

Food-to-go: European innovators to learn from

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Partnerships in food-to-go

How and why food-to-go operators are using partnerships to grow their businesses and reach new markets



May 2018

© IGD 2018

Food-to-go shopper update

Q2 2018



Aug '18

© IGD 2018

TORONTO



SEATTLE



NEW YORK



AMSTERDAM



IGD safaris 2019 - see how trends are put into practice

IGD FOOD 18 -to-go

Wrap up 2018
with winning insights
in food-to-go

8 November
The Crystal, London
igd.com/foodtogo18



Consumers continue to evolve



Technology enabled



Experience focused



Vocal



Trust and ethics



Urbanised



Time poor



Diverse



Transparency



Health conscious



Savvy



Ageing



Authenticity

Yet fundamental needs don't change



VALUE

**Help me get
quality at fair
prices**



TIME

**Don't make me
spend more
time than I
want to**



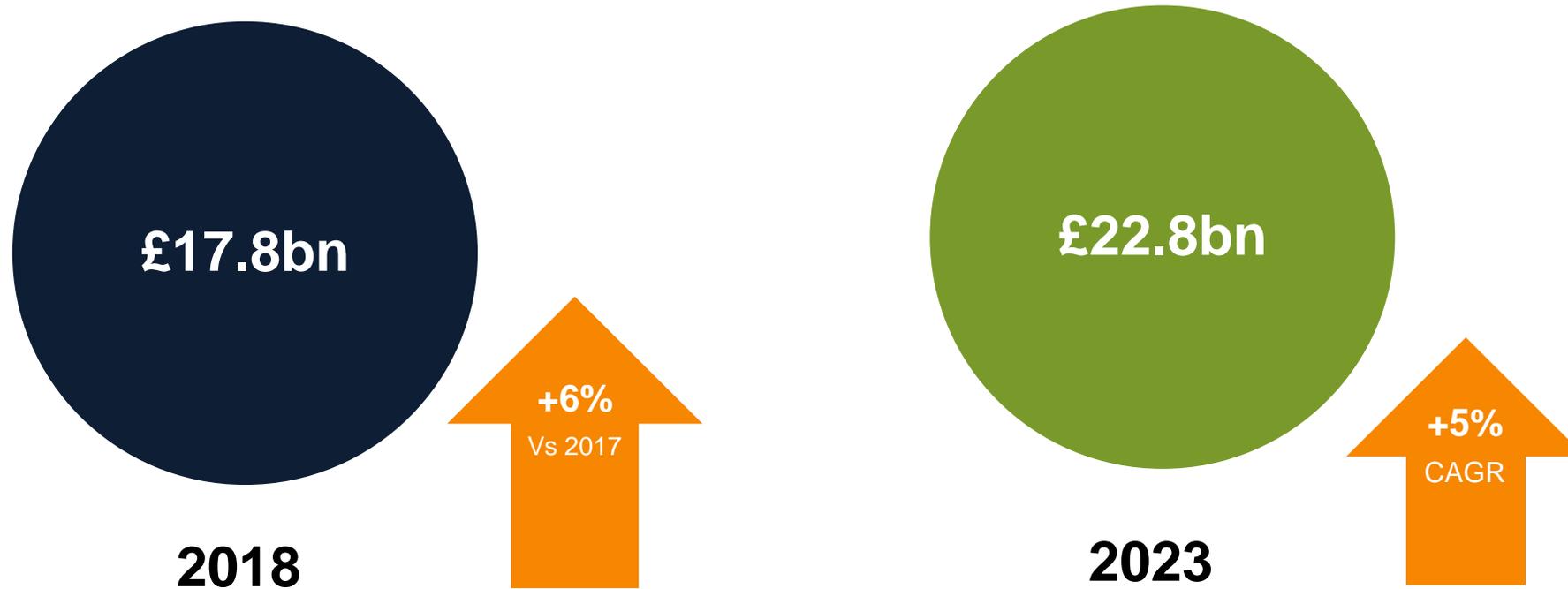
CHOICE

**Help me find
the products
I want to buy**

European food-to-go in context

- **A mixed economic outlook means opportunities for growth are not evenly distributed**
- **High street footfall is under pressure as purchases move online**
- **For retailers, large store regeneration is a focus – FTG opportunity?**
- **More space is being dedicated to health and wellness and free-from ranges**
- **Delivery is driving growth – but is it friend or foe?**
- **Ethics are rising up the agenda – from ‘do no harm’ to ‘do good’**

In the UK, despite competitive challenges, the food-to-go market remains in good shape



Key trends we're tracking in food-to-go





Health & wellness



AZTEC

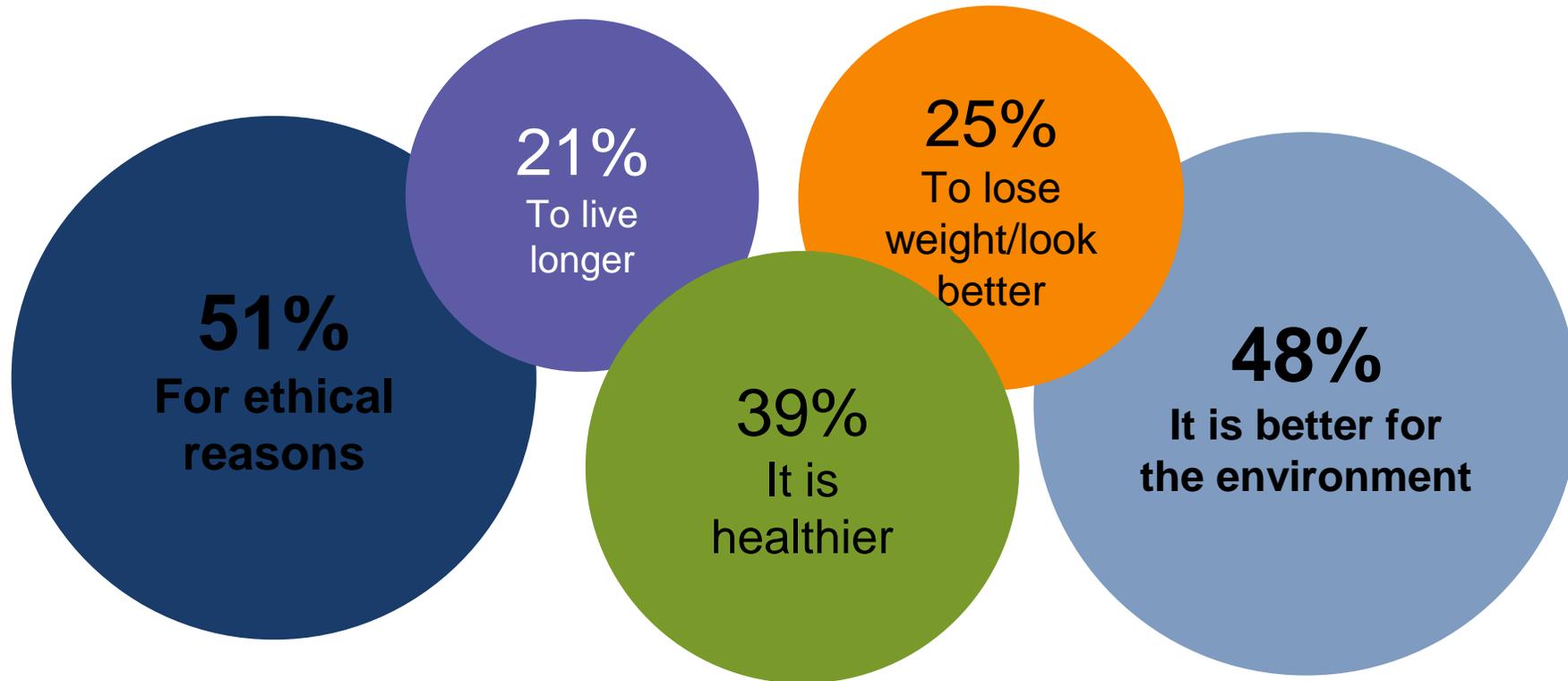
with non-GMO basil olive oil dressing. Sweet potato, corn and non-GMO mango salsa, spiced non-GMO black beans, guacamole, vegan sour cream, lettuce, beets, carrot, broccoli, organic sprouted mung beans, pumpkin seeds, organic blue corn chips

The rise and rise of health and wellness



Veganism: millennial fad or fact?

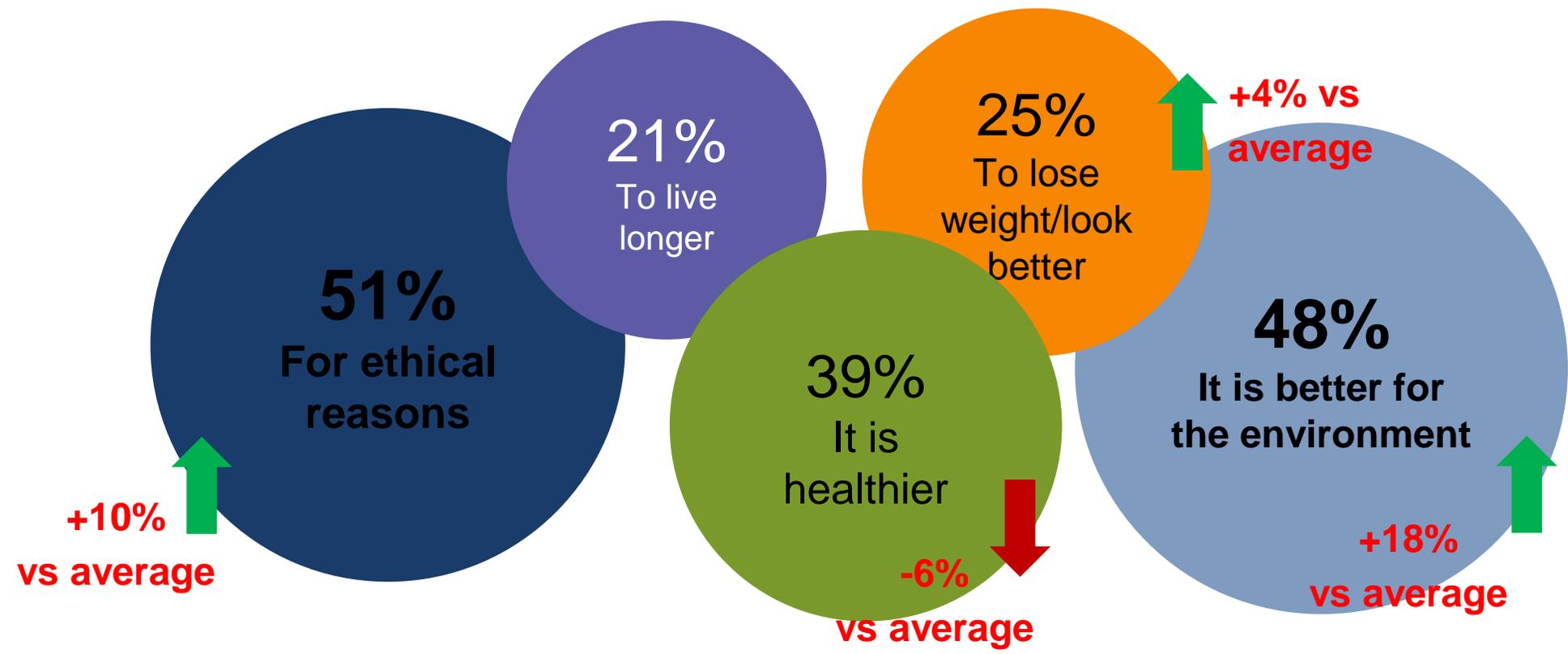
Top 5 reasons for following or considering following a vegan / vegetarian diet – all grocery shoppers





Veganism: millennial fad or fact?

Top 5 reasons for following or considering following a vegan diet **among 18-24s**





—
by CHLOE.



by CHLOE: US import, aiming to redefine fast-food



Copper Branch: 100% plant-based power food, coming to Europe 2019



Health gets personal



Great coffee means the world to us

50p OFF ANY HOT DRINK WITH A REUSABLE BOTTLE

Hey you! Please only take the napkins & cutlery you need

100% biodegradable cutlery

Put that bottle down!

Help yourself to a glass of our free filtered still or sparkling water, or pick up a Pure reusable bottle for £2.99

REUSE - REUSE - RECYCLE

gone for today!

Sorry this item is gone for today! We make our food here fresh throughout the day and sometimes our most popular items go much quicker than expected! Why not try something else or ask our team members for an item just as delicious?

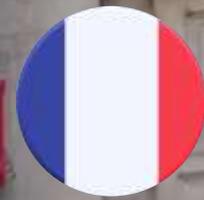
Pure.

Fast

Delicious

Natural

The power of fresh



franprix 

franprix  noé

Franprix noé

Ici, chaque client peut être sûr que les produits qu'il achète entrent dans le mouvement vers une consommation plus responsable.

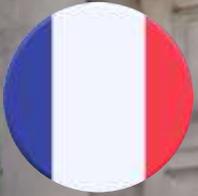
Nous privilégions le bio et l'équitable, mais pas seulement, nous sommes aussi ouverts aux produits non labellisés qui méritent la confiance pour leur qualité et leur origine.

Avant toute chose, nous défendons: le goût, le sain et la joie de vivre



Cultivées, mises en pot et livrées par la Ferme Horticole Théart (Ferme de Gally) à Saint-Nom-La-Bretèche (Yvelines)

Retailers are also targeting this trend



Retailers are also targeting this trend



Balancing
function and
emotion

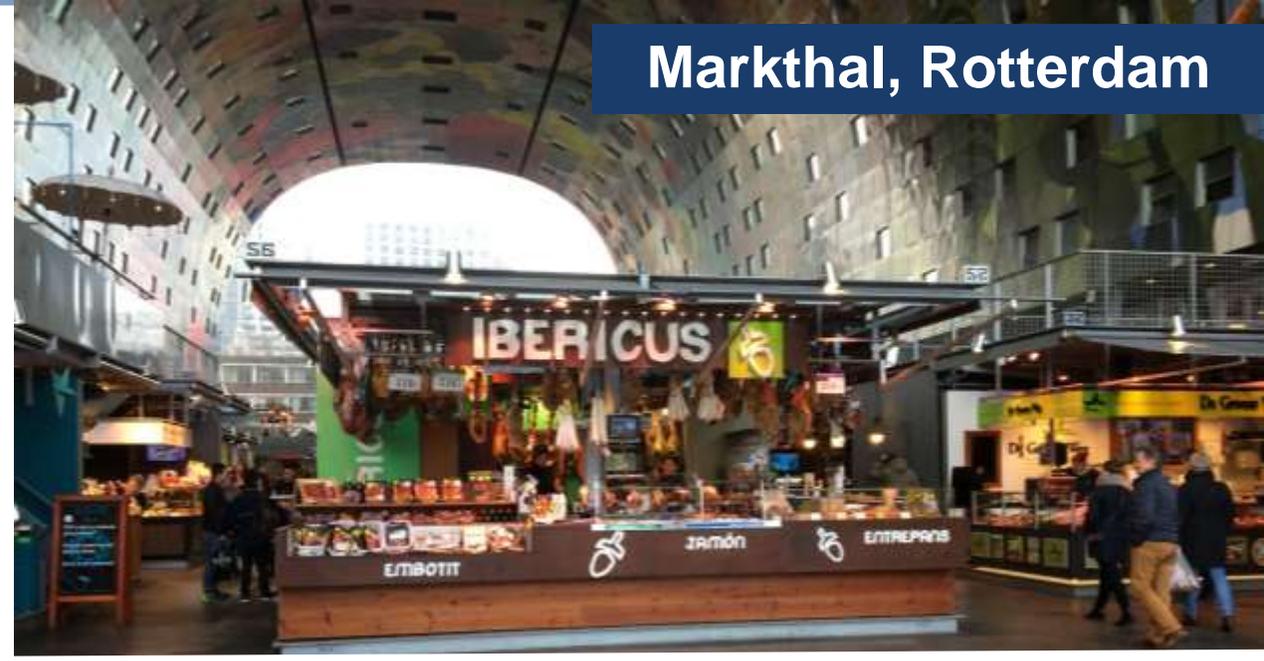


MARKET HALL FULHAM
JUST OPENED

Engaging environments, slick service



Eataly, Milan



Markthal, Rotterdam



Foodhallen, Amsterdam



Time Out Market, Lisbon

Where to be inspired by food markets and food halls

Time	Departures to:	Plat.	Comments
16:26	Sheffield	-	On time
	Sheffield (East Midlands Trains)		
16:57	Snerfield	-	On time
	Calling at: Leicester, Derby, Chesterfield & SHEFFELD. (East Midlands Trains)		
17:00	Corby	-	On time
	Calling at: Bedford, Wel...		



15:39:53

Sourced Market, London

Nottingham	16:14	1	On time	Nottingham	17:56	2	On time
Corby	16:27	3	On time	Sheffield	18:07	2	On time
Sheffield	16:32	4	On time	Nottingham	18:15	1	On time
Nottingham	16:56	2	On time	Corby	18:26	4	On time
Sheffield				Sheffield	18:36	3	On time



Food markets are inspiring food-to-go specialists...



Jumbo Foodmarkt, Utrecht



...and big retailers, too



Using counters to create theatre



Using counters to create theatre



Impactful use of colour, technology streamlines service



Tossed, London



Impactful use of colour, technology streamlines service



McDonalds, Innsbruck



Technology enables re-invention of the fast food experience



The growing
role of
partnerships



Stronger together



Food-to-go specialists + supermarket retailers



Food-to-go specialists + supermarket retailers



DEBENHAMS

Debenhams + Joe and the Juice, UK

JOE & THE JUICE



Food-to-go specialists + department stores



**BWG + SPAR +
Freshly Chopped,
Dublin**



FRESHLY
CHOPPED
THE HEALTHY FOOD COMPANY

OUR SIMPLE
PHILOSOPHY

SPAR

GREENS & CO
JUST GOOD FOOD

Food-to-go specialists + c-store retailers

Fresh Atelier (Delhaize) Brussels



Food-to-go specialists + c-store retailers



Food-to-go specialists + c-store retailers

Leon + HMS Host, London Heathrow



Leon + HMS Host, Amsterdam Schiphol

Food-to-go specialists + travel specialists

What can we learn?

Innovation is key – remember value, time and choice are still fundamental

Technology can help deliver personalisation efficiently

Expect fresh food-to-go and in-store counters to further increase in importance

Delivering great experiences can unlock growth potential across the market

Expect much more fusion between food-to-go, foodservice and retail as the food spaces of the future develop

New ways of working will be needed; more partnerships will emerge

Thank you for listening:

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