from Lenôtre in Paris. In meeting local market variations, the Bridor range now extends to around 250 products and accounts for about 27% of our total global business.

What's the story with non-bakery manufacturing?

Le Duff: Separate from Bridor, we have La Ferme des Loges, founded in 2009 to make chef-prepared ready-to-heat starters, main courses and desserts. It's an independent, innovation-driven branch of the business with its own separate factory and it mainly supplies 4 to 5 star hotels and restaurants as well as our own Del Arte and Brioche Dorée stores. Recipes have been developed with the help of top French chefs with many dishes based on organic produce.

It breaks somewhat from our focus on dough but the products are complementary to bread and provide a very good alternative to dough-based products like pizza in an environment such as the Del Arte chain.

People are more and more educated. They know what is good for them and what is not.

What changes in consumer demand do you foresee over the next few decades?

Le Duff: Most of the products we shall be eating in the future do not yet exist. Around 50% of products in the home freezer were developed in the last ten years. That's why we bring together a lot of different people in our R & D labs – highly qualified bakery and catering professionals, chefs, award winning Meilleurs Ouvriers de France (Best Craftsmen of France) and teams of nutrition experts – to keep on researching raw materials and new recipes.

We know already that health will be of greater concern to everybody because people are more and more educated. They know what is good for them and what is not, and they are aware of calorie levels and many other things. One area is reduction of sugar, salt and fat. Also, higher fibre

Did your grandmother eat sushi?

content in breads and pasta products is becoming much more important in helping to fill the stomach. We recently brought out our Bridor Delifibre white baguette, which contains 100% natural soluble fibre from wheat grain. It prolongs the feeling of satiety and helps discourage snacking.

A second point is that everything will continue to become more international. Just look at recent generational changes. Did your grandmother eat sushi? Lots of French people, especially younger ones, now eat it while a lot of European people eat croissants and baguettes; so do the Japanese.

How adaptable are your concepts and products?

Le Duff: Our speciality is the French café-bakery with French pastries and breads and our experience shows it can work everywhere in the world. But it still needs to be adapted to each country. Such demands can be quite subtle. In Saudi Arabia, for example, we found it necessary to make a croissant with thyme and olive oil, called Zaatar croissant. In Japan, we have to incorporate kidney beans instead of chocolate. We give to the consumer what he wants – he is our boss.

How has the European economic turmoil affected you?

Le Duff: It's better to develop a business at a time when the economy is good. But both for Brioche Dorée and Del Arte that


Brioche Dorée

is not so important because our pricing is geared to the segment of €5-15 per meal, so we are protected by the price. Customers who find it a problem to buy a €25-35 meal reduce their spending to a €15 meal in Del Arte or spend €5-10 in Brioche Dorée. Or they go to a supermarket and buy take-home products. Our business structure gives us access to all those situations

International development

What's your strategy internationally?

Le Duff: We are spreading throughout the world both through our high street foodservice brands, led by Brioche Dorée and Del Arte Italian Ristorantes, and through our manufacturing business, led by Bridor, which exports to 54 countries. Expansion within Europe started in the mid-1980s. Brioche Dorée and Del Arte can now be found in ten countries in Europe, the latest ones being Romania, Germany, Denmark and Ireland. We are also present in six countries in the Middle East & North Africa (MENA).

The development of North and South America came around 2000; we now have 550 outlets in North America. In 2003, US turnover stood at $23 m; today we have $600 m with an American partner. In April, our first company-owned outlets will be opening in China which we see as a very promising opportunity. The Chinese have a strong food culture and are very curious about food cultures from other parts of the world, so we have seen a lot of interest in our products.

If you want to stay independent in business, you need a cash flow which is bigger than your expenses – and bigger than your ego.

Do you consider acquisitions of local chains?

Le Duff: That's been very important in North America, where we started much later than in Europe. As well as our Brioche Dorée stores in USA and Canada in shopping malls, high streets centres and airports, downtown etc. we made two important acquisitions. In 2005, we bought La Madeleine, a US chain of

French café-bakeries. They were not doing very well so we put in our people and concept and it is now a $150 m business. We improved results with our experience and our 'fait à la maison' (home-made) traditional products

We made a bigger acquisition last year with Bruegger's, a much more American concept focused on bagels, pies, tarts and wraps, plus coffee, sandwiches and salads. They have around 300 branches in 26 US states and Canada. There was relatively little on their menu at lunch so our strategy is to steadily increase the choice with European and French product. But we won't change the Bruegger's brand, which is very well established in North America.

What have been the main challenges in taking traditional French bakery worldwide?

Le Duff: Breaking into markets outside of Europe and North America has posed the biggest difficulties. That's when you really encounter local differences. That was the case in Buenos Aires. I like South America for vacations but, in terms of doing business, it's not the same as Europe. There are less differences between, say, a Frenchman and a Pole than there are between a European and a South American. If you succeed there, amidst all the political and economic crises, you can succeed anywhere. And we have done; from the ten shops we originally acquired, we now have fourty, and a Bridor factory.

What did you have to change?

Le Duff: The taste, the product mix and the look of the stores all needed attention, and of course effort was needed on employee motivation. But we have kept the basic focus. We started with a few units to test our concept with local people.

Location and climate both make a difference wherever you go. Our mix of units in France is 45% shopping centres, 40% high streets, and 15% airports, stations and office blocks but other countries can be very different. In somewhere like Dallas, where high temperatures make it more difficult to sell pastries, our typical units are in malls. Bakery restaurants typically need 200 sq m with 120 seats, or 100 sq m only for take-away.

Where in the world have you encountered greatest difficulties?

Le Duff: In hindsight, we went to South Africa – alone – too early. We did not know the country and established our factory in a very dangerous area. There were constant problems, with robbers coming into the factory – and even the shops – with guns, and we were forced to close. We arrived at a bad time, and maybe it's better now, but the main English and French management we employed to get the business started would not want to go back. Other parts of the world, like the Middle East or Asia, are relatively easier.

Brand development

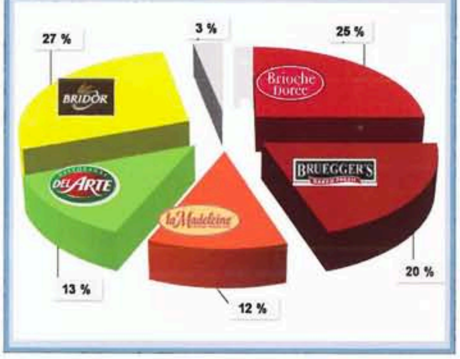
What determines the offer at your two main European foodservice chains?

Le Duff: Brioche Dorée stores are cosy places offering attractively displayed refreshments based on baked-off breads and pastries, mainly to traditional French recipes, at any time of day, from breakfast to afternoon snacks, including take-away.

In 1983, with Brioche Dorée growing rapidly in France and internationally, we started an Italian pizza/pasta system with table service. It did quite well and in 1996 we merged it with Del Arte, which we acquired from the Accor Group. That is now our Italian restaurant brand. With over 100 units, it is market leader in France in what is a fragmented market of mainly independent restaurants. We promote it as 'the Italy of your dreams'. The key to the concept is centralised supply of ingredients, many imported from Italy, and systematised back-of-house production. It is presented as a Tuscan-style villa with a large interior patio to convey the feeling of a village square. Units have 160-250 seats. We grew 25% last year and expect 30% this year.

Locations are typically on the edges of towns, in shopping malls and near to cinemas or recreation areas. Casual, through-the-day trade is possible but the emphasis is primarily on lunch and dinner, with three course menus promoted. Around three-quarters of units are franchised or joint venture. Some

Sales Mix by Brands



Of Groupe Le Duff's total sales volume, the industrial activity accounts for 30% (Bridor 27%, others 3%). Bruegger's – with around 300 branches in the USA and Canada – was a major acquisition in 2011.

Franchising Priorities

In growing Groupe Le Duff internationally, Louis Le Duff has been a strong advocate of franchising or joint venture and is the author of a book on the subject ('Reussir... en Toute Franchise'). His younger son Vincent, in charge of European expansion, explains the company's approach.

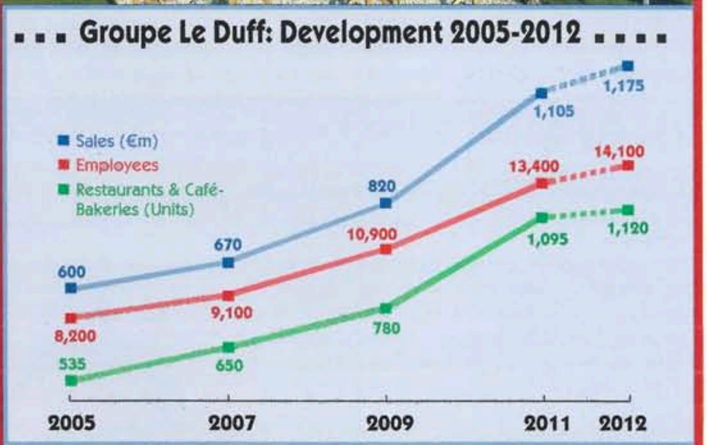
Vincent Le Duff: "We are able to be in every country in Europe and we are very flexible about the arrangements we employ to get into different markets, depending on the country and the competition. Our logistics allows us to be everywhere in Europe at a low cost. Bridor today distributes its products in 54 countries.

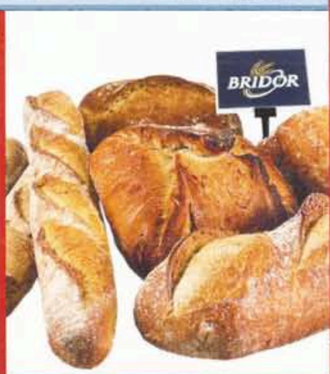
Most openings are through franchises but in larger markets we have a joint venture partnership, such as in Bavaria for example. In smaller markets like Czech Republic and Romania, we have franchises. The same goes for the Middle East. The territorial exclusivity is made according to the market; it can be for a city, a region or a country. It depends on the market and the partner.

We typically have two types of franchisee. Firstly, a group or company which will take the exclusivity of the country, i.e. a multi franchisee with a development plan. We look for a group with the skill to develop and manage a chain, not necessarily a food player but a company which can sustain the growth of the brand, both financially and from a human point of view, putting the best management in place and ensuring that everybody who works for the business can perform to the best of their ability. In smaller markets, we may also seek independent franchisees looking to open 1-3 shops."

INTERVIEW

With over 100 units, Del Arte is leader in the highly fragmented French pizzeria/Italian restaurant market. Groupe Le Duff is spreading throughout the world both through their highstreet foodservice brands, led by Brioche Dorée and Del Arte, and through their manufacturing business. While in former years the number of openings remained quite stable, totalling around 60 new outlets worldwide each year, more than 300 units were added in 2010/11 (Bruegger's!).





trade alongside Brioche Dorée units. Del Arte is also being developed internationally and we look for local partners.

What other foodservice brands do you operate?

Le Duff: We have developed Fournil de Pierre as a craft bakery concept. It is devoted to the art and enjoyment of good old-fashioned bread in 20 varieties plus pastries, pancakes, tarts and salads, using French and European recipes and selected farmhouse flour. There are 35 units between France and Québec. The emphasis is on fresh, artisanal bread rather than using centrally produced frozen dough – hence its slower rate of growth compared with Brioche Doree. We see Fournil de Pierre as 'the restaurant of the baker'.

What view do you take of healthy eating pressures?

Le Duff: Brioche Dorée has been focused on healthy food for many years but that does not mean neglecting flavour. The brand is committed to balanced eating with variety, quality and food safety in a healthy, tasty diet at affordable prices. We like to see it as pleasure and wellness on a plate – 'Le plaisir et la santé dans l'assiette'.

We control the quality and, more important, we know the traceability from the farm to the consumer.

But don't many of your more self-indulgent products contain a lot of butter and sugar?

Le Duff: When we started, people were relatively slim and croissants, brioche and other traditional items were not seen as a problem. Nowadays we have developed and continue to include some lower calorie options. We have had salad bars, fruits, yoghurts, etc, in our units for 20 years and they continue to be developed to be in tune with what today's consumers want. In some countries there is pressure to provide customers with nutritional guidelines and we comply with those requirements. The Brioche Dorée web-site has a calculator giving protein, calories, carbohydrates, etc, for all menu items. Some products can be high in calories but there are other considerations, such as fibre content. ■

Personal Perspectives

You started 35 years ago with €2,000 investment and are almost unique among postwar European restaurant entrepreneurs in consistently growing your business year-on-year. You now make nearly €1.2 bn per year from what is still 100% your own business. What's the secret?

Louis Le Duff: If you want to stay independent in business, you need a cash flow which is bigger than your expenses – and bigger than your ego. Our concept gives us a very good EBITDA (earnings before interest, taxes, depreciation and amortisation) of around 15% with a restaurant. With good payback you make money to develop your company. Good people are the key, both employees and good franchise partners. You need people who are able to learn from their mistakes. And you need to be adaptable. We have a good concept but we are French, not English or Polish. We need a local partner who really knows and understands the local market. That way, we learn how to adapt. We succeed together.

What keeps driving you onwards?

Le Duff: I like my job, I enjoy my work and I have good health. I have good top team managers and I also now have my two sons with me. In the meantime, my last book on how to succeed in your business ('Enfin Patron! – 3 Guides Pratiques') has been the best-selling business book in France in the past year.

How did you get into business?

Le Duff: My parents had a small market gardening business in Brittany and I started working there when I was 15. I quickly got my first taste for business, especially buying and selling produce. I went back to school and then to business college. Then I passed an MBA at the University of Sherbrooke, near Montreal. In 1974 I was awarded a doctorate (PhD) in business. From 1974 to 1980, I went to the University of Rennes, where I was an associate professor.

When did you get the inspiration for Brioche Dorée?

Le Duff: After I came back from America in 1974, it became clear to me there was a market in France for an all-day casual concept combining bakery and café serving hand-crafted French food in freshly baked bread and making maximum advantage of the fresh-bake aroma. The first Brioche Dorée opened in Brest in 1976. Several more followed over the next two years with chain development aided by franchising or tenant-management of stores. After opening several provincial branches, our first Paris store opened in 1980s and by 1982 we also had one little shop in a prime site in London.

What is your favourite food?

Le Duff: A good sandwich – and a good supper!

FoodService Europe & Middle East 2/12

“The pressure for change is tremendous”

Even in the contract catering industry, a business believed to be largely crisis-resistant, the Covid-19 pandemic has changed business conditions significantly. Thomas Guether, Chief Growth Officer Europe & Middle East at Compass Group, talks with Executive Editor Katrin Wissmann about the new formats, services and technologies that will define the world's biggest contract caterer's business division in the future.

Interview: Katrin Wissmann

© Compass Group

Thomas Guether, Chief Growth Officer EMEA

In the past two pandemic years, the entire food service industry faced unprecedented challenges. How did that affect contract caterers in general and corporate caterers in particular?
The impact was enormous. The basis of our business model in the business sector was suddenly gone when guests continued to stay away. Just to put figures on it, in mid-2020, we lost half of our entire business in the third quarter, in only three months. With sales declines of up to 90%, the B&I sector was particularly hard hit. The situation was dramatic.

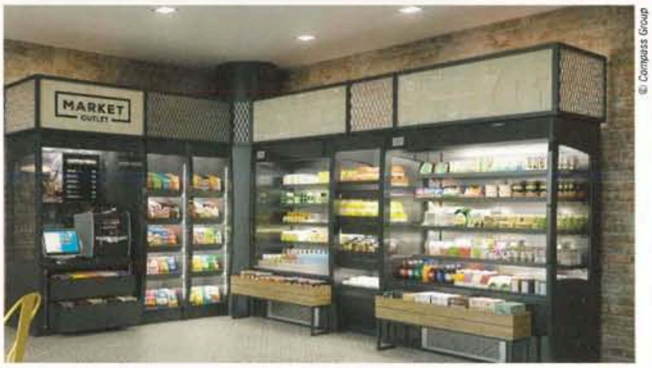
How did you deal with the situation?
Like all big and small caterers, we initially switched to survival mode. Relatively soon, however, we stopped focusing on all those questions of revenues, balance sheets, cost coverage and the likes to consider what the developments generally meant for our products, services and structures. The pressure for change in contract catering is tremendous. We've spent the past two years working intensely on finding new solutions.

Are these solutions linked to the study Compass Group conducted last year?
Yes, the goal of our "The Future of Work" study was to get to understand both clients and guests. We wanted to find out about what they think will happen with the "eating at work"

Focus on business catering

The Business & Industries sector (B&I) is Compass Group's biggest division in terms of sales, accounting for 45% of total sales. This interview focuses on the contract caterer's white collar business catering operations, where the Coronavirus crisis has changed conditions and requirements significantly. New solutions are needed.

INTERVIEW



After successfully establishing its contactless micro markets in North America, Compass Group is currently rolling out the concept across Europe. It offers employees both chilled and heat-to-eat food, high-quality coffee, snacks and chilled beverages. A self-checkout system is available 24 hours a day, seven days a week.

The shelves are refilled regularly to provide fresh food options throughout the day.

issue in the future. We conducted more than 25,000 interviews in 45 countries for the survey, more than 50 of our global clients took part. We pooled the results with data from other Global Insight Surveys. Then we used the overall findings to adjust and future proof our food offer.

You oversee the company's existing customer portfolio and distribution in Europe and the Middle East. What new formats or services were developed in the region to respond to the new challenges?

There are many different responses, it is a mix of new offers and digital solutions. Let's take Austria as an example, it is a small country that had a very hard lockdown. Some 2 million of the country's total 8 million inhabitants live in Vienna, which, with its banks and large companies, is a huge business market. Due to pressure from the pandemic we developed a suite of products named "Wirt:ual" (editors note: a combination of the German word "Wirt" meaning "host" and the term "virtual") in the country. The goal was to provide guests working from home with fresh and high-quality products.

We knew from our survey that there are two types of customers who work from home. There is the type who is willing to invest time into the preparation of food and the type who wants their meal to be ready in two to three minutes. We developed a specific product range for both types of customers with different degrees of convenience and different pricing structures. We came up with "Fresh at Home" for those who prepare their food in the pan and "Frisch am Tisch" ("Fresh at the table") for those using the microwave.

The meals can be ordered and paid on the Wirt:ual app. What is very important in this context is that subsidies for employers are already included in the pricing. Besides, employees can use the Click & Collect function and then go to the counter in the *company to pick up the food they will eat at home the next day.*

Where are the meals prepared or cooked and how does delivery work?
The food is prepared centrally. We have two models to develop central production kitchens further. 1. We work with existing client locations where kitchens and kitchen equipment are not running to capacity. We remodel them in a way to be suited for out-of-home production. 2. We are establishing dark kitchens that are not dependent on certain clients.

How do the meals reach the homes of employees?
Following various test runs, we outsourced delivery to third parties. And we did that in Amsterdam, Paris, London and Dublin too – in all seven metropolitan regions in Europe, where we tested and introduced similar concepts based on ghost kitchens and delivery.

Are there also new possible solutions for in-house catering in the companies?
One issue we prioritised last year was micro markets. In North America, we have already set up tens of thousands of micro markets with digital payment options, which means that we are probably (we don't have official statistics) the world's biggest and most experienced player in the sector. We are currently rolling out our successfully established infrastructure across Europe. The branding is something the individual national markets decide so that names and colours are as close as possible to the culture and customers in question. To date, we have successfully rolled out our micro market concept in Sweden, Belgium, Switzerland, France and the UK.

Numerous other players have now also recognised the potential of micro markets...
That is correct. As the world's biggest caterer, we are trying to bring the food aspect into play by offering fresh products in addition to standard products like warm and cold beverages and packaged snacks such as snack bars.

Who provides the products for the stores?
If there is canteen kitchen, then the kitchen produces and delivers the fresh products to the stores. That is an important factor in terms of labour cost efficiency. Otherwise, the bowls, wraps or sandwiches are delivered from a central production kitchen. In

Corporate catering of the future

According to Thomas Güther, three key changes will significantly influence corporate catering in the future:

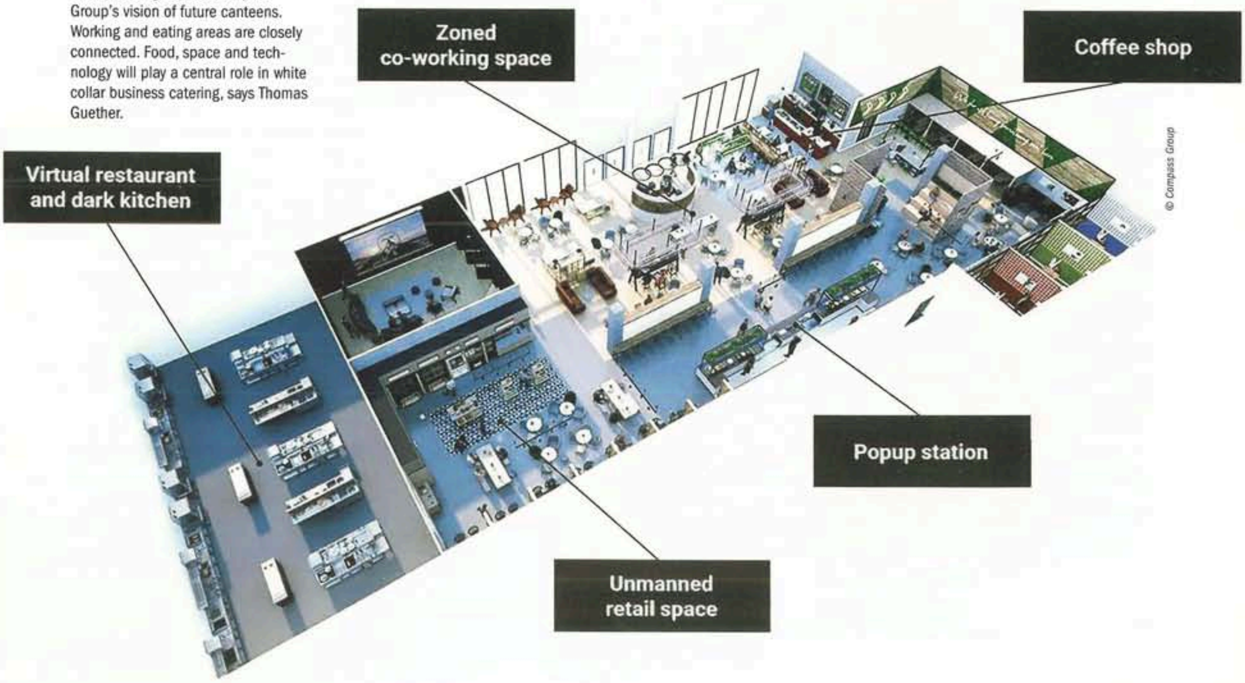
1. Hybrid working: "Office footfall, or the number of days employees choose to work at the office, will change permanently. In general, companies have accepted the hybrid working model and employees also favour the solution. We estimate that employees spend 70% to 80% of their work time in the office. Many employers have opted for the 3-2-2 concept."

2. All-day catering: "There is a change in the way people work together. Big groups like Axa or Siemens are redesigning their workspaces to turn them into meeting places and co-working spaces where employees can both work and eat. Queues at lunch time will increasingly disappear. Many employees who commute buy their breakfast on the way. We can offer them a healthier, fresher alternative at their workplace. Offering employees food and drinks all day brings opportunities but also challenges for us contract caterers, who have to deal with shift schedules and the when, where and how of preparing and supplying the food."

3. Sustainability: "The awareness of the issue has grown immensely as have requirements when it comes to the food on offer. People want food to be healthier and more sustainable and to also produce less waste. There are guests who want to know the carbon footprint their meal has."

"Naturally, pre-ordering, click and collect and digital payments are also part of the digitalisation of processes and product ranges"

This rendering depicts Compass Group's vision of future canteens. Working and eating areas are closely connected. Food, space and technology will play a central role in white collar business catering, says Thomas Guether.



© Compass Group

Originally designed for the group's micro markets in Belgium, Tom-&Della's product range is now also available at supermarkets.

© Compass Group

In addition to fresh products to heat up or prepare yourself, the Wirt:ual range also includes ready-made meals to keep in the fridge. This allows employees working from home to stock up on lunch or take home dinner from the company for the next remote work day.

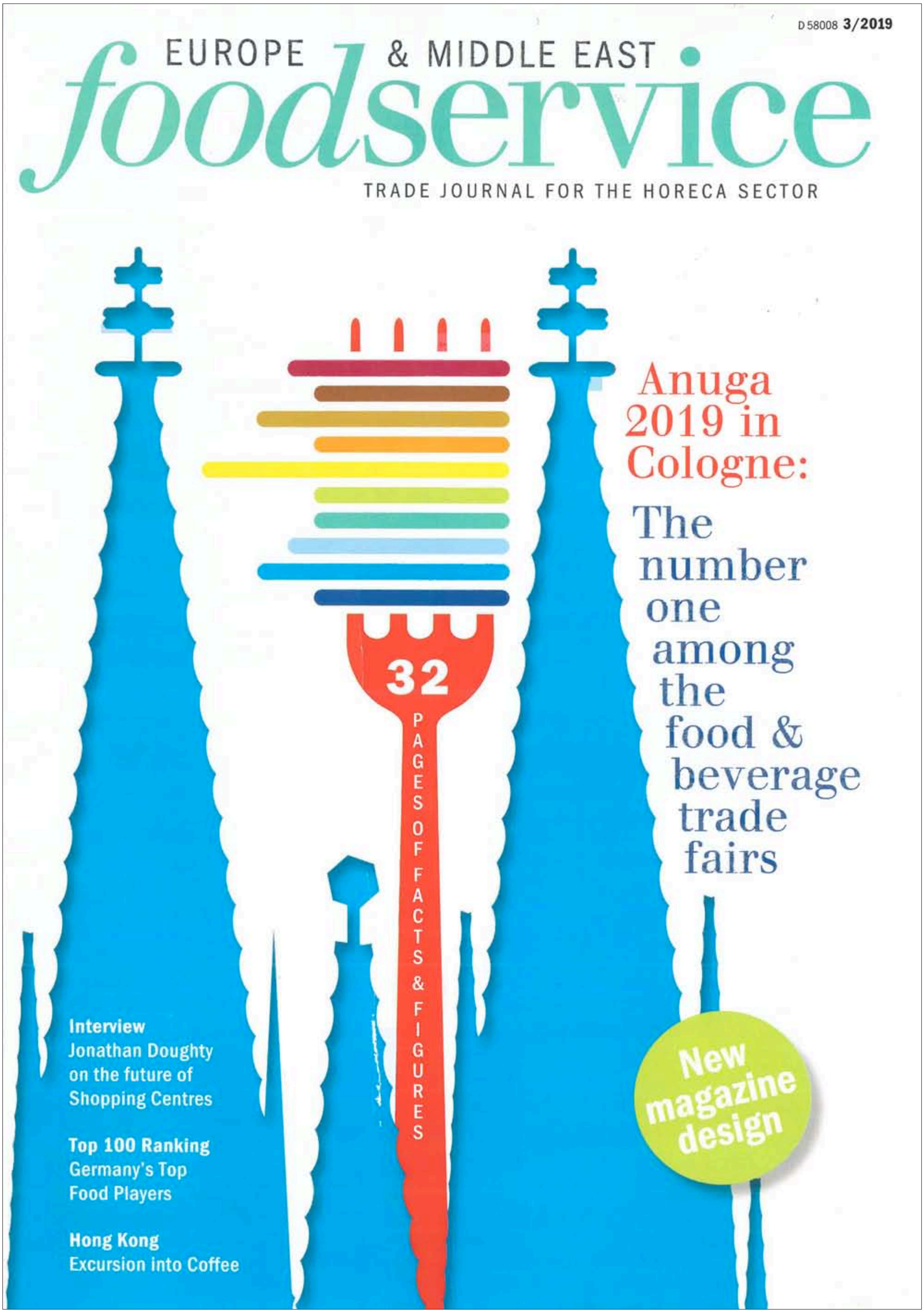
metropolitan regions, we could also provide micro markets in other companies in the city with products from existing canteen kitchens that are not running to capacity.

In Belgium, the products of your newly launched Tom & Dellas brand reach not only employees at your contract companies. Can you elaborate?
The idea behind Tom & Della's was to offer high-quality food in a new world. What started out as a premium salad brand, today includes complete meals with a fantastic packaging that was designed by our team to be fully sustainable. The highlight is that, after heating the meal, the bowls open at the base so that the food falls onto the plate and looks like it was served at a restaurant. So not only the taste is right but also the looks.
Today, we not only stock our own micro markets with Tom & Dellas products but also deliver them to several supermarkets. We are also cooperating with 80 different restaurants. Demand is currently booming; we are occupying a new market segment. Today, we are producing more than 10,000 products a month. And now we have to expand our production facilities. As a next step, we will expand operations to the Benelux region.

Do you plan to open your company canteens to external guests?
Serving external guests in the canteens could open up an additional channel that offsets declining footfall. In the Nordic countries, where staff catering is not subsidised, that concept is used quite often. It is not applicable to every customer and every location though. It works mainly in big cities, where we are in city centre locations with walk-in customers or as part of campus projects, where the life of a usually younger workforce centres around office life and where guests like to eat or drink together in the evening as well.

What is your vision of company canteens in the future?
We have identified three areas that will play a central role in white collar business in the future: food, space

FUNDAMENTALS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EUROPE & MIDDLE EAST
foodservice
TRADE JOURNAL FOR THE HORECA SECTOR
Anuga 2019 in Cologne:
The number one among the food & beverage trade fairs
32
PAGES OF FACTS & FIGURES
Interview
Jonathan Doughty on the future of Shopping Centres
Top 100 Ranking
Germany's Top Food Players
Hong Kong
Excursion into Coffee
New magazine design

EDITOR'S LETTER

Boris Tomic
Editor in chief
boris.tomic@dfv.de

A brand new menu

To all our readers: You know it all too well from your own experience – now and then you have to change the programme. Just as every good restaurant must revise its menu from time to time and rejuvenate it with some smart ideas, so a trade magazine, too, must watch out that it doesn't go too stale.

Modern times deserve modern clothes – over the last few months we have been working intensively on a new layout for '*food*service Europe & Middle East.'

Now you have the result in your hands – the first edition of your magazine in a new layout. Our aim in doing this has been a clearly defined one: we want to launch a new generation of trade magazine. More white space on the pages; a visual imagery which is a bit less busy and all the more exhilarating; modern graphics and diagrams – the classic publication for professional food services has turned fresher, clearer and more legible. The professional relevance of the texts, needless to say, remains at the very centre of the magazine – though it has also now been made easier for the reader to thoroughly get to terms with the topics.

The classic title story, the topic which the editorial staff consider the most interesting, now gets the strongest presentation in the new magazine. We spent quite a long time considering whether to change the logo on the title page. But, since we in the editorial department thought the old Food Service lettering was rather behind the times, the decision to modernise the logo was ultimately taken quickly.

Categories such as league tables, the main interview, the story from the Middle East, thorough knowledge of the market and interesting case studies will continue to be the anchor points of *food*service Europe & Middle East. The new *food*service magazine will continue to stand, as it has for decades, for professional expertise, combined with central service and consultancy ideas – now with even greater reader enjoyment.

Naturally we have also fashioned our special on the Anuga in Cologne in the new look and feel – 32 pages full of information about the major trade fair in October – from which we have also created our title topic for this first issue in the new layout.

Please do let us know whether you like the new magazine. And, even more importantly, please also let us know what you don't like and what, in your view, we could improve. We look forward to your feedback.

Front page: photomontage Adobe Stock. Photo top: Salome Roessler


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International Trade Journal
for the Hotel, Restaurant
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Special Features: Market Analyses The Netherlands, France – Hamburg Foodservice Prize

FUNDAMENTALS

Two Decades in a Nutshell


Gretel Weiss 1998


Gretel Weiss 2018

2000-2020+: We take you on a journey in time through Europe's foodservice landscape, spotlighting the epicentres of change and highways of innovation, anticipating the challenges waiting around the corner. Condensed into 20 pathbreaking theses by Gretel Weiss, publisher of FoodService Europe & Middle East.

1 The boundaries are becoming more and more blurred in the away-from-home market: between the retail and restaurant trades, main meals and snacks, local and international cuisine and, increasingly volatile, online and offline.

2 Everyday life is becoming less structured and time stress a mass phenomenon. The mobile consumer wants pleasure to go. The take-away and delivery businesses are growth heroes.

3 The quick-service category continues to be the dominant driving force for professional foodservice with a growing spectrum of concepts on all service levels. Fast food develops into good food fast. In particular, bread-based meals are proving to be generalists in everyday eating habits.

Gretel Weiss, for many years Editor-in-Chief of foodservice and now publisher of both B2B publications, was the driving force behind 'going international' with FoodService Europe & Middle East.

4 Coffee bars symbolise the evolution of eating and drinking in many parts of Europe. They fascinate the young generation – as entrepreneurs, too. And, at least since the turn of the century, with a powerful impact on the whole sector.

5 Food craftsmen are moving into the foodservice business, especially in Germany, Austria and Switzerland, with more and more bakers and butchers offering food to consume on the premises or on the go. Their advantages: Heavily frequented sites and a reputation for quality and freshness.

6 Explosion of location options for most concepts. Transport-related sites (road, rail, air) are growing in significance for everyday foodservice operations.

7 The garden is tomorrow's living room. Outdoors is mega in. As an alternative to the everyday working life indoors. Restaurant properties without outdoor seating are becoming increasingly unattractive, even in urban settings.

8 Millions of consumers with more and more food knowledge and experience oscillate between the market place and the world market. The growing number of international cuisines offering new taste experiences is seen as culinary wealth and makes our sector more attractive.

9 In culinary terms, Italy has developed into a second homeland for a vast number of consumers. And not only for consumers in Europe. Pizza and pasta have long been domesticated. Italian works everywhere with impulses for cuisine of all kinds.

10 Asia is the great trend reservoir for practically all concept categories: feminine recipes with fresh taste profiles. Street kitchens are a source of inspiration for many concepts. On the waiting list: Latin American cuisine.

II 20TH B'DAY FOODSERVICE EUROPE & MIDDLE EAST 4/18

20

FUNDAMENTALS

11 Hamburgers, pizzas and sushi are the undisputed stars – each still symbolises the culture of its country of origin. The rapid democratisation of sushi in both the restaurant and food-retail trades must rank as one of the most exciting developments of the last ten years.

12 At the same time, people are eating and drinking domestic products again. In the nutritional biography of the human race, domestic cuisine will always play the leading role. Traditions can underpin trends, and trends can reposition traditions.

13 Culinary consumption patterns are also changing with a growing mix and match of fast and fine dining, discipline and enjoyment. The former opposites of health and pleasure are rapidly becoming a partnership under the heading of healthy hedonism.

14 Freshness has been the mantra for many years with 'fresh, fast, attractive' the motto of more and more new concepts, especially in the rapidly growing fast-casual category. Natural products perceived as artisanal are trending.

15 Crafted. The next evolutionary stage: craft beer, craft spirits, craft bread, the list is almost endless. The driving force for both retail and foodservice start-ups. Including, in a nutshell, everything prefixed by 'better'. Personalisation is the next major theme.

16 Sustainability – the new organic. And not only in the case of food. Resource efficiency in the construction and operation of restaurants is a future leitmotif. Great efforts are being made in the packaging sector.

17 Style has replaced standards. Functionality alone is out even in the case of quick-service concepts. Consumers are hungry for emotions and experiential worlds. A homely environment is becoming the key to success.

18 Digitalisation. Restaurants are less threatened in their existence by the internet revolution than the bricks-and-mortar retail trade. Their value chain cannot migrate to the internet, or only do so to a minor extent. Nevertheless: online activities are becoming increasingly critical for offline revenues.

19 Franchising is developing into the preferred growth option for both established and new concepts. More and more institutional partners are getting involved, especially when it comes to travel locations. Additionally, private equity is growing in significance for financing whereby crowdfunding offers new perspectives, particularly for newcomers.

20 Guests do not go looking – they want to be found. The onus for trendy innovations is primarily on the restaurateur rather than the consumer's collection duty. Most guests want to be tempted. Not just be catered for.

Editoriales

Figuran en este apartado editoriales, o parte de ellos, firmados por las conocidas editoras de la revista (Andrea Lottman les acompañó unos meses) y quien les sucedió ,Boris Tomic.

BAKERY & SNACKS

... tastes better and better. In fact, salty bakery snacks and bread-based meals are becoming increasingly popular among Europe's consumers – especially for eating away from home. Baking is now seen as being more on a par with cooking, and foodservice suppliers of all kinds have taken account of this. As have their retail colleagues. Today, bakery snacks are not only playing a vital role in coffee bars and a variety of fast-casual, snack-oriented, all-day concepts, but also a must for filling stations, supermarkets and delicatessens. And while new bakery-café formulas are springing up everywhere, conventional bakers' are moving into the fast lane with a sharper focus on foodservice (see Part II of our Pan European Survey on Bakery Cafés, from page 8).

In line with this, a layout which lets customers 'look over the baker's shoulder' is one of the main ingredients for the new brand of the German Kamps bakery-group, one of Europe's biggest bakery chains with some 700 stores, all of them in Germany so far. Launched in 2009 and called Kamps Backstube, the new concept has around 50 outlets to date and is set for accelerated expansion in Germany and abroad. In distinction to the established Kamps bakery stores, Backstube puts greater emphasis on foodservice, explains Jaap Schalken, CEO since 2003 and, following a management buyout last year, Managing Partner at Kamps GmbH, in our interview (from page 36).

While bakeries and bakery cafés inevitably offer some products with a relatively high sugar content, this is certainly the case for a closely related product category that was virtually written off but is now staging a comeback throughout Europe – desserts, patisserie and confectionary. Sweets are sexy (again) – and that despite all the hype about healthy eating. Comforting for the soul, especially when life has been a bit sour, sweet treats have cast off their ignominious stigma. Figure-friendly or not, the zeitgeist has given them a new lease of life in accordance with the motto, 'indulge yourself' – in moderation, of course, and seriously. In other words, the focus is on quality not quantity, artisanal production, high prices, opulence and beautiful presentations. The dessert section of the menu wants to be more than just an addendum. Throughout Europe, new sweet concepts – mostly to be found in the twilight zone between foodservice and retail – are shifting the spotlight to choco-

ABOUT IGNASI FERRER

Economic conditions continue to be challenging for foodservice operators in many parts of Europe and beyond. Which gives rise to the question: how can they weather the storm and secure their customer-base at the same time as generating growth?

At the 13th European Foodservice Summit last September, Ignasi Ferrer, CEO of Spain's Eat Out Group, gave an open and highly emotional talk about the group's successful approach to crisis management. In the beginning, there was a shock – a big one. After years of having fun beating all records in terms of profits, the group found itself in the middle of a huge economic storm in the summer of 2008. "Riding out a storm is hard work but people can still enjoy it," said Ferrer. "It's a matter of attitude." In his opinion, the decisive factor is a willingness to reconsider the entire structure of the company, and to immediately transform the business according to the new needs of the customers (see from page 54).

ABOUT ROWLAND´S THESIS

Success in the foodservice sector? Robin Rowland has his own theory about this. He came to Yo! Sushi in 1999 when it was but a small seedling. For the last 15 years he has been CEO and the company is now the UK's leading kaiten sushi-bar chain with 81 outlets (ten of them abroad) and annual revenues of €70.1 m. Indeed, Yo! can boast the highest visit frequency of any national sit-down casual dining brand in the UK with over 6.5 m guests a year. Yo! is also seen as one of the coolest brands, alongside Nando's.

And this is Rowland's thesis: "My theory of successful restaurants is that the best operational teams are tribes. They come together with a particular culture and objectives and can achieve tremendous results. They communicate with a special kind of shorthand and shared values. But it is also hard to maintain tribes, especially when a change of ownership happens." Find many more inspiring ideas and insights in our interview with Robin Rowland beginning on page 36

Editoriales

PIZZA & BEER

Who would disagree that pizza has become nothing less than a globally owned product, domesticated and adapted to each nation's taste, and is hardly perceived as original Italian fare anymore? Notably, the big multi-national players dominating the sector are companies such as US-based Pizza Hut, Domino's and Papa John's, as well as Vapiano from Germany (with both pizza and pasta) and Pizza Express from the UK on a European level.

However, Italy is ready to strike back. In our interview (from page 38), Franco Manna, founder of Rossopomodoro, the country's leading casual dining pizza brand with some 90 outlets, and president of Sebeto Group, insists that nowadays there's a global demand for authenticity. "In the United States, pizza is traditionally a mass-market food and, until a few years ago, they didn't know what an authentic Neapolitan pizza was. Now they can appreciate the difference." Which opens up new perspectives for Rossopomodoro, as the brand is now ready for accelerated growth overseas.

Hailing from Naples, Rossopomodoro offers an authentic food experience with traditional Neapolitan pizza, prepared by pizzaioli from Naples. All main ingredients are sourced from Naples and the Campania region. Which, according to Manna, ensures the brand delivers an authentic taste.

The yearning for authenticity also gave a boost to a completely different product that has been creating a sensation in the USA and Europe in recent times: craft beer. Very much like pizza, beer has been a mass product for many years. The global market is dominated by big breweries and competition is fierce, especially against the background of demand that is tending to decline. Interestingly, this has opened up room for niche products, with more and more micro-breweries coming on stream. They create extraordinary beers using artisanal methods and small quantities, at the same time as emphasising quality and taste. The variety is almost intoxicating.

COFFEE BAR & BAKERY CAFÉ

In many European countries and the UK in particular, consumers' thirst for coffee is still growing, as shown by our brand new ranking of the top 75 coffee-bar players in Europe for 2014. Once again, the top trio of Costa Coffee, McCafé and Starbucks leads by a large and rising margin. Today, with a good 6,000 units, the big three account for over two thirds of the top 10 store volume. All in all, the top 75 stand for 12,826 outlets – a joint increase of 6%. Market leader Costa Coffee once again achieved impressive outlet growth of 10%.

Given the difficult situation in Greece, it is remarkable that Greek players are well under way in the European coffee-bar market, with a respectable four players among the top 20 brands, all of them having managed to climb up the ladder compared to 2013. Besides Coffeeright in 7th place (up from 8th), everest and Flocafé, there's a new name in our ranking, which has shot straight into the top ten of the top 75 brands: Coffee Island. Find our exclusive ranking and comments from page 26. In addition: a glance at the UK coffee shop market (from page 34).

In the immediate conceptual neighbourhood to the coffeebar segment, bakery cafés are reinforcing their foodservice profile. Naturally, breadbased snacks and take-aways are part of a constantly expanding assortment, as is a broad spectrum of coffee specialities. As if this were not enough, bakers are moving into different product spheres with the aim of generating more visits, e.g., salads, pizzas and everything that can be baked with a topping. Atmospheric upgrades are part of the process, as is a range of beverages that can even encompass wine & co. Read more in Part 2 of our Pan-European Survey on bakery cafés starting on page 8.

Now that the first signs of spring have arrived, outdoor eating places are in great demand among city dwellers. Especially popular are locations at the waterfront – or on the banks of a river – and, ideally, easy to reach in the city centre. In our Hot Trend section, we present selected riverside locations in European metropolises. Part 2 of our excursion to places to unwind with a view of the water takes us to Germany, Austria, The Netherlands and Spain (from page 22).

Editoriales

BURGERS

That's premium burgers in a nutshell. Indeed, they are the epitome of the desire of modern consumers for artisanal products distinguished by honesty and authenticity. The transformation began in the burger's home country, the USA. However, numerous new concepts have also joined and strengthened the better-burger party in Europe over recent years, and no end is in sight: sales continue to rise in all major markets. In more mature markets such as the UK, there are several multiplied brands including Gourmet Burger Kitchen, Byron Hamburgers, Handmade Burger Co and Five Guys, an import from the USA that can already boast 30 outlets. It's impressive to see what has long been considered a niche product develop into a highly influential movement: to such an extent that the well-established big players in the burger sector are struggling to keep up with the trend and maintain the lead in terms of what a good burger is all about.

In fact, the burger has undergone a qualitative and culinary upgrading, and developed into the centrepiece of a wide spectrum of fast-casual and casual-dining restaurants. In part 1 of our Pan-European Survey on Gourmet Burgers, we take a close look at the sector, its driving forces and main players in the UK, France, Italy, Spain and Switzerland (read more from page 8).

Premium Burgers are also a big thing in France where, according to NPD Group, 970 m burgers were sold across all OOH distribution channels in 2014, that is to say an increase of +13 % over 2009. The power inherent to the product is reflected in the success of Burger King, back again in the French market since 2013. By the end of last year 21 operations were in existence. Projected across the whole year, their turnover is expected to reach the €100 m mark. Nevertheless, the French away-from-home market has not yet reached the end of the tunnel and the sector recorded falling levels of customer visit frequency for the fifth year running. Read more in our report on the top 30 French foodservice companies and their performance in 2014 starting on page 26.

DIGITALIZATION

Add urbanisation: these are the inescapable dimensions of the 3D Matrix we are living in, according to management guru Kjell A. Nordström, key note speaker at last September's European Foodservice Summit in Zurich. Capitalism or the market economy has definitely conquered the world. There are currently about 200 countries on earth, all of them capitalist, one way or another, except one – North Korea. At the same time, we are at the beginning of the fastest process of urbanisation ever documented in human history. Today, 64% of the world's population lives in cities – a hundred years ago, it was just 10%. And in 25 to 30 years, 600 cities will be home to 80% of the world's population.
The social, economical and political implications are huge. Furthermore, the fact that we are all connected in cyberspace will change the way any industry will be organised, predicts Nordström. But what does this mean? Multipolarity is the keyword: a chaotic system where it is impossible to make any proper predictions, including predictions about consumer behaviour. And this means that plans, projects and budgets will be a thing of the past.

It was with these and more thought-provoking ideas that the summit speakers confronted their audience – lots of inspiring food for thought. Also in Part 2 of our Summit report (beginning on page 40): Dr David Bosshart, GDI Institute, on digitisation as the ultimate megatrend, which will change our life radically, i.e., relationships, the structure of organisations, politics. In the age of software, any company is first of all either a good or a bad software company, claims Bosshart. And in any industry, nearly all innovation is due to software innovation.

EDITORIAL

Boris Tomic
Editor in chief
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OUR 10 THESES

The question we have to ask ourselves in the face of the ongoing pandemic is not whether we like it or not. That would get us nowhere. It would lead to self-pity and disappearance from the market in the medium term.
Foodservice operators think differently – at least those who will continue to be successful in their business.
They take stock of the situation and draw their conclusions. Because one thing is certain: after the pandemic, their business will have changed – the industry is facing a massive transformation.
We will see this change both on the operator's and on the customer's side. Operators who want to earn money in the long run have to face this change. This requires courage and foresight and an approximate idea of what consumers will demand in the future.

Magazines like the one you are holding in your hands were made to help and give orientation. Our cover story is about the war on waste – the enormous amount of food that is wasted in the foodservice industry – and about the ways in which operators in different European countries are trying to reduce this waste in our industry...
The fight against food waste will certainly be a central issue in the future. But we believe there will be other issues that will be crucial to the future success of the restaurant industry.
In the following, you will see ten theses that we think will soon significantly determine the market.
These theses do not claim to be complete or to mirror any kind of absolute knowledge. They are the result of intensive market research and many discussions that the editorial team has had with experts over the past few months.
So, take a look at these theses – and feel free to pick out one or two of them and either act upon them directly, because you are also convinced that they will come true. Or – which we as a team would appreciate at least as much – discuss them with us. We look forward to it.

HERE WE GO:

1. Delivery services and drive-thrus will grow.
2. Kiosk ordering – everything via terminals and apps, as long as it is contactless.
3. Online offers in general – there will be a change in trend, because in terms of online appearance chain restaurants are the "new fancy French" – at home is where the action is.
4. New work – office sharing models will boom. People need catering close by.
5. More people working remotely from their homes – vending machines nearby that offer high quality F&B will win.
6. Ghost kitchens will become more popular. They're also an attractive option for individual restaurateurs.
7. Sustainability and ecological awareness – the carbon footprint of your meal counts as well as the reduction of food waste in general.
8. The "do good" idea will also be much more topical in gastronomy (e.g. planting trees).
9. High convenience products will boom in times of shortage in kitchen staff.
10. Create luxury moments at the restaurant as a contrast to home meals – the "I treat myself" principle. More expensive than before.

NOW ON THE INTERNET

Our international homepage has enjoyed increasing popularity - take your time and visit www.food-service.de/international Here you will find numbers, dates, facts and information from the international foodservice market.

Title illustration: VectorMine - adobe-stock.com adaptation

The Gallery

8

Sobre las ultimas ediciones de la Summit: De Zurich a Amsterdam

Los eventos de 2022 y 2023 ya no tuvieron las páginas de FSE&ME como notario de los study tours, las conferencias, mesas redondas y "breaks" con mucho networking, aunque sí los soportes digitales de dicha revista.

Pese a que se mantuvo el elevado nivel de ediciones anteriores, en las reuniones ya se fueron apercibiendo cambios; como los de descentralización de lugares con respecto a la sede en el Like Side Casino, acudiendo a la terraza de los almacenes Globus, al restaurante Masoala en el Zoo de la ciudad o al Carlton Restaurants & Bar, anunciándose en la Summit 24 que esa sería la última celebrada en la ciudad suiza.

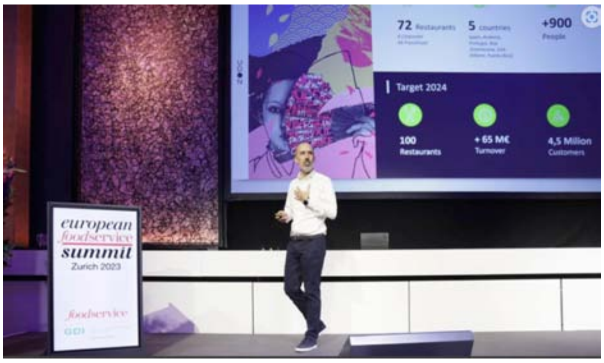
Con relación al programa de conferencias, cabe destacar las mesas redondas dedicadas a la sostenibilidad, donde al lado de directivos de Big Mamma o Itsu figuró Jordi Pascual CEO de Udon Asian Food y la de internacionalización donde participaron Big Chef, empresa turca que crece en Oriente Medio, la alemana Coffee Fellows entrando en los EEUU y Marudane Udon llegando del Japón al Reino Unido.

En cuanto análisis de mercado repitieron NPD y Technomic, siendo novedad Rabobank y McWin. Y en materia de casos de éxito, de entre los presentados, sobresalieron los de Tortilla en el Reino Unido, Block en Alemania, Joe&The Juice de Dinamarca y sobre todo el de Younique Concepts en Holanda, donde Sven Sallaerts ya empezó a destacar como representante de la nueva generación de CEO que pasarán por las venideras ediciones de la Summit.

En relación con los TOP100 Gretel Weiss cedió las presentaciones de los datos elaborados sobre rankings de ventas, durante tantos años, a Katrin Wissmann y el profesor Muller siguió resumiendo y elaborando las conclusiones de los eventos que serían para él también los últimos en Zurich, pues en Amsterdam durante la edición 25, en el año 2024, cedería sus competencias al profesor Olderog de la Universidad Akad en Stuttgart.

También se dio oficialidad en relevos en la composición del nuevo think tank donde el foodservice de España estará representado por Patricia F. de Arroyarbe.

La última reunión en Zurich fue aprovechada también para otras despedidas y encuentros, de colegas



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1- Jordi Pascual

2- Sven Sallaert

3- Gretel Weiss en la Summit 2022

4- Think Tank 2023

3

4

que también son amigos, gracias a encontrarse periódicamente en la Summit. Sirvan como ejemplos los de Bosshart con Ferrer o los de Ordovsky con Todd, por no reiterarnos citando al triunvirato organizador de la Summit que no perdió ocasión de hacerse la tradicional foto de familia.

En cuanto a la reunión número 25 de la Summit en Amsterdam, nuevos lugares y rostros no desentonaron con el escenario de Zurich, contando con una nota positiva: la presencia de una delegación de Marcas de Restauración que augura garantizar mejor representación del foodservice español en ponencias (se contará también con la colaboración de Edurne Uranga en su calidad de Vicepresidenta de Circana) y asistencia, siempre escasa, pese a que a las reuniones han asistido restauradores independientes como Miguel Arias (Flanigan), así como interactuación incluso en territorio español, donde ya Katrin Wissmann hizo acto de presencia en Barcelona durante Alimentaria 2024.

6


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8


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6- D. Boshhart e I. Ferrer 2022

7- Ordovsky y Todd

8- La troika de la Summit

9- Verger (MdR), Wissman (EFSS), Bonezzi (MdR), Uranga (Circana)

10 - Lou Verger y G. Weiss

11 - Miguel Arias y S. Winegar

10


11


european foodservice summit
21st
SPECIAL DIGITAL EDITION
MARIO C. BAUER
Dr. DAVID BOSSHART
FLAVIA FRESIA
JULIA MATVEEVA
Prof. CHRISTOPHER C. MULLER
MERT ASKIN
JOCHEN PINSKER
2020
PHILIPP LAQUE
When the Covid pandemic struck in the first quarter of 2022, planning for the 21st European Foodservice Summit was already underway. The topics had been defined, and the first speakers had confirmed their participation. However, like many other events worldwide, the Summit had to be canceled that year. In response, we launched a series of Digital Talks over the following months, focusing on the issues that were most pressing for the hospitality industry during that challenging time.
FLORIAN SCHNEIDER
topics
The next normal – between hope and fear: What goes away, what stays.
The road to future: The foodservice world after Covid-19.
Beyond lockdowns: How Europe's restaurant industry is dealing with the restart reality.
F&B facts from around the world:
- What's going on in the Middle East
- Dr. Oetker goes F&B operations
Future drivers of our industry
Restaurant trends in times of a pandemic: Options & opportunities
WALTER SEIB


22nd european foodservice summit
BACK TO THE FUTURE
ASLAN SARANGA
CLIVE SCHLEE, MARIO C. BAUER
DAVID BAUMGARTNER
HENRY MCGOVERN
JOSCHKA FISCHER
key takeaways
"Ephemerality" | Click, click, click... There will be no return to normal because normal was the problem.
Daily life has changed our relationship with restaurants. To remain relevant, restaurants must be functional, sophisticated, and meaningful.
Let us do the future better! Personal success: visionary strength and creativity, leading people, and economic thinking.
Leaders are cultural ambassadors.
Expand your horizons. Speed up expansion.
Leading with a growth mindset. Leading with agility. The importance of investing in employees: It is an investment in the company.
Product innovation, digital innovation, image innovation. Innovation is not creativity but learning from other examples – a skill to be learned.
Personal humility, professional will. Kindness is the new religion. "Who knows the name of the building's cleaning staff?"
Go beyond zero and become "climate positive". Removing CO2 from the atmosphere. Be a climate hero before breakfast.
Pizzas are not burgers.
Think like an "activist" investor. Why should we subsidize an industry that we should be taxing?
Do we still need to spend money on digital technology? Internationalize, digitalize, scale.
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Epílogo

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Director Master in Hospitality Management, Lecturer & Researcher
at CETT_UB Tourism & Hospitality, Education/Research

Aprender mirando hacia fuera

Tuve la suerte de ser alumno de Mario Cañizal. Más aún, de contar con su guía como supervisor de mi Trabajo Final de Máster y, con el tiempo, de recibir su confianza y afecto como si fuera un padre profesional. Su manera de enseñar no se limitaba a transmitir conocimiento, sino que, nos invitaba a mirar más allá de nuestras fronteras, a entender el foodservice como un fenómeno global, dinámico y profundamente humano.

Durante años, Mario trajo al aula materiales internacionales de un valor incalculable, muchos de ellos procedentes de la revista FoodService Europe y de los eventos que ayudó a construir y documentar. Hoy, ese archivo vivo se convierte en legado. Su decisión de reunirlo en estos e-books, con fines exclusivamente pedagógicos, es un acto de generosidad y compromiso con las nuevas generaciones.

Estos documentos no son solo una crónica del pasado. Son una brújula para el presente. En un momento en que la inteligencia artificial, la digitalización y la sostenibilidad transforman el sector, entender cómo se construyó la restauración de marca en Europa y en Cataluña, es más necesario que nunca. Mario no solo fue pionero en traer esa mirada internacional al aula, sino también en impulsar la sostenibilidad desde la acción, como fundador de la Fundación de Restaurantes Sostenibles.

Desde el CETT, acogemos con gratitud este legado. Lo haremos accesible a nuestros estudiantes, no como un archivo cerrado, sino como un laboratorio de ideas. Porque como Mario nos enseñó, aprender es también saber mirar hacia fuera, para no equivocarse más de la cuenta… o para inspirarse en quienes ya recorrieron el camino antes que nosotros.

Gracias, Mario, por enseñarnos que compartir conocimiento es una forma de cuidar el futuro.

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 mimar 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 marquistas (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 marquistas o la creación de la asociación de cadenas de restaurantes, la actual MARCAS DE RESTAURACIÓN, 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, HOSTELERÍA 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 FUNDACIÓN RESTAURANTES SOSTENIBLES.

Entre 2021 y 2024 su labor profesional obtendrá el reconocimiento de entidades tales como MARCAS DE RESTAURACIÓN, FUNDACIÓN 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	2000	2005

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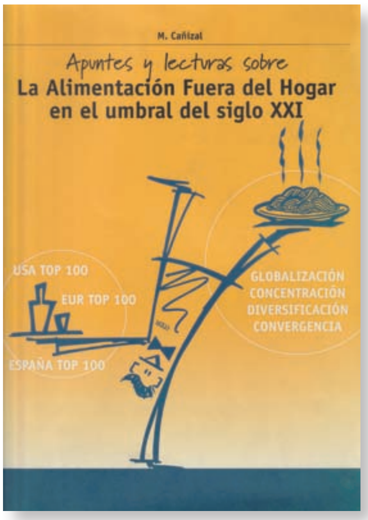

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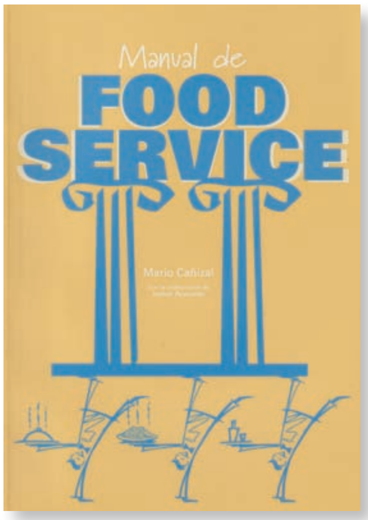

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Publicaciones sobre el sector de Food Service de Mario Cañizal

2022

2024

2024

2024

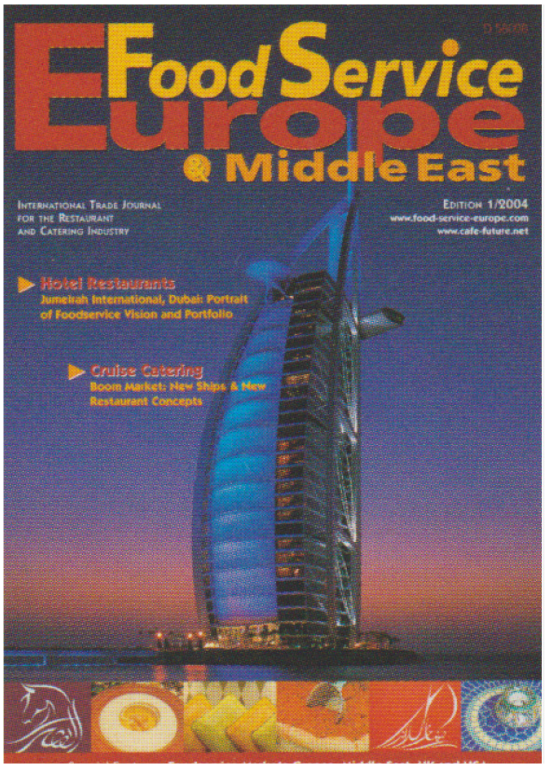
2025

2025

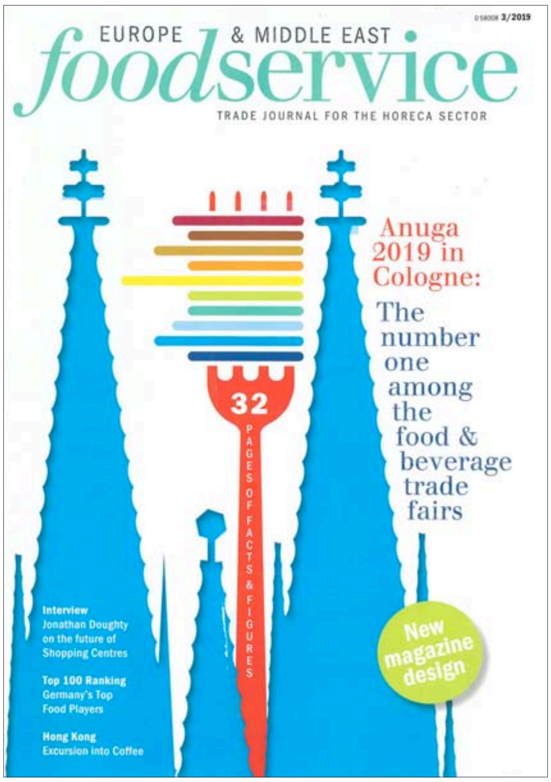
Evolución de la revista FoodService Europe&Middle East

1998-1999

2004 cambio de nombre



2019 cambio de maquetación



2022