



**Imperial College**  
London

# Macro-Trends Shaping How, Where & When We Consume Our Food

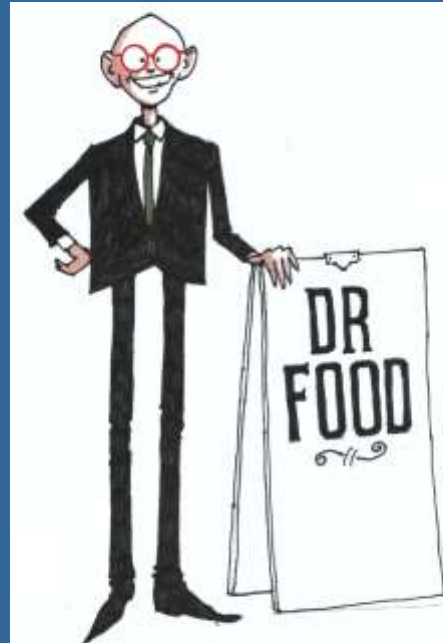
Dr. David Hughes  
Emeritus Professor of Food Marketing

**Bord Bía Food Service Seminar**  
**Killashee Hotel, Co. Kildare**  
Wednesday, November 13<sup>th</sup>, 2019



@profdavidhughes

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



# THE ROYAL GEORGE

• IRSHA STREET, APPLIEDORE •







Appledore, Devon, UK

Patrons:  
Garth & Sascha Hughes









Dr. Food @ProfDavidHughes

In Emilia-Romagna Italian food epicentre. My host: "best get lunch before we leave my region". You don't get that level of pride & loyalty for local cuisine when crossing from Kent to Essex! Cherish food heritage & culture - it's priceless. Italy's got it in spades. Lunch? Delish



## Gaining A Basic Understanding of Food Heritage & Food Culture is a Good Start in Understanding Consumer Dynamics in a Market







**Dr. Food** @ProfDavidHughes

The Remains of the Day (with apologies to Ishiguro)! The aftermath of dinner for my restaurant table Chinese neighbours in Malaysia. 8 diners 14 separate dishes all shared. Understanding food & meal culture of market essential for exporters. Meat & 3 veg. looks a tad boring!





Dr. Food @ProfDavidHughes

Food culture strong in Thailand. Table next to me, 5 diners order 15 platters mix of meat/veg. All shared (no centre of plate meat slab). Asians have been flexitarians for millennia! Most of global 2% growth in meat demand p.a. coming from Asia. We better work out what they like!

Multi-Platter Asian Meals  
Easier to Cater for Those  
With Specific Diets



Many Dishes with a  
Mixture of Colours.  
Flavours, Veggies &  
Meat. All Shared. No  
Need to Eat it While  
It's Hot!



Have a Good Look  
Around the Kitchen  
In a Typical Home of  
the Market You Are  
Interested in – Learn  
A Lot and Quickly!







“The World’s Food is Becoming Americanized”!  
No, It’s Not, It’s Becoming Asianized If Anything!

Sushi: Popular Throughout The World  
Brilliant Snack/Mini-Meal but Not  
Without Supply Chain Challenges.





# Jollibee: Super Asian QSR Operator Comfortable with Global Competition



**PHO 24**  
PHO VIET  
CHINH HIEU

[ABOUT US](#) [MENU](#) [LOCATIONS](#) [CAREERS](#) [FRANCHISING](#) [CONTACT US](#)

**PHO 24**

The taste of Vietnam in a bowl! Our secret family recipe of 24 special ingredients, slowly simmered for 8 hours with 100% beef shin bones. Served steaming hot with premium, lightly cooked tender beef and succulent rice noodles. Unphogettable!

[Learn more](#)

Privacy - Terms





# Chipotle Launches Lifestyle Bowls So Customers Can Achieve New Year's Wellness Resolutions

Paleo, Keto, Whole30® and Double Protein-approved options are now available for delivery exclusively through Chipotle's mobile app and website



January, 2019



## Asian Style Bowls!



## Chipotle same-store sales up nearly 10% as digital sales soar

Digital sales doubled in Q1 to make up 15.7% of sales

April 24<sup>th</sup>, 2019



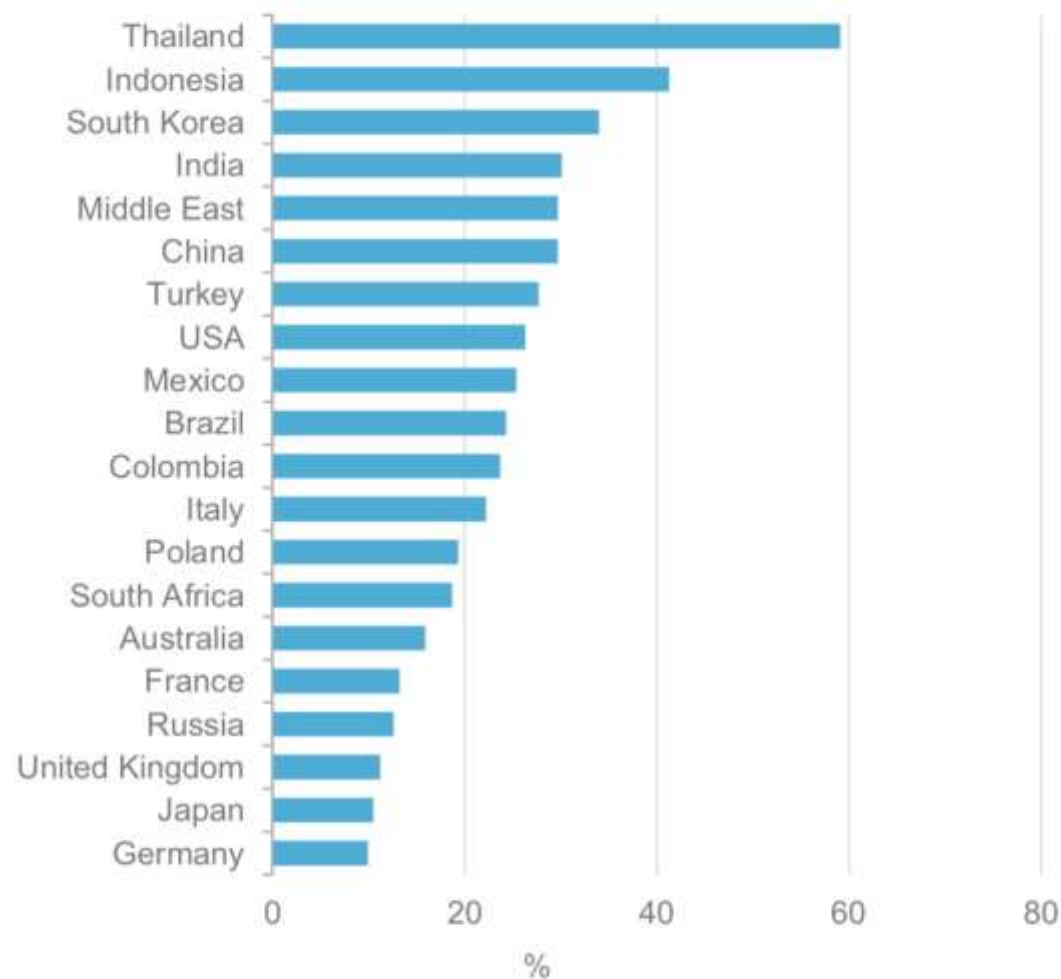


Today's International Menu Includes ... Bowls of .....





### % of Respondents Eating Dinner Outside the Home 3+ Times Per Week, 2017



*Euromonitor International's Lifestyles Survey results are drawn from online consumers ranging in age from 15 to 65+. Between 1,000-2,000 consumers in each market are surveyed each round, with many topics tracked over time.*



Ready Meals have Long been a Feature in Traditional Retail Markets in Asia. “Buy to Take Home” is Cheaper than Home Cooking!





Me and Mr. Boon  
Saphan Mai, Bangkok

Chicken  
Lok Lak

Pork & Liver  
Noodle Soup

Dinner at Shirley's Siem Reap







Less Eco-Active  
in Bangkok!





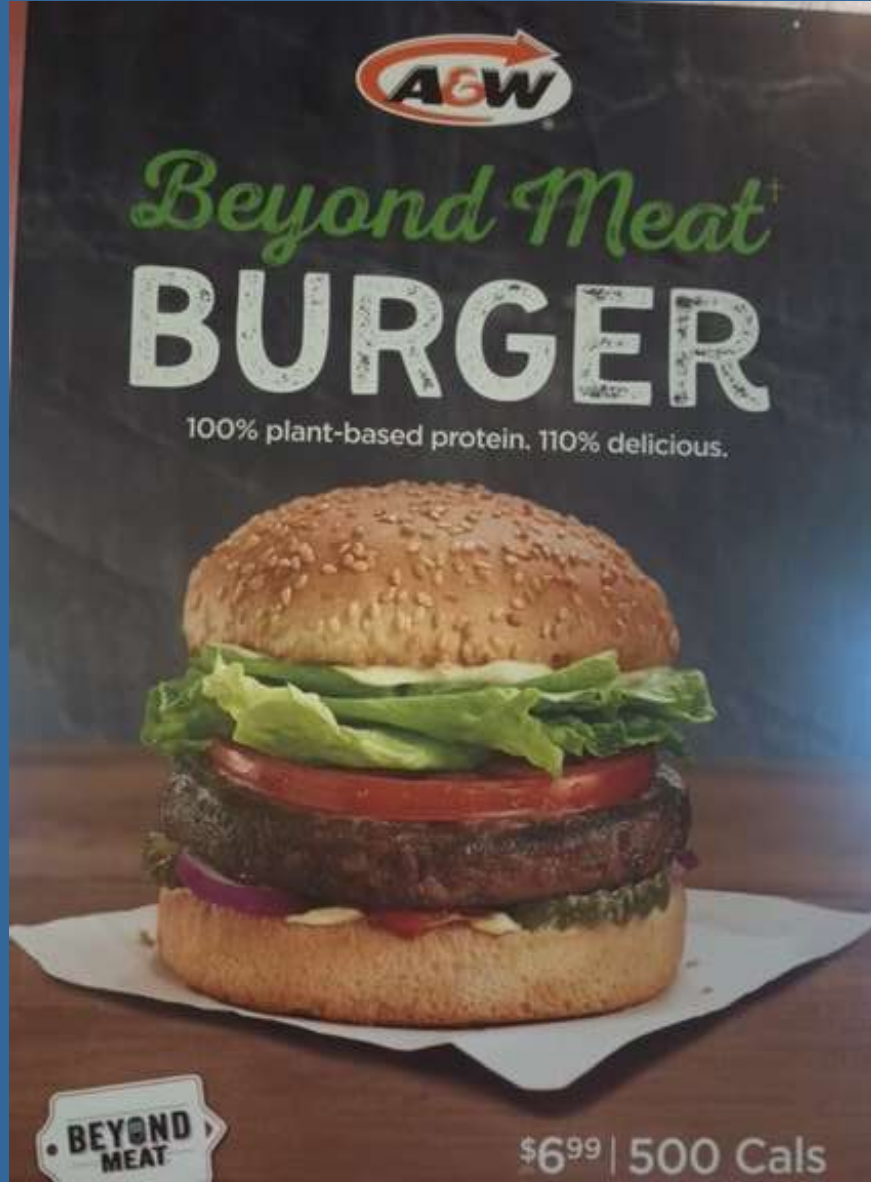
## Frantic Plant-Based Activity in the World of Fast Food in 2019

# Vegan Beyond Burger Launches in 1,000 Carl's Jr. Restaurants Across The US

The patty is part of a veganizable sandwich featuring cheese, lettuce, tomato, sliced onion, dill pickle, special sauce, and mayonnaise



January 2<sup>nd</sup>, 2019



In Canada, a similar notice has been posted at select A&W locations (Photo: Reddit)



Dr. Food @ProfDavidHughes

In Alberta, Canada last week. Beyond Meat plant-based burgers sold out in A&W outlets & in Whole Foods supermarkets. Got one in Red Deer: looks/tastes like a decent regular burger although the "meat patty" is a little softer than the real thing. @ £4, 15% price premium over beef.



# MCDONALD'S LAUNCHES MEATY 'BIG VEGAN' BURGER April 27<sup>th</sup>, 2019

*McDonald's Germany is adding a vegan burger to the menu, featuring Nestlé's meat-like Garden Gourmet "Incredible Burger."*



*McDonald's Germany is introducing a vegan burger.*





## McDonald's tests plant-based burger in Canada

The "P.L.T." sandwich will be tested in Southwestern Ontario

September 26<sup>th</sup>, 2019







# IMPOSSIBLE™ WHOPPER®

Launching nationally in USA  
May 31<sup>st</sup>, 2019



Available at participating restaurants in St. Louis. TM & © 2019 Burger King Corporation. All rights reserved.  
Impossible is a trademark of Impossible Foods Inc. Used under license.

## NEW MEATY VEGAN GARLIC WRAPS LAUNCH AT SUBWAY



*Subway UK has introduced vegan Signature Wraps*



# McDonald's joins the Veganuary craze by offering its first ever vegetarian Happy Meal for children

January 3<sup>rd</sup>, 2019

- The new Happy Meal features a breaded red pesto goujon wrap instead of meat
- A similar wrap will also be available on the adult menu as a Spicy Veggie Wrap
- The meals were created with the help of campaign group the Vegetarian Society





August 27<sup>th</sup>, 2019



KFC tests plant-based chicken in partnership with Beyond Meat

KFC has teamed up with meat substitute company Beyond Meat to trial a new plant-based chicken, available as both nuggets and boneless wings.



# Pizza Hut is testing plant-based 'Incogmeato' sausage toppings and round boxes

October 22<sup>nd</sup>, 2019



**'Incogmeato?' Kellogg is the latest to introduce plant-based burger**

September 6<sup>th</sup>, 2019



Health is the #1 reason Australians choose to eat less meat, closely followed by a four-way tie: the environment, animal welfare, cost and increasing variety of plant-based options available.



**43%**  
OF MEAT-REDUCERS  
ARE BABY-BOOMERS



**57%**  
OF VEGANS AND  
**61%**  
OF VEGETARIANS  
ARE MILLENNIALS



IN THE LAST YEAR, INTEREST IN EATING LESS MEAT HAS GROWN:

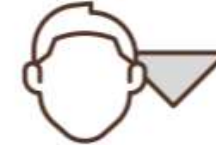


AUSTRALIANS DEFINED  
AS FLEXITARIANS  
HAS GROWN BY

**20%**

**20%**

OF MEAT EATERS  
HAVE REDUCED THEIR  
MEAT CONSUMPTION



**HUNGRY FOR PLANT-BASED:  
AUSTRALIAN CONSUMER  
INSIGHTS**



October 29<sup>th</sup>, 2019





#SHAKEITTOMAKEIT



# Consumers continue to evolve



Technology enabled



Experience focused



Vocal



Trust and ethics



Urbanised



Time poor



Diverse



Transparency



Health conscious



Savvy



Ageing



Authenticity



# The shoppers of the future have five key features



**Be time-  
optimisers**



**Be more health  
conscious**



**Be more  
individual**



**Be more  
experimental**



**Be more  
socially  
conscious**



## The next generation: 'influencer shoppers'

# 25%

of the British  
grocery shopper  
population

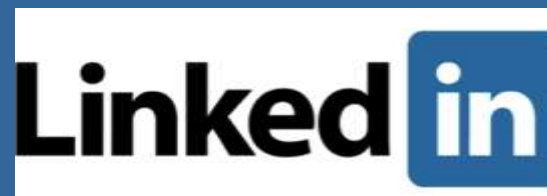
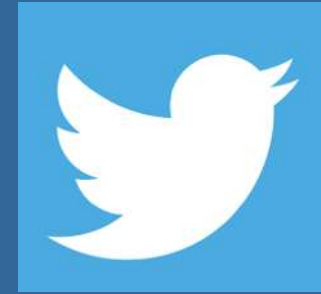


- YOUNGER
- HIGHER AFFLUENCE
- 1000+ SOCIAL MEDIA FOLLOWERS
- ONLINE REVIEWERS
- EARLY TECH ADOPTERS
- ENGAGE IN FUTURE TRENDS



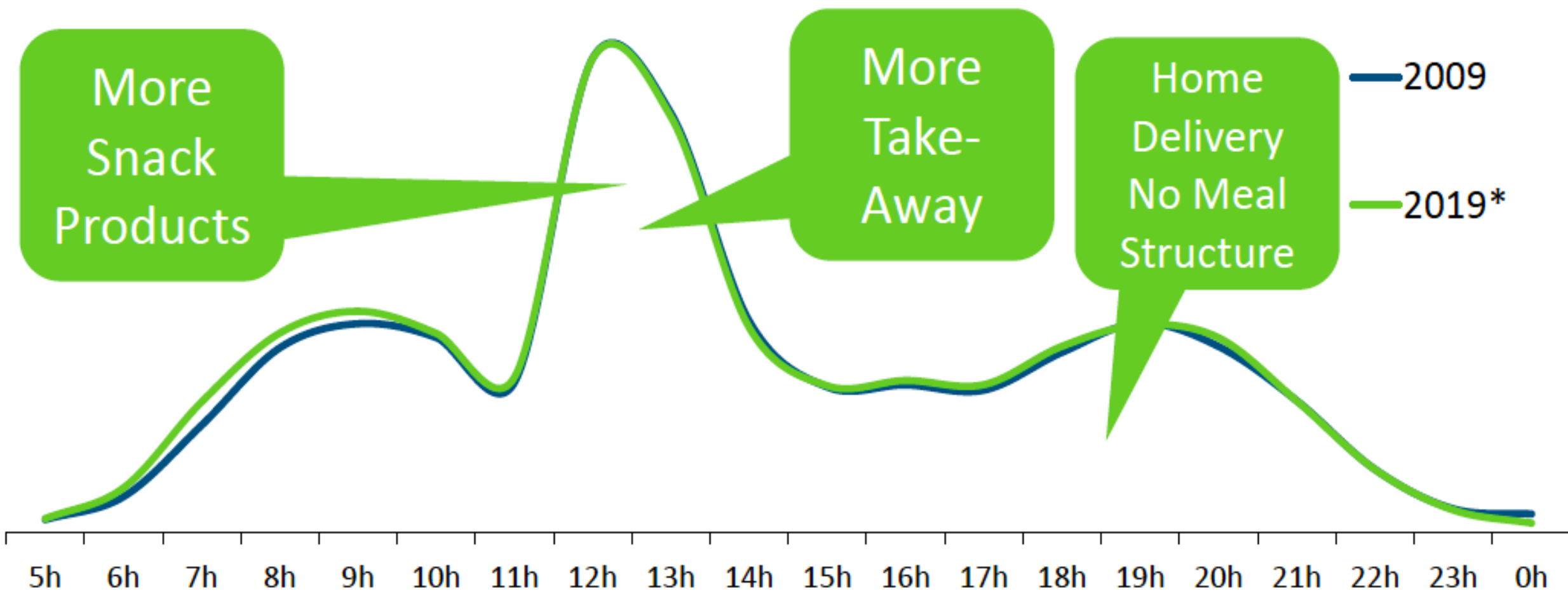


# Social Media Accelerates the Exchange of Information Around the World Not Least on Food Trends and Between Gen. Z and Millennial Consumers











# WHAT and HOW we eat has changed, not when!

Visit Profile by Time of Day – BIG 5 Europe





# FRAGMENTING MEAL TIMES — MUCH MORE THAN LUNCH

CATEGORIES		OCCASIONS		CHANNELS		FORMATS		COMPETITORS	
		Need-led moments							
		 Grab & Go	 Everyday	 Healthy	 Treat	% split			
Occasion-led moments	 Breakfast	3.1%	2.2%	1.0%	2.3%	8.7%			
	 Snack	9.0%	7.5%	3.0%	10.3%	29.8%			
	 Lunch	15.5%	8.2%	3.9%	7.6%	35.3%			
	 Evening	8.8%	4.9%	2.6%	9.9%	26.2%			
	%split	36.4%	22.9%	10.6%	30.1%	100.0%			

Source: Greencore research (Mealtrak) based on engagement with 36,500 consumers annually

# Fast Casual has Been THE Success Story Across all European Countries

## Success factors:

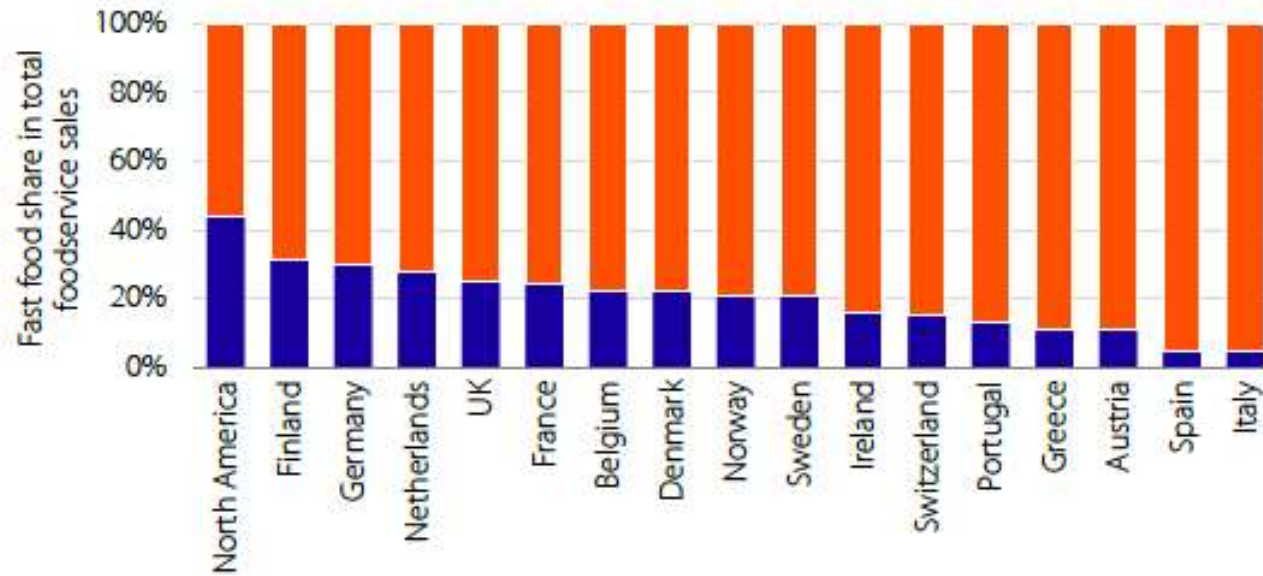
- Fresh Ingredients
- Open Kitchen/Front-Cooking/Transparency
- Customization of Meals
- Focus on Health
- Atmosphere (Entertainment/Fun)
- Value for Money
- Value for Time

**>+15%**  
**Visit Growth**  
CAGR 2018 vs. 2013





## Fast food penetration in Western Europe has room for growth



## Strong sales growths for new healthy fast food brands (CAGR 2012-2017)

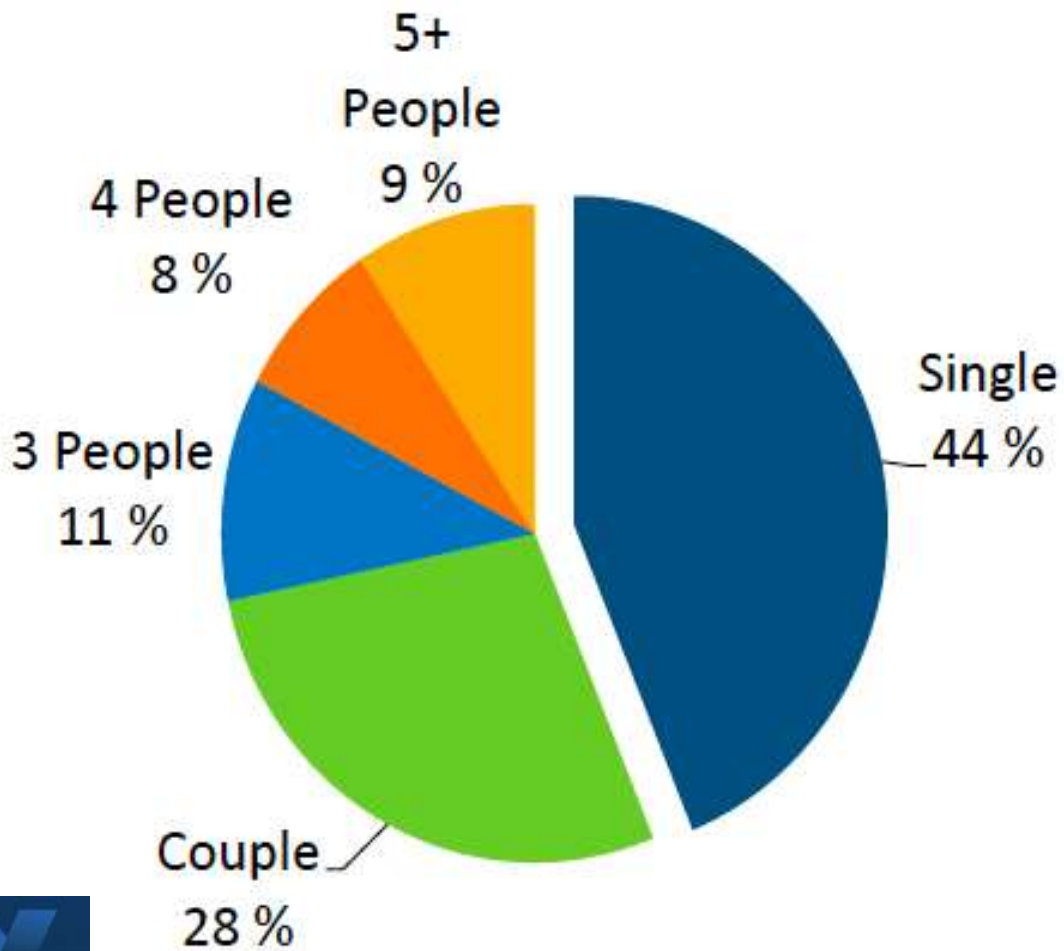


 **Rabobank**

# Single Groups account for 44% of all Tickets



Groups in % by Size – 2019\*

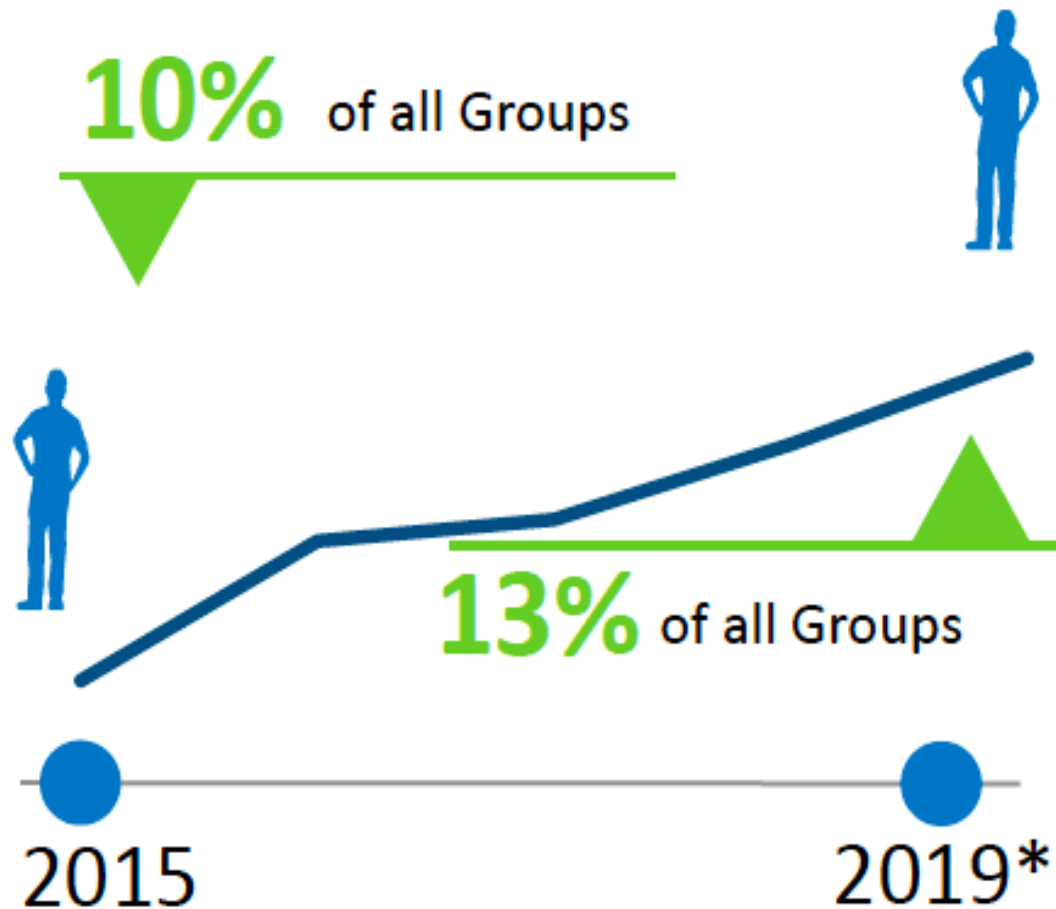






# Solo Dining in Full Service - Overview

Solo dining has been an industry traffic driver for 3 consecutive years and grew 10x faster to total industry in 2019.



## Why is eating alone on the rise?

1. Mobile lifestyle
2. De-stigmatised
3. 'Me Time'
4. Time constraints
5. Rise of single households



Source: The NPD Group/CREST®,  
BIG 5 Europe - Year End June 2019 - Full Service

# Number of Brits eating roast dinners alone increases by 5%

August 17<sup>th</sup>, 2019



Men over the age of 55 are the driving force behind the trend

The “Sorrowful Sad Bastard Meal for One”  
Is Firmly On-Trend in The UK!

But, 1 and 2 Person Households Can’t Spell  
the word “ingredient”. They seek Snack and  
Mini-meal Solutions – Food-to-Go.

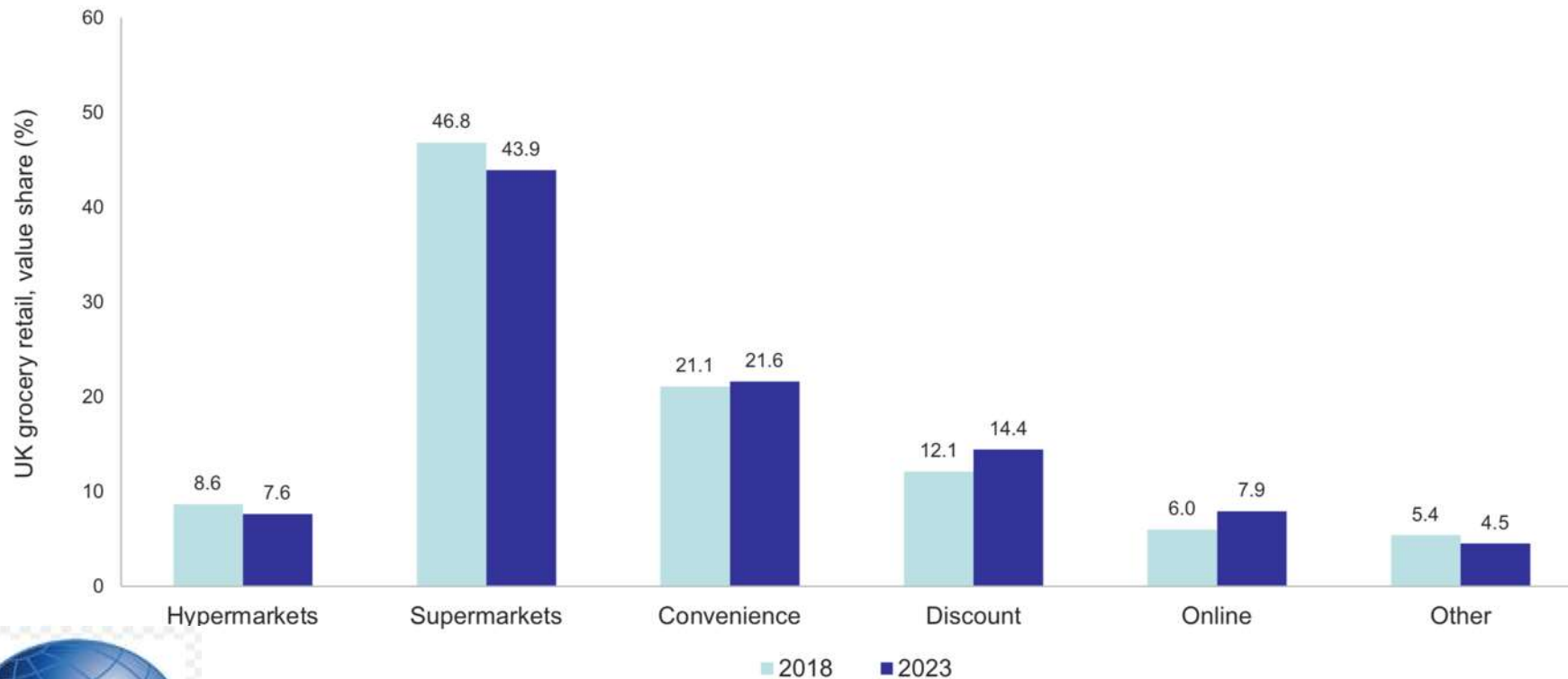




# Slowly, Slowly Supermarkets and Hypermarkets Lose Share in UK Grocery Market



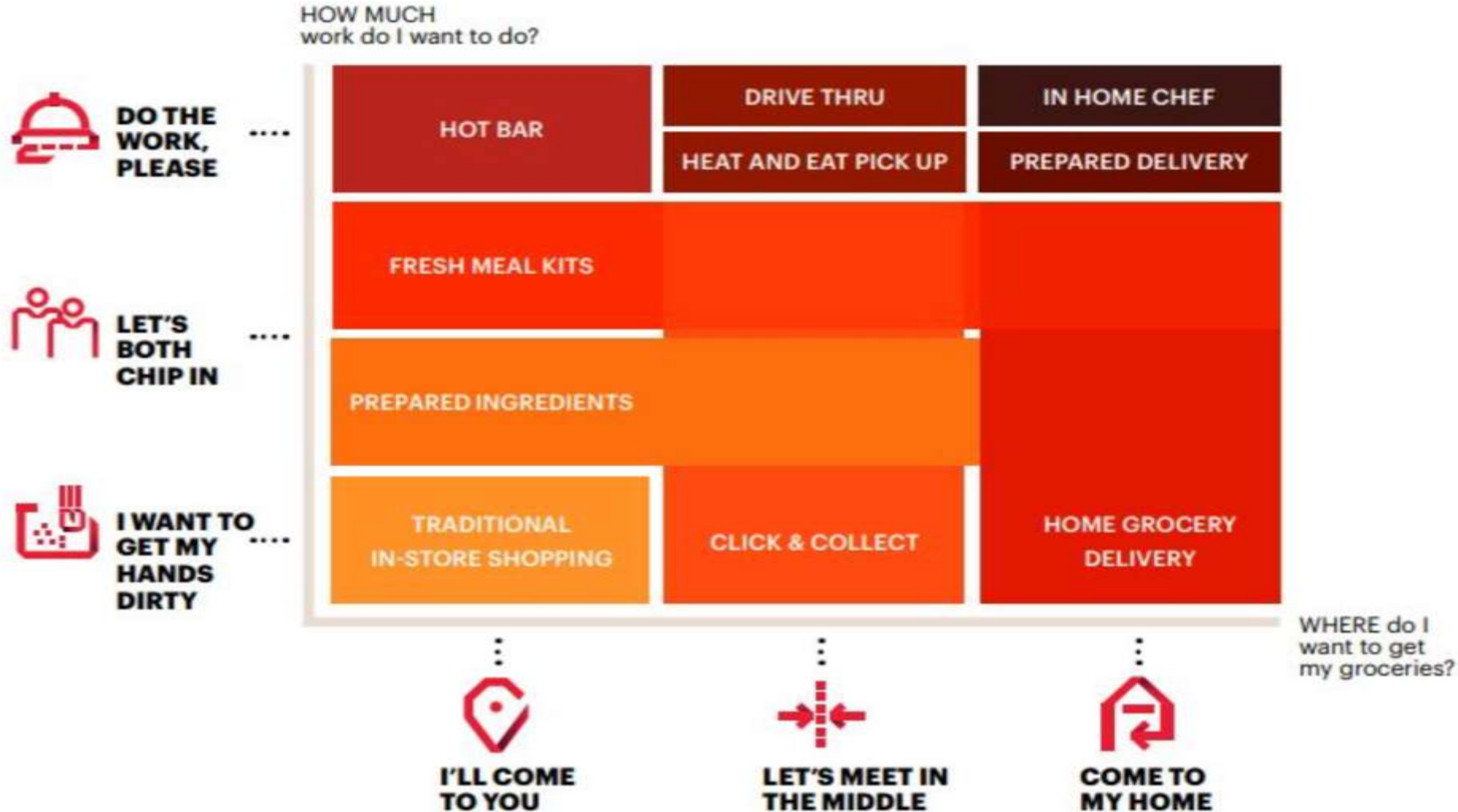
## UK grocery retail market – channel shares



What Can Stop (or even slow) the Inexorable Progress of Hard Discounters?

**WHAT IF YOUR CHOSEN FOOD  
PURVEYOR ASKED YOU EVERY DAY:**

**WHAT DO YOU WANT FOR DINNER?  
AND HOW DO YOU WANT IT?**



USA Supermarkets  
Woefully Late in  
Addressing Quality  
Food-2-Go.

For Years, More Like  
“School Dinners”!

Now, “Hurry Up Offense”!



**Alibaba's futuristic supermarket in China is way ahead of the US, with 30-minute deliveries and facial-recognition payment — and it shows where Amazon is likely to take Whole Foods**



盒马



**FRESHIPPO**

# Say hello to 7Fresh, JD.com's high-tech supermarket

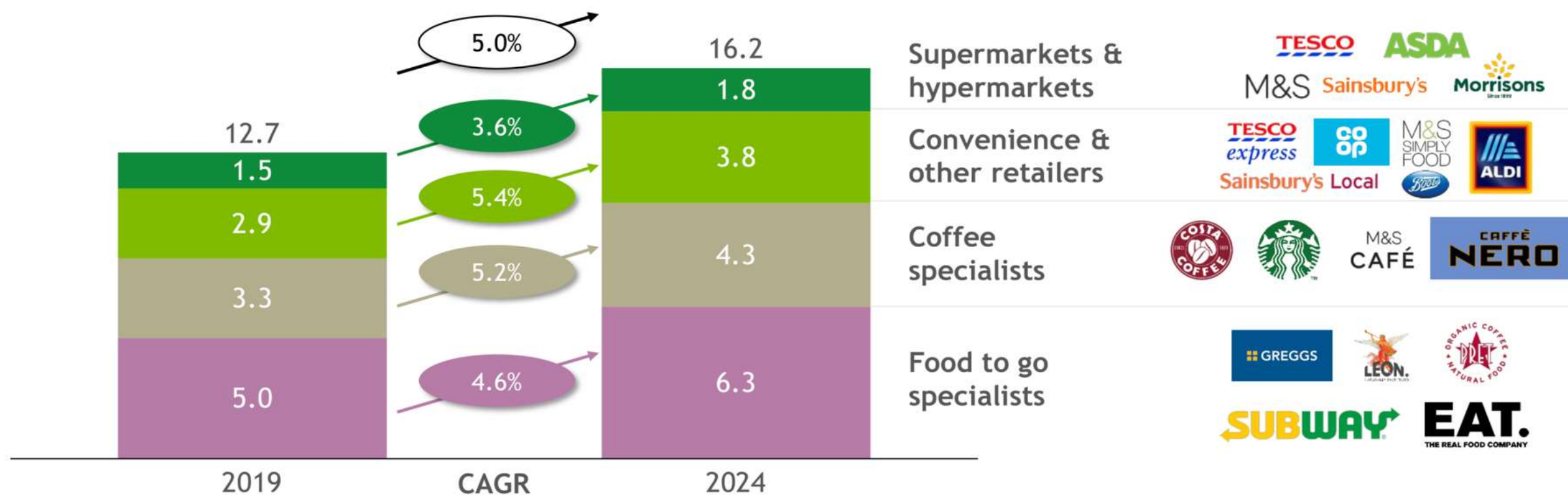




# FOOD TO GO MARKET – DIVERSE, ATTRACTIVE, GROWING



Food to Go market size, by channel: 2019-2024 (RSP, £bn)



Source: IGD UK Food-to-Go 2019, Market landscape and future growth outlook; excludes QSR channel where we have no presence currently



The Other Day, I was in an Outlet with a Huge Hot & Cold Beverage + Snack Offering







## Healthy Food Offer







## Asian and Western Food & Beverages







# Noodle Bar

# Noodle Bar

**\$28 Noodles in Soup** (Serves 2-3) ☐ Chicken ☐ Beef ☐ Pork ☐ Tofu ☐ Vegetarian ☐ Soft ☐ Firm ☐ Soft & Firm

<b>1 Noodle</b> (Choose One) <table border="0"> <tr> <td><input type="checkbox"/> Soft</td> <td><input type="checkbox"/> Soft &amp; Firm</td> </tr> <tr> <td><input type="checkbox"/> Firm</td> <td><input type="checkbox"/> Soft &amp; Firm (Hard)</td> </tr> </table>	<input type="checkbox"/> Soft	<input type="checkbox"/> Soft & Firm	<input type="checkbox"/> Firm	<input type="checkbox"/> Soft & Firm (Hard)	<b>2 Soup Base</b> (Choose One) <table border="0"> <tr> <td><input type="checkbox"/> Chicken Soup</td> <td><input type="checkbox"/> Beef Soup</td> </tr> <tr> <td><input type="checkbox"/> Pork Soup</td> <td><input type="checkbox"/> Tofu Soup</td> </tr> </table>	<input type="checkbox"/> Chicken Soup	<input type="checkbox"/> Beef Soup	<input type="checkbox"/> Pork Soup	<input type="checkbox"/> Tofu Soup
<input type="checkbox"/> Soft	<input type="checkbox"/> Soft & Firm								
<input type="checkbox"/> Firm	<input type="checkbox"/> Soft & Firm (Hard)								
<input type="checkbox"/> Chicken Soup	<input type="checkbox"/> Beef Soup								
<input type="checkbox"/> Pork Soup	<input type="checkbox"/> Tofu Soup								

## 3 Toppings (Choose One)

<b>Each Topping \$10</b> <ul style="list-style-type: none"> <li><input type="checkbox"/> Soft Boiled Egg (Hard)</li> <li><input type="checkbox"/> Soft Boiled Egg (Soft)</li> <li><input type="checkbox"/> Soft Boiled Egg (Hard)</li> <li><input type="checkbox"/> Soft Boiled Egg (Soft)</li> <li><input type="checkbox"/> Soft Boiled Egg (Hard)</li> <li><input type="checkbox"/> Soft Boiled Egg (Soft)</li> <li><input type="checkbox"/> Soft Boiled Egg (Hard)</li> <li><input type="checkbox"/> Soft Boiled Egg (Soft)</li> <li><input type="checkbox"/> Soft Boiled Egg (Hard)</li> <li><input type="checkbox"/> Soft Boiled Egg (Soft)</li> </ul>	<b>Each Topping \$8</b> <ul style="list-style-type: none"> <li><input type="checkbox"/> Soft Boiled Egg</li> <li><input type="checkbox"/> Soft Boiled Egg (Hard)</li> <li><input type="checkbox"/> Soft Boiled Egg (Soft)</li> <li><input type="checkbox"/> Soft Boiled Egg (Hard)</li> <li><input type="checkbox"/> Soft Boiled Egg (Soft)</li> <li><input type="checkbox"/> Soft Boiled Egg (Hard)</li> <li><input type="checkbox"/> Soft Boiled Egg (Soft)</li> <li><input type="checkbox"/> Soft Boiled Egg (Hard)</li> <li><input type="checkbox"/> Soft Boiled Egg (Soft)</li> <li><input type="checkbox"/> Soft Boiled Egg (Hard)</li> </ul>	<b>Each Topping \$5</b> <ul style="list-style-type: none"> <li><input type="checkbox"/> Soft Boiled Egg</li> <li><input type="checkbox"/> Soft Boiled Egg (Hard)</li> <li><input type="checkbox"/> Soft Boiled Egg (Soft)</li> <li><input type="checkbox"/> Soft Boiled Egg (Hard)</li> <li><input type="checkbox"/> Soft Boiled Egg (Soft)</li> <li><input type="checkbox"/> Soft Boiled Egg (Hard)</li> <li><input type="checkbox"/> Soft Boiled Egg (Soft)</li> <li><input type="checkbox"/> Soft Boiled Egg (Hard)</li> <li><input type="checkbox"/> Soft Boiled Egg (Soft)</li> <li><input type="checkbox"/> Soft Boiled Egg (Hard)</li> </ul>
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## Make it a Set 套餐

**+\$12 Drinks 飲品**

<input type="checkbox"/> Soft Drink	<input type="checkbox"/> Soft Drink	<input type="checkbox"/> Soft Drink	<input type="checkbox"/> Soft Drink	<input type="checkbox"/> Soft Drink	<input type="checkbox"/> Soft Drink	<input type="checkbox"/> Soft Drink	<input type="checkbox"/> Soft Drink	<input type="checkbox"/> Soft Drink	<input type="checkbox"/> Soft Drink
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Hong Kong







# 7-Eleven Serious Players In Filipino Food Service Market



## Star Products



Coffee



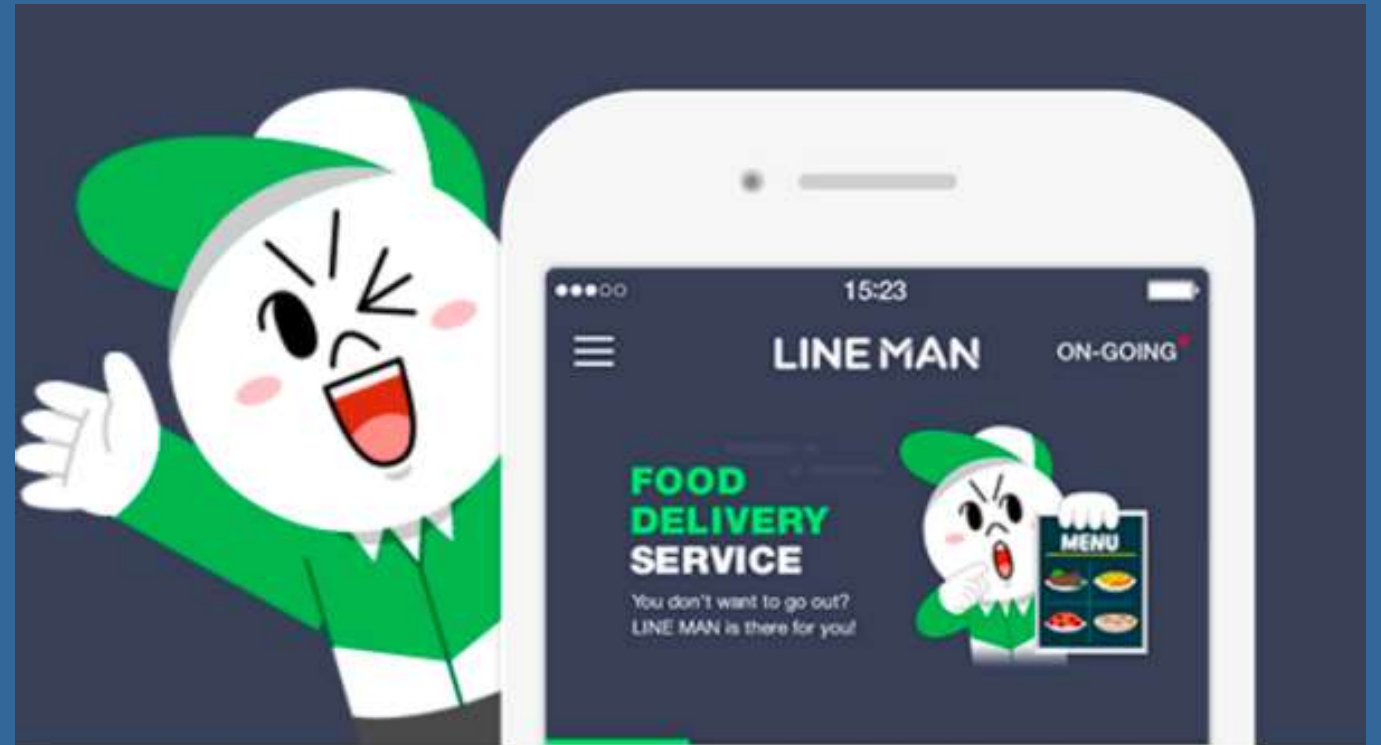
Fried Chicken



Rice Meals



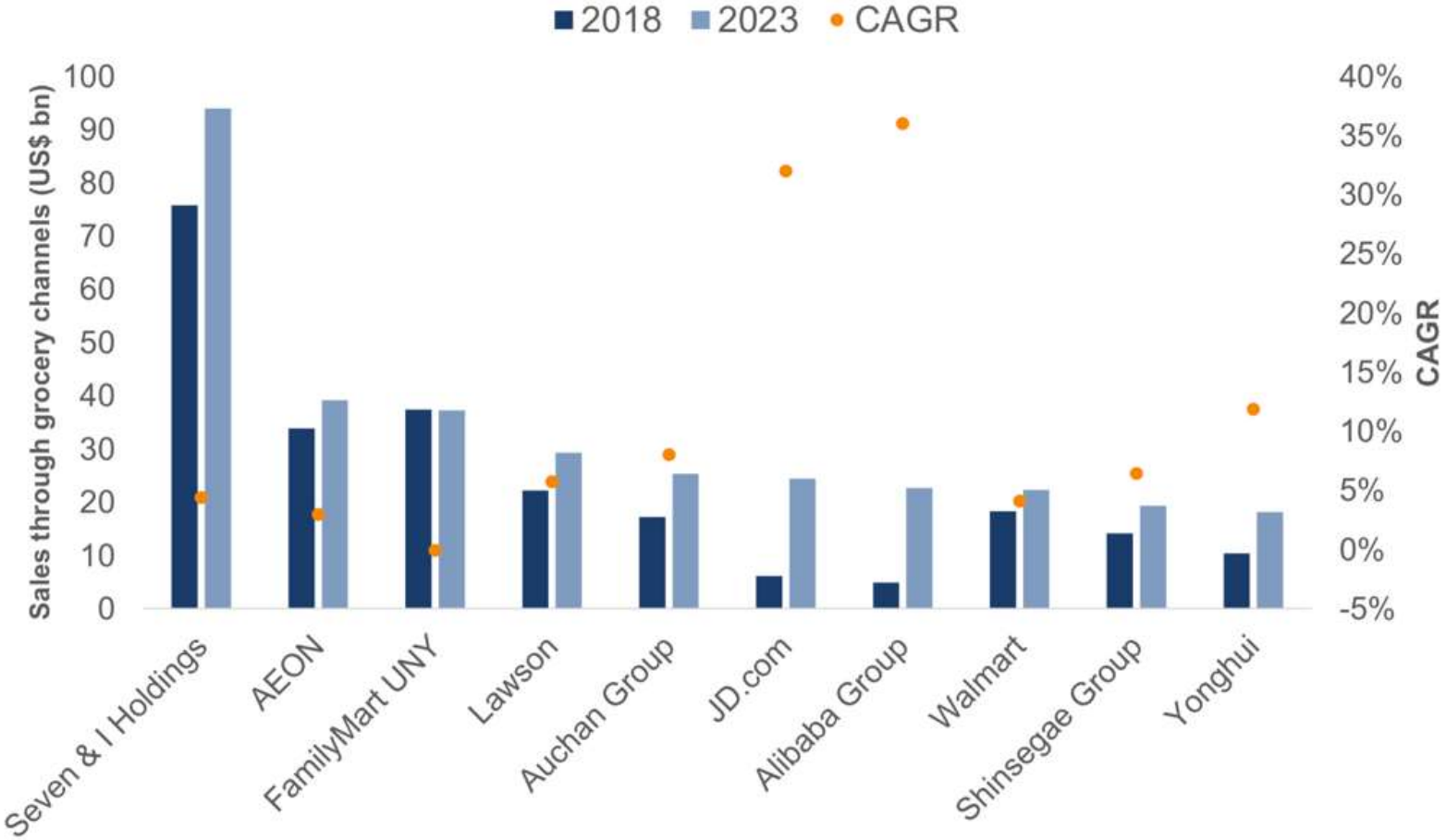
Mega-Asian Cities Have Chaotic Traffic: Motor Bike Delivery Services Are a “No Brainer” Even for a Snack Purchase from 7-Eleven!



LINE and 7-Eleven Thai Partnership



# Asia: Top 10 retailers 2018 and 2023





# Food-to-Go is a Huge Market in the UK Supermarkets are Important but Tertiary Players





# Pret a Manger 'to buy Eat' in vegetarian push

May 16<sup>th</sup>, 2019



**EAT.**



**PRET PANERA  
HOLDING COMPANY**

Pret a Manger is reportedly planning to buy rival Eat and turn the chain's 94 stores into vegetarian outlets.



Japanese-Style Menu  
Korean Entrepreneur  
London UK Locations





わさび  
**wasabi**  
sushi & bento

**Food Service and Food Retail Converging:  
Ready Meal Sold by Restaurant Chain Wasabi  
For Diners to Take Home (“Home Heat Eat”!)**







# Starbucks to Double Food Sales Globally by 2020



**“I’ll See You at Starbucks  
for Breakfast/Lunch/Snack”**

**Starbucks launches Uber Eats  
delivery in 100 Florida stores**



## Starbucks Embraces the Drive-Thru

Starbucks Corp. has a plan to push more lattes and egg wraps out the door. Via the window.

 [bloomberg.com](https://www.bloomberg.com)



# Starbucks is rolling out delivery across America with



July 24<sup>th</sup>, 2019





## Starbucks launches Mixato cocktail bar in Reserve Roastery Shanghai    October 25<sup>th</sup>, 2019

Starbucks has installed its new Bar Mixato in the Starbucks Reserve Roastery in Shanghai as a specialty coffee and craft cocktail venue.

A reinterpretation of the modern cafe and bar experience, Bar Mixato features a full bar menu including the global debut of 11 innovative coffee- and tea-based cocktails specially created for and available only at the Shanghai Roastery.



# PrimeNOW

HOSTING FRIENDS FOR THE BIG GAME?  
PARTY ESSENTIALS DELIVERED IN AN HOUR.\*  
Get \$10 off your first order  
with code **NEWTONOW**.

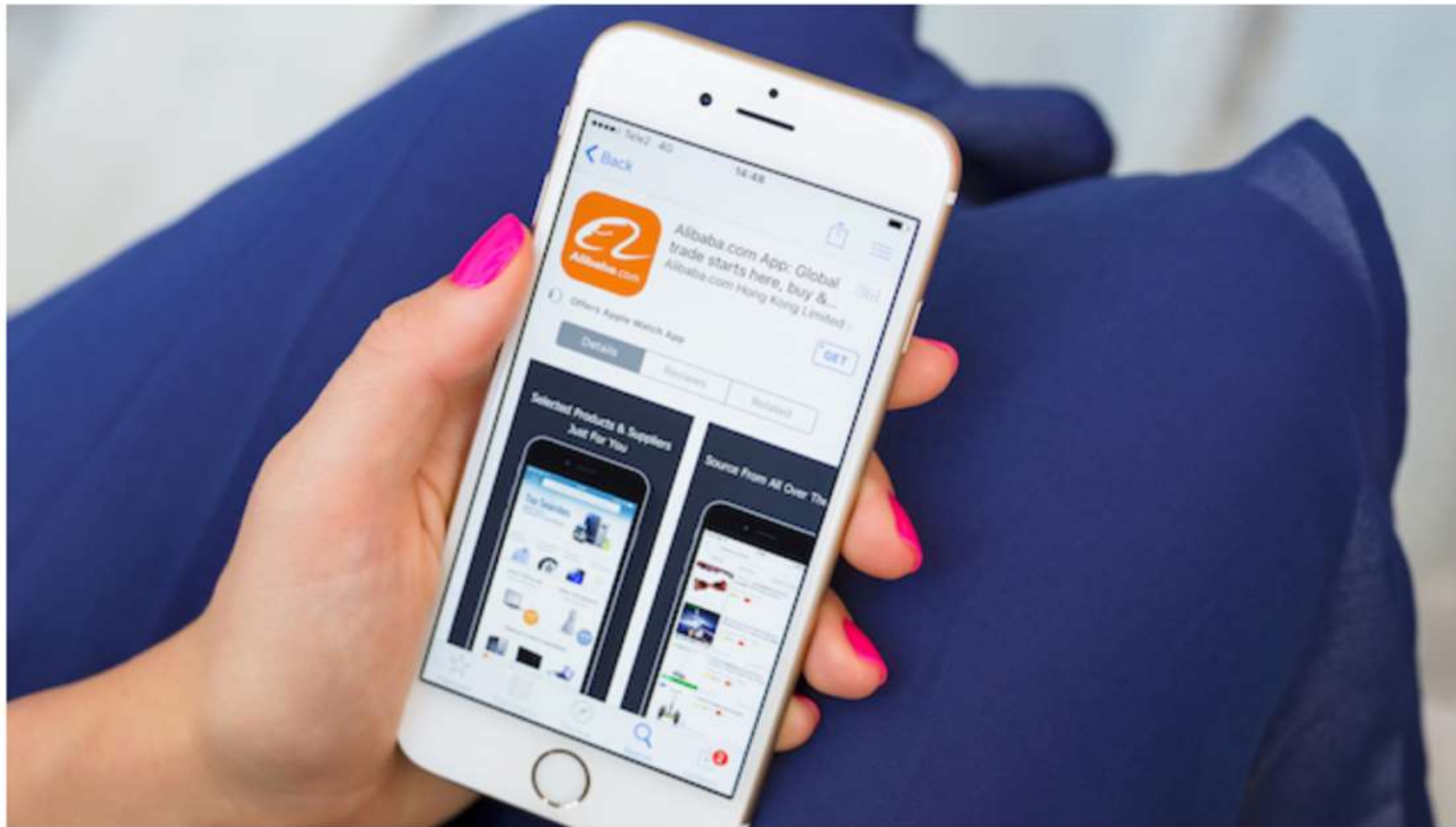


# Amazon leads \$575m investment round in Deliveroo

May 16<sup>th</sup>, 2019







# Alibaba Group eyes 1 billion users within five years

September 26<sup>th</sup>, 2019



## Food-Delivery Tycoon Adds \$2.4 Billion To Fortune By Beating Out Alibaba



Wang Xing, chairman, chief executive officer and co-founder of Meituan Dianping.(Photo by Anthony Kwan/Bloomberg) © 2018 BLOOMBERG FINANCE LP

In the battle for China's massive food-delivery market, Alibaba is in the unfamiliar position of falling behind its rival. The behemoth that's feeding more of the country's hundreds of millions of hungry customers is Meituan Dianping.



600 million registered users in 2019



# amazon go goes smaller



December 13<sup>th</sup>, 2018



Dr. Food @ProfDavidHughes

Amazon Go mini convenience store being trialled in USA (42 sq.m. 1/4 size of Tesco Express). Pop stuff into basket & pay automatically on exit with Amazon App. Products? NO ingredients just breakfast/lunch/dinner/snacks. This format will fit nicely into any apartment/office block.









# Ahold Delhaize pilots Amazon Go-style portable store

Checkout-free AH To Go outlet uses AiFi's NanoStore technology

September 24<sup>th</sup>, 2019

# BP partners with Uber Eats for home delivery trial

June 21<sup>st</sup>, 2019



The service, called Couchfood, is a partnership with Uber Eats and represents the next step in BP's push into convenience.





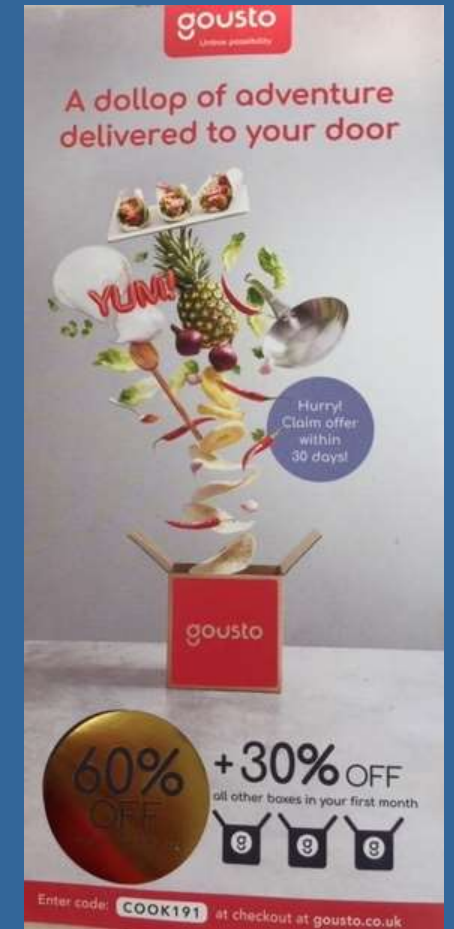
# Jamie Oliver is opening 500 deli counters at Shell garages across the UK

January 15<sup>th</sup>, 2019





The Recipe Kit/Box Market in the UK  
Tougher Nut to Crack than in the USA  
Because of Excellence of Chilled Ready  
Meal Offer in the UK



**Unilever again invests in meal-kit firm Gousto**

**January 9<sup>th</sup>, 2019**



# Unilever invests again in Sun Basket

May 22nd 2019



SUN BASKET

[Menu](#)

[Meal Plans](#)

[Values](#)

[Pricing](#)

[Sign In](#)

✓ Carb-Conscious

✓ Paleo

✓ Vegetarian

✓ Lean & Clean

✓ Gluten-Free

✓ Mediterranean

✓ Vegan

✓ Quick & Easy

✓ Pescatarian

✓ Diabetes-Friendly

[Explore Our Meal Plans](#)



# Feed the body, nourish the soul.

Healthy, delicious recipe boxes.  
Crafted by us. Cooked by you.

GET STARTED



## Leave the hard work to us

From just £4 per meal, our **food box** delivers everything  
you need to make delicious low-carb evening meals



### Pork escalope, parsnip fries & vinaigre...

For a light version of schnitzel, we toss pounded pork loin escalopes in polenta and herbs. The outdoor-reared, heritage meat has a complex, earthy flavour. Served with shoestring fries and a tangy salad.

🕒 30 mins

🔥 473 cals

© 8.00 pp





**Purple Carrot to Be Acquired by Largest Japanese Organic Food  
Delivery Service, Oisix ra daichi Inc., Fueling Opportunity to Bring Plant-  
Based Meal Kits Global**

May 25<sup>th</sup>, 2019



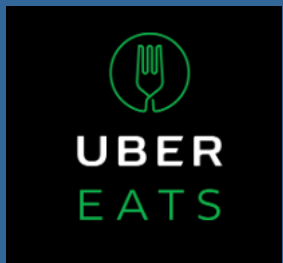
# Wegmans Joins Forces with DoorDash to Power Wegmans Meals 2GO Delivery, Announces Plans to Roll Out to 40 Stores This Year

April 29<sup>th</sup>, 2019

Wegmans and DoorDash Team Up to Accelerate Delivery of Wegmans' Restaurant-Quality Meals







# Metro joins with Uber Eats for meal delivery

April 11<sup>th</sup>, 2019

## Comparison of ready-to-cook meal delivery services

Companies such as Market GoodFood™, Cook it™, MissFresh™, Chefs Plate™ and HelloFresh™ that offer ready-to-cook meal delivery deliver at home all the ingredients and recipe cards needed for your chosen meals. Delivery is by box or bag with a chilled section allowing the ingredients to stay fresh during transport.

SEE THE COMPARISON





MARKS &  
SPENCER



## Around The Globe, Food Industry Folk Are Astonished at the Pricing Of “Meal Deals” in the UK



# WAITROSE

& PARTNERS

MYWAITROSE | GROCERIES | OFFERS



## £12 MEAL DEAL

STARTER OR DESSERT + MAIN + SIDE DISH + WINE, BEER OR CHOCOLATE



MARKS &  
SPENCER



# Danone VC Arm Buys into Farmer's Fridge Franchise Vending Business in USA





# Hillshire Farm expands vending options



**Tyson Foods, Inc.**





# GLOBAL ONLINE FOOD DELIVERY MARKET

**\$35bn**

Current total value

**20%**

Annual growth rate

**\$365bn**

Projected value by 2030

Source: UBS: Is the Kitchen Dead?

The younger generation are the most frequent consumers of food prepared outside the home with almost 3 in 10 under 30s ordering food delivery compared to just 6% of people aged over 60. When ordering, consumers use various methods to get their food delivered:

Ordering Method	18-29	30-59	60 years +
Food Delivery App	58%	31%	4%
Online Food Delivery Service Site	55%	33%	12%
Call Restaurant direct	42%	52%	37%
Order online direct restaurants website	40%	31%	12%
Don't use kinds of services	5%	12%	46%
Other	1%	1%	0%



# McDonald's expands delivery with Grubhub partnership

September 6<sup>th</sup>, 2019





# Aggregators with Dark Kitchens





# DoorDash launches shared ghost kitchen in Silicon Valley



October 14<sup>th</sup>, 2019

Today, the six-year-old San Francisco-based company is evolving again with the launch of DoorDash Kitchens, a rent-a-kitchen commissary designed for restaurants looking to expand their off-premise sales in the Silicon Valley without opening a physical restaurant in the pricey region.

## The start-ups building 'dark kitchens' for Uber Eats and Deliveroo

May 21<sup>st</sup>, 2019

Tech investors bet they can serve up the right food at the right place at the right time



Delivery services such as DoorDash, Deliveroo, Swiggy and Uber eats are using industrial kitchens to service orders © FT montage

# Shake Shack-Grubhub deal sealed by sharing of consumer data

August 5<sup>th</sup>, 2019



CEO Randy Garutti said it was a tough call to choose a national delivery partner after two years of testing. But Grubhub, one of the top two delivery operators in the U.S. by market share, offered the New York City-based brand a perk it couldn't refuse: access to consumer data.

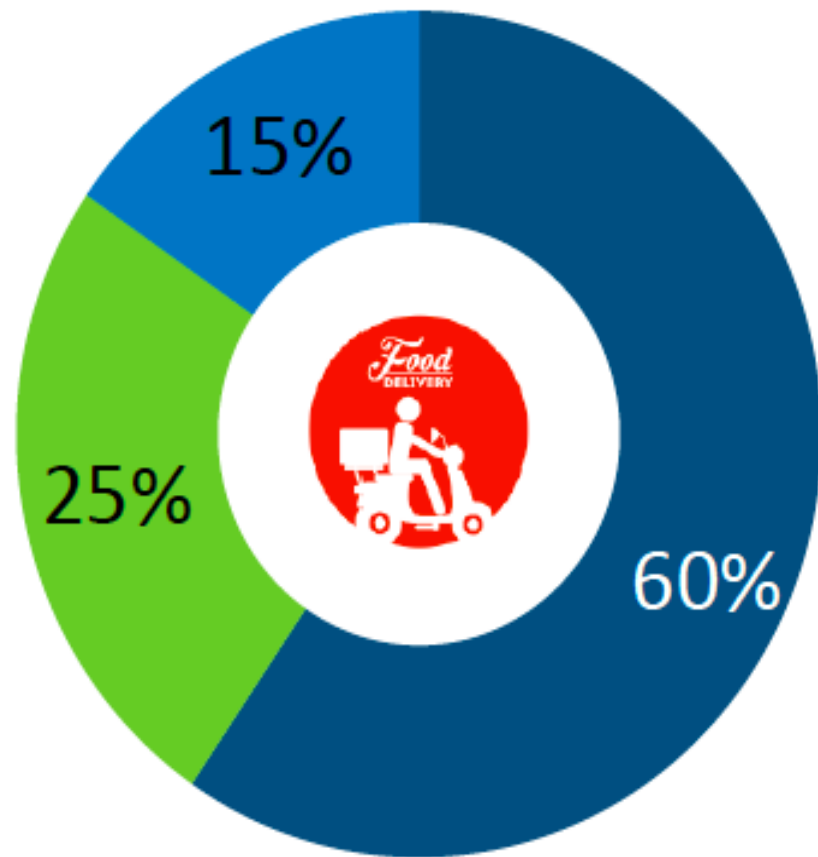


# Digital Ordering is not just for Delivery



Digital Solutions for Pickup or In-Store are Growth Drivers in the market

Visit Trends  
2019\* vs. 2018\*



Delivery

**+10%**



Click&Collect

**+18%**



In-Store  
Terminal

**+21%**

Source: The NPD Group/CREST® - BIG 5 EU,  
\*Year end June 2019 - Total Market

# Where to Find Biggest Threat to Global Meat Industry? Inside our Own Homes Aagghh!

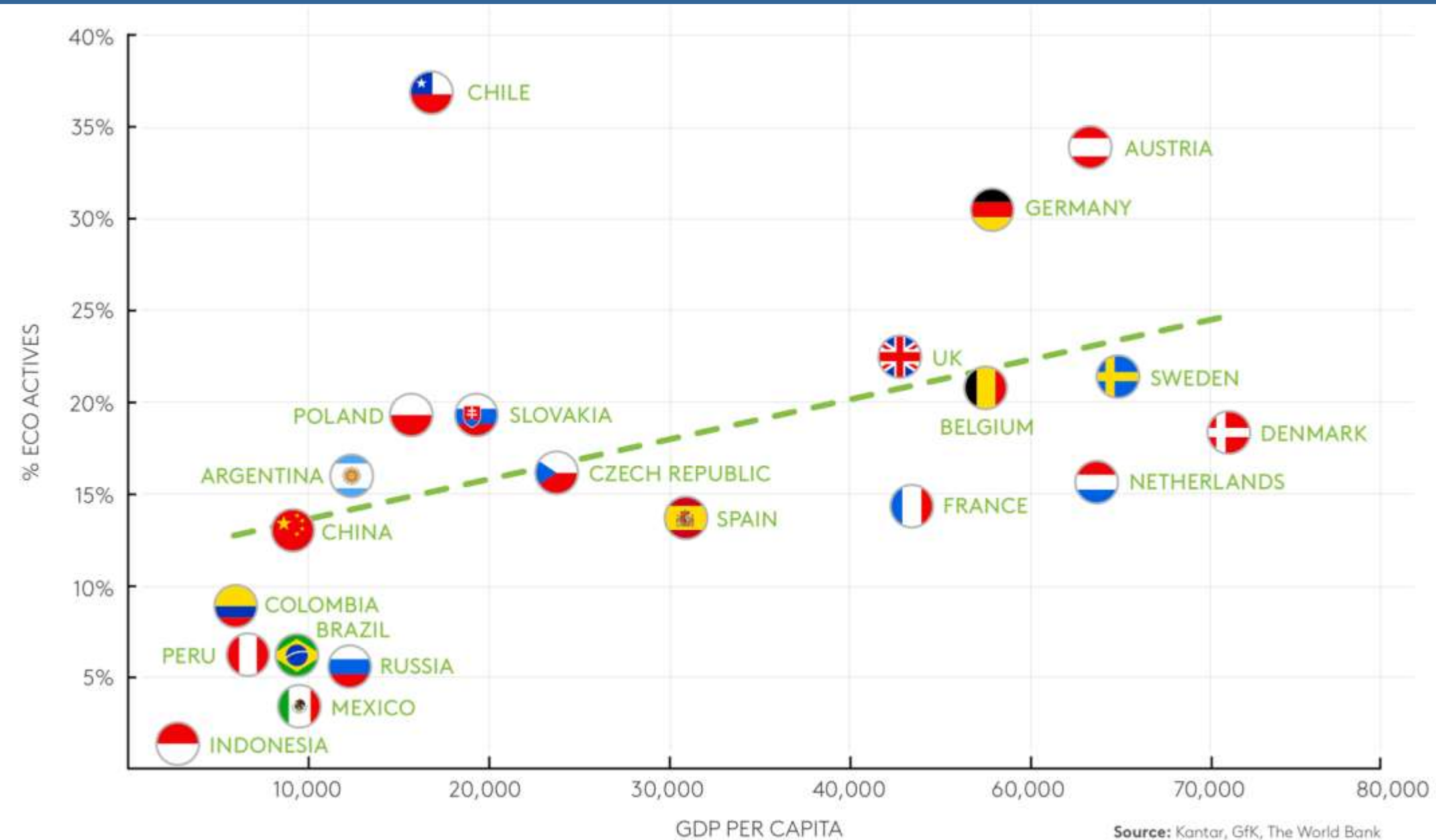
The Notion of “Climate-Friendly Diets”  
Is Gaining Substantial Traction. Just  
Ask Your Children/Grandchildren!







# The Link Between Eco-Active Consumers and Per Capita Income: “The Rich Can Afford to be Green”!







# SOY SCORECARD

Assessing the use of responsible soy  
in animal products

© WWF-Brazil / Sérgio Amador

CHECK THE SCORES

ANALYSIS

RECOMMENDATIONS

WHY A SCORECARD?

METHODOLOGY

## DO YOU REALLY KNOW WHAT'S BEHIND THE MEAT, EGGS AND CHEESE YOU EAT?

Most soy is grown in South America, where too often it comes at the expense of amazing natural ecosystems that are home to spectacular wildlife like jaguars and giant anteaters.

**Take action!**

for responsible soy

WWF has scored 133 companies on their use of responsible soy, grown without damaging the environment and harming people. The results show that many of these companies are doing far too little to protect irreplaceable habitats, wildlife, and people.

**Check out how  
companies scored**



## Social Pressures Dictating Choice Remind Me Again What We Can't Eat?:

- Anything with palm oil as an ingredient
- Chicken that's been fed soy from Brazil
- Cattle that's been shipped overseas
- Shrimps caught by slave labor in Asia
- Seafood that has despoiled mangrove forests
- Dairy products from intensive cow housing
- Milk from herds where calves taken from mums early
- Beef that has destroyed the Amazon
- Pork from hogs contained in stalls
- Anything with GMOs
- Anything in a non-recyclable pack
- ..... etc.



# FOOTPRINT SUSTAINABILITY TRENDS REPORT 2019

Foodservice's guide to a more sustainable future

- Sustainability – woven into the business
- Legislation driving industry action - e.g. sugar, plastics
- Sustainable diets - the notion of “climate-friendly”
- Waste not want not – 2<sup>nd</sup> nature to Boomers!
- Blockchain & others - traceability and transparency
- Ethical certification but streamline
- Active (not passive) customers
- Communicate about “the journey” (not greenwash)
- Fairness to employees – living wage, gender equality



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