



Global Foodservice

Trends and opportunities

Prepared for

Bord Bia
Irish Food Board

Today I Want to Discuss...

1

Top global trends changing
foodservice

2

How Ireland is responding to
global trends

3

Key Implications for the Irish
market

\$3.0T+

Global Foodservice
Industry Sales

5.6%

Annual Industry
Growth

Global Industry Trends



1. Capitalizing on Cafe Culture

Cafes Proliferate, Occasions Diversify

45%

Consumers visiting
weekly+

+9.9%

category sales growth



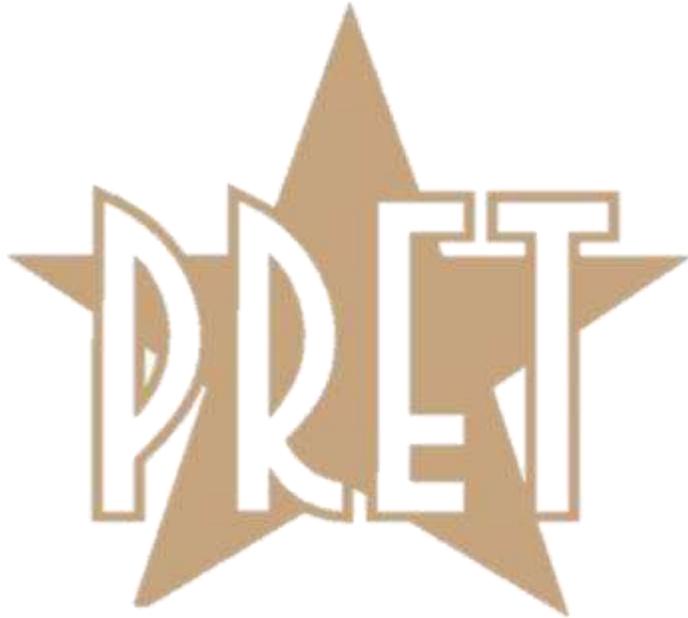
Cafes Help Consumers Connect

56% *“Visiting restaurants is a way to **socialize with friends and family.**”*



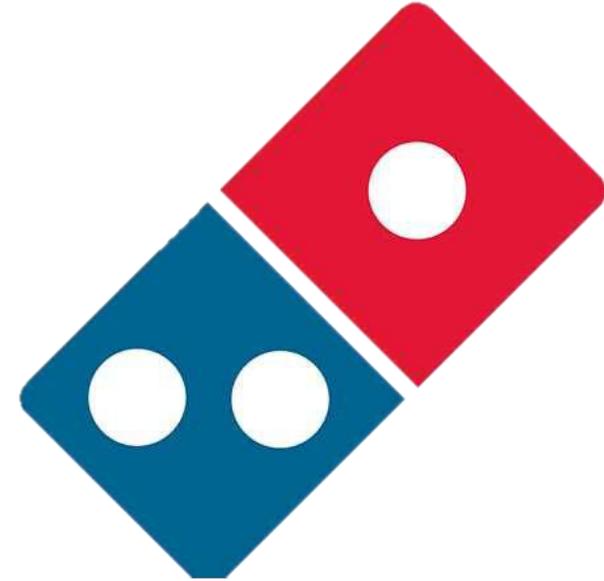
2. Off-Premise Proliferation

Chains Successfully Embrace Off-Premise



+15.2% sales growth

Urban grab-and-go concept



+9.8% sales growth

Tech-driven ordering & payment

Third-Party Delivery Proliferates Globally



GRUBHUB

JUST EAT

3. Rising Interest in Healthy Eating

Health Will Become a Differentiator

69% *“The availability of healthy options is very important when deciding where to go.”*

+57%
sales growth



4. Spread of Snacking

Craveable Snack Brands Seeing Growth

64% *“It’s very important that the snack I choose will **satisfy a craving**”*



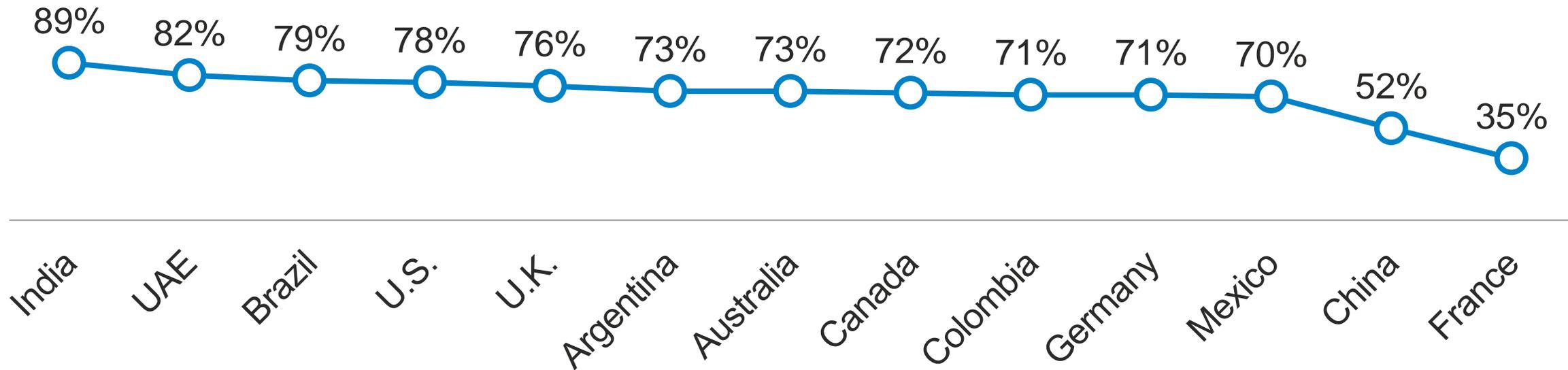
+6.8% sales growth
Craveworthy doughnuts



Across the Globe, Most Consumers Snack Daily

72%
Globally

% snacking daily+



Source: Technomic, Coca-Cola State of the Global Restaurant Industry

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Consumers Seek Healthier Snacks

37% are snacking
healthier, while just 6% are
snacking less healthfully

*“Compared to two years
ago, I’m now snacking
more healthfully.”*

Source: Technomic, Coca-Cola State of the Global
Restaurant Industry

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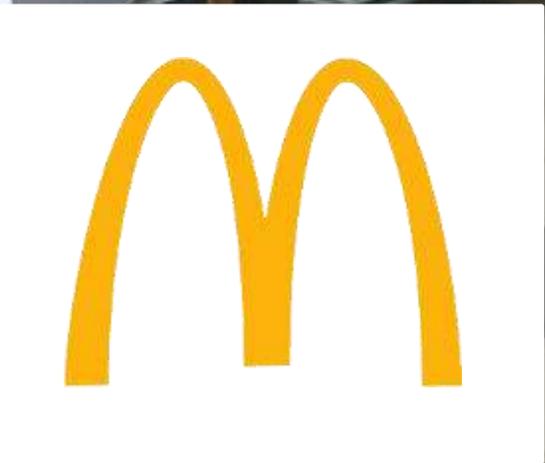


5. Make Tech Your Friend

Make Tech Your Friend

Consumers want a
**seamlessly-integrated
technology** experience





6. Make Ingredients The Hero

Make Ingredients the Hero

High-quality, fresh
ingredients consistently
the **#1 traffic driver**





7. Bend the Healthy Rules

Bend the “healthy” Rules

“Real” resonates
strongest as a “health
halo” term, among
74% of consumers





8. Make It Personal

Make it Personal

Consumers want to be able to **tailor their dining experience** to their own preferences



9. Be Authentic... For Real

Be Authentic, For Real

43% of consumers place
**strong emphasis on
authentic ingredients**





LOAM



Keys to Success

1

Learn your customers' value equation

2

Determine the strategies that align with your core brand identity

3

Be genuine in your approach and ensure a clear, consistent message

4

Don't try to be everything to everyone

Questions?



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