



Bord Bia Presentation – 14th November 2012

Who Are Adams Foodservice ?

- We are part of the Irish Dairy Board.
- Set up in 2012 as the UK customer facing platform for Foodservice.
- A wide range of cheese, butter, dairy ingredients are available all under one roof
- We are supported by a number of development kitchens and chef's along with NPD managers to drive innovation in the Foodservice sector.



Why Is Foodservice Such An Opportunity ?

SALES +0.1%
£49.3 Billion

AVERAGE SPEND +0.2%
£4.48

VISITS/TRAFFIC -0.1%
11.0 Billion
-9.1 Million

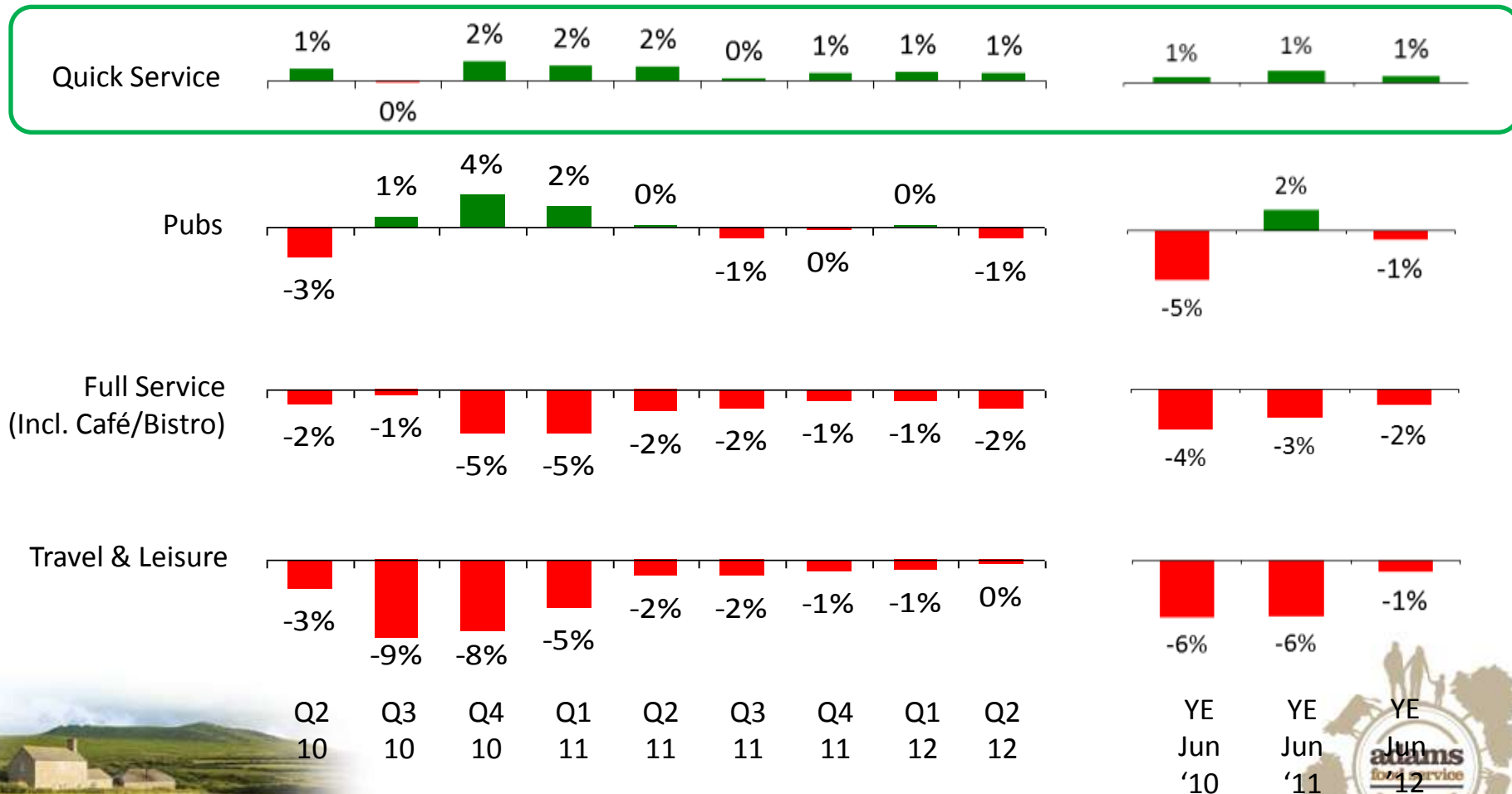
Items Per Person +2.9%
2.5

Price Per Item -2.7%
£1.81



Quick Service Restaurants represent the Foodservice bright spot – with the rest of the market struggling for traffic.

Major Commercial Channels
Traffic Trend (Quarterly & Annual)



Latest Food Taste & Brand Trends..

Great Food with a Twist

New Style Cooking & Tastes – Middle Eastern, New Asian,
Mexican

Good Food Credentials With Health Benefits

Pop Up's and Street Food continue to be popular as they give the operator a chance to trial new items without the expense of a full time location/set up.



How To Serve The Foodservice Market Place And Be Successful

- Recruit knowledgeable individuals who truly understand the sector
- Understand your customer and their customers
- Look for solutions for your customers, don't just sell them a product
- Be innovative, forward thinking and look for ways that you can also deliver added value



Key Trends in Foodservice



- Value & Convenience

- Vouchers/meal deals/loyalty schemes are key to generating footfall



- World Food Trends

- Products that add a twist of flavour, execution is key



- Health & Awareness

- Reduced fat/lower in fat, use less of full flavour products



The Irish Opportunity

- The cows are fed on a grass fed system producing summer milk.
- This process is a sustainable and efficient module and offers the consumer a great tasting product full of added benefits.
- The summer milk is used in both cheese and butter products.



Importance Of Cheese & Butter In Menus

Cheddar Usage

			% Cheddar Usage
1	Sandwich	Main	24%
2	Burgers	Main	18%
3	Vegetable Dish	Main	5%
4	Topping	Add-On	5%
5	Other Dessert	Dessert	5%
6	Pizza	Main	3%
7	Chicken Dish	Main	3%
8	Combo Plates	Main	3%
9	Nachos	Starter	3%
10	Mexican	Main	3%

Butter Usage

			% Butter Usage
1	Beef Dish	Main	9%
2	Breads	Side / Extra	9%
3	Fish Dish	Main	9%
4	Non-breaded Protein	Starter	9%
5	Soup	Starter	6%
6	Breads	Starter	4%
7	Combo Plates	Main	4%
8	Non-breaded Veg	Side / Extra	4%
9	Pudding	Dessert	4%
10	Pasta/Noodles	Main	3%

Cheese & Butter are the most versatile products available and are key items on your menus



3 Key Enables To Success



- **NPD/Insight**
- **Full end to end supply chain efficiencies**
- **Online/Media interaction**

Gain feedback from your customers, as other customers are likely to read those reviews which will prompt them to visit your outlets more

