



**CEE TRADE FAIR
FOR RETAIL INVESTMENT**



ARE YOU REDI FOR A NEW EXPERIENCE CHAOS IN FOOD AND BEVERAGE

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1. Authenticity
2. Digital Revolution
3. Development of 'me' places
4. Growth of East
5. Growth of Food Halls
6. Leisure is the new 'place to eat'
7. The Future

But before we get into the trends...





MADE FROM PLANTS!



THE IMPOSSIBLE CHEESEBURGER

***noun* Disruption**

disturbance or problems which interrupt an event, activity, or process.

In F&B this is as much about product innovations as it is operator and cuisine changes.

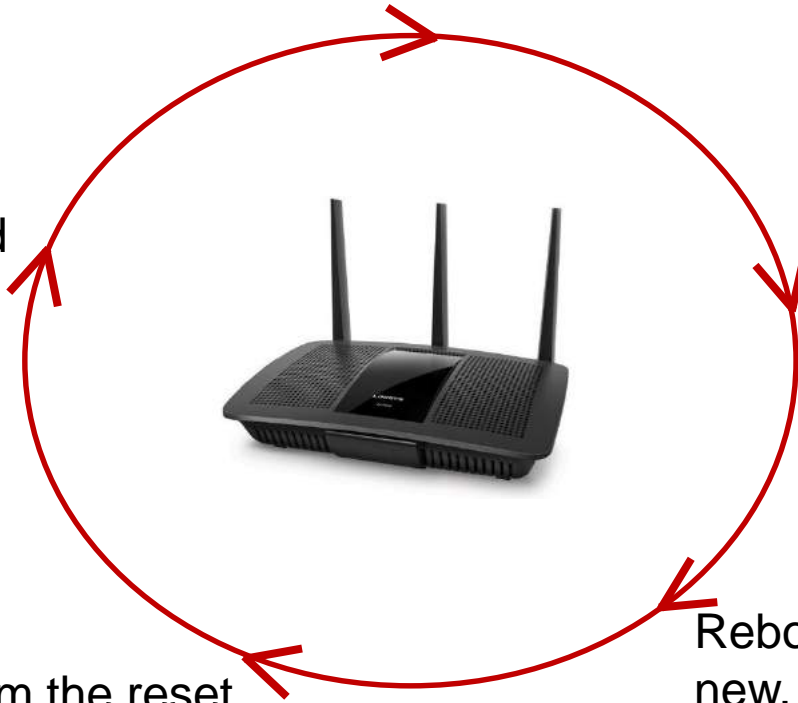
Experience is fine and normal

Over time, experience is stable but not exciting

Reboot and reset to bring new, faster experiences

Change is driven from the reset

Experience is enhanced



“Gourmetisation”

- Taking a basic product to the next level.
- Using great ingredients, serving it in a great environment.
- Charging a great price for it.
- Burgers are not a trend...
- But the way in which we eat them has created a trend.
- Hybrids, taking two basic products and combining them.



- Food in the next 5 years will continue down this road.
- Independent, Local and Branded.
- Not just about the food.
- Equipment, environments, image etc.
- Goes beyond the name and restaurant.
- Delves into the roots of the operation.
- 7% of people have swapped Fast Food for Fast Casual.

Source: Mintel





Bringing out the food and carving it in front of guests is one way that operators are creating a more authentic appeal to their units

UK – Burger Operators



McDonald's

UK – Burger Operators – Gourmet (Fast Casual)



Gourmet Burger Kitchen / Byron / Handmade Burger Co / Shake Shack

UK – Burger Operators – Urban



Almost Famous / MeatLiquor / Red's True BBQ / Red Dog Saloon

Across Europe



Big Fernand (France) / Hans im Gluck (Germany) / Bacoa (Spain) / Friends & Burgers (Finland)

- You can't eat online...
- ...But you can order it and get it delivered.
- JustEAT, Delivery Hero, Grub Hub exist in Poland.
- Delivery has had a positive impact for operators.
- Turnover increases of up to 30% for some.
- McDonald's are now trailing delivery service.
- If successful, will it mean the end for restaurants?



- Consumers are spending more on eating out.
- Generation Y – ‘Foodie Generation’.
- Connection and engagement with food.
- Willing to queue for hours for a great experience.
- Instantly share experience on social media.
- Trend towards becoming more social.
- 67% of people in Poland are ‘connected’.

61 % of millennials would rather have dinner at a new Restaurant, than buy a new pair of shoes.

44% have posted a photo of food or drinks they or someone else was having on social media.

52% would rather go to a food festival than music festival.

Online Takeaway Sales in Poland

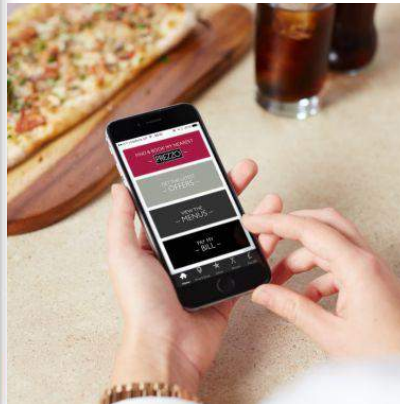
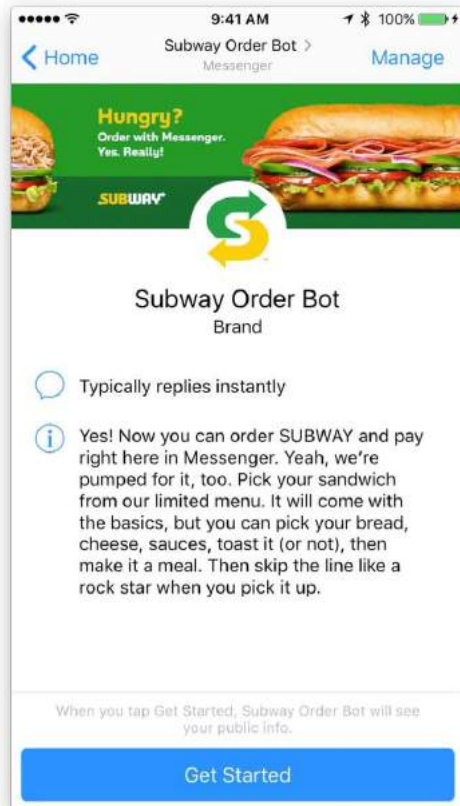


Source: Statista, October 2016



Is this the future for restaurants and fast food operators?

What will happen to their large restaurant units?



It is now easier than every to order, pre-order and pay for food on mobile devices.

Operators have taken advantage of apps and social media to connect with consumers.

Why bother speaking?



Restaurants and Cafes across the world responded positively to the 'Pokemon GO' craze.

Some operators saw a 30% increase in sales but promoting themselves as a sponsored 'PokeStop'.

Connecting with guests indirectly is still important.

- 'Me' is important.
- Guests want customisation.
- Guests decide what they want.
- Mostly 'anti-brand' operators.
- Increase in services combined with food.
- Tattoo/Burgers, Coffee/Barbers, Gym/Juice.
- Operators need to be flexible and allow for 'me'.



*“grande, caramel,
soy milk, double
latte, with an extra
shot, make it extra
hot an top it with
marshmallows”*





Starbucks in Amsterdam creates a 'homely' environment



Starbucks Reserve in Paris brings an element of artisan to it's stores



KFC introduces a new format across its stores to move away from 'cheap'

- In the past, inspiration has come from West.
- e.g. Burgers, fried chicken, big sandwiches.
- Inspiration will come from the East.
- Turkey, Thailand, Japan, Korea, China, Pacific.
- Food now includes Eastern influences.
- e.g. Spices, sauces, noodles – but ‘fast food’.
- 39% of Brits now eat Thai, whilst 17% eat Sushi.

Source: Guardian



- These figures are on the rise across Europe, as consumers become more adventurous.

Asian food is not new, but the influences it brings is impacting the way in which we eat food.

Spices are on the increase, whilst traditional serving methods are not so popular yet.





Wagamama are expanding heavily across Europe



Operators are focussing on new trends, like 'Bao' (Steamed buns)

- Spaces created specifically for foodservice.
- Old buildings, car parks, warehouses etc.
- Impacting typical high street restaurants.
- Allows for small operators to try something new.
- Greater places for social activity.
- Shopping Centres now want to do the same.
- Food Hall growth estimated to be 37% year on year.

Source: ICSC



*Food Halls give guests a real place to socialise, eat and buy...
...Restaurants do not.*





TimeOut Market, Lisbon



Eataly, Milan



Markthal, Rotterdam



Leisure is changing to 'create places for people' – increasing engagement and excitement to provide a reason for food and beverage experiences.



Bounce, London



Escape Rooms, Crystal Maze, Flowrider, Jump Nation



Technology will continue to shape the experiences throughout the foodservice market...For the better or the worse.



Experience will be key

“Experience per m²”



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THANK YOU

ANY QUESTIONS?

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