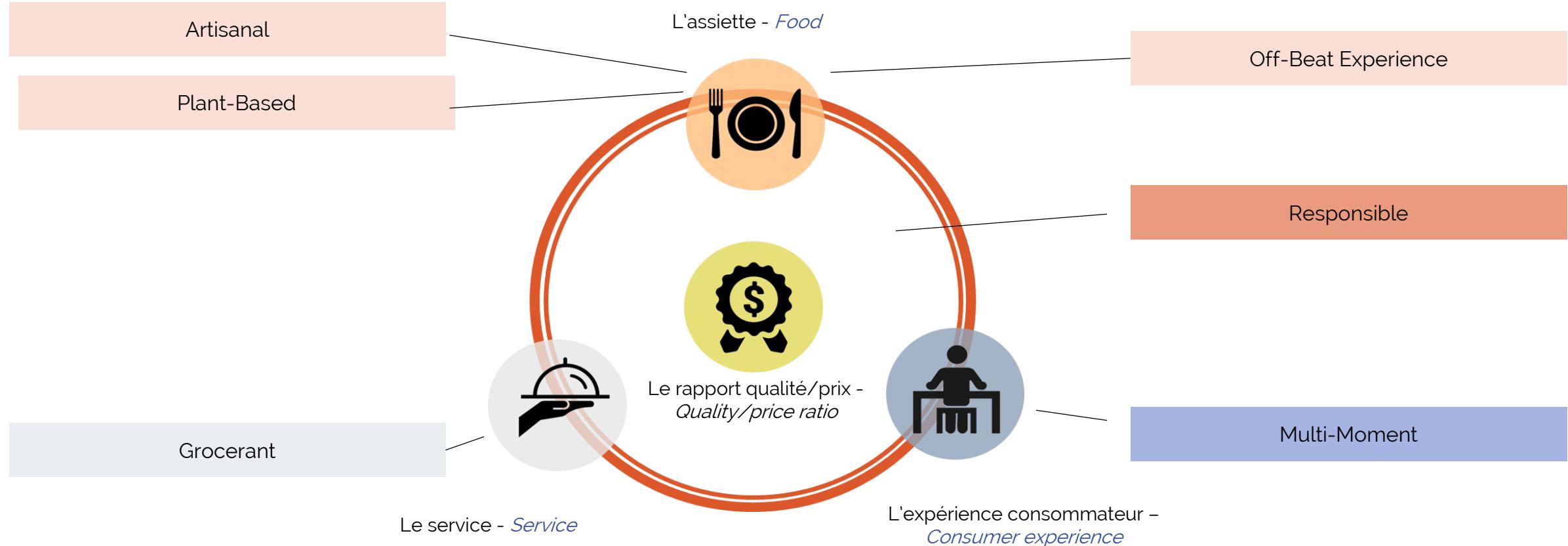




6 MAIN TRENDS IN FAST-CASUAL F&B

6 main trends in fast-casual F&B



Artisanal



"Artisanal food is a strong trend in F&B as it addresses key customer expectations: the desire for quality, transparency and authenticity."

- **Factors:**

After repeated food scandals, such as the 2013 horsemeat scandal and last year's egg contamination scandal, customers are expecting greater transparency from operators and are more open to consuming higher-quality products. New generations are also looking for less standardised products. *Artisanal food* is a way for operators to value quality and know-how.

- **Definition:**

This F&B trend encompasses everything from farm fresh to handmade. Operators highlight their know-how by preparing products on-site from raw ingredients and, most of the time, in full view of the customer.

- **Evidence:**

- Most of the food is prepared on-site, in open kitchens. Ingredients not prepared on-site usually come from small producers with a specialist, handcrafted approach.

Artisanal

PICTO SANDWICHERIE



Description: **Picto** is a Parisian brand with 3 PoS in the high street and a train station. They sell sandwiches handmade on the spot using seasonal and local products. Their supplier list is shared transparently as proof of product quality.

Delivery: The concept is about craft products, with the name itself referring to an original French tribe, the Pictones. Sandwiches are freshly made from carefully chosen, artisanal ingredients. The open kitchen allows customers to see their sandwiches being prepared.

NARCOFFEE ROASTERS



Description: **Narcoffee Roasters** is a Romanian coffee shop specialising in worldwide best-quality coffee freshly roasted on-site. They are looking to make high-quality coffee more popular and to break its elitist association.

Delivery: The concept is based on craft roasting, using beans harvested from accredited plantations in Africa, South America, Central America and the Caribbean.

Plant-based



"Customers and restaurateurs are becoming more concerned about the impact of the way they eat on their health and on animals; therefore they are changing their habits and going for greener options."

- **Factors:**

The emergence of this trend is caused by many factors: based on ethical (animal welfare, reduction of carbon footprint...) and economical reasons, and for health concerns.

- **Definition:**

Plant-based is an emerging trend related to the decrease in consumption of animal-based protein.

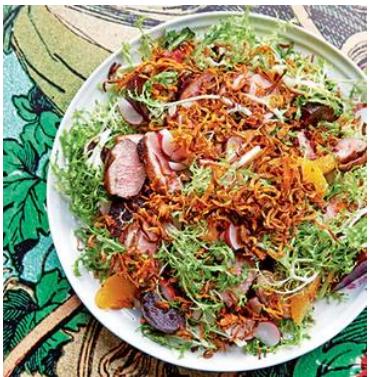
- **Evidence:**

In new concept openings, we see operators addressing this trend in different ways:

- Fully vegan/vegetarian concepts
- Standard concepts with vegetarian options

Plant-based

LEON



Description: **Leon** is a fast-food chain in the UK with over 45 stores in the high street, shopping centres and train stations. Inspired by flavours, variety and the natural healthiness of Mediterranean cooking, the menu includes wraps, salads, burgers, meat dishes and sides.

Delivery: Almost the entire menu is made up of vegetarian or vegan dishes, including gluten, dairy and nut-free options, and dishes good for pregnant women and for the digestive system.

THE BUTCHER'S DAUGHTER



Description: **The Butcher's Daughter** is a plant-based restaurant, café and juice bar with 5 PoS in the high street in the US. They offer a daily-changing menu, which is 100% vegetarian, and mostly vegan and gluten-free. They use seasonal ingredients.

Delivery: With the 100% vegetarian offer, the concept of The Butcher's Daughter defines itself as a 'vegetable slaughterhouse', using only vegetables and fruits.

Off-Beat Experience



"Dining out becomes an experience of discovering new cultures and being surprised by new tastes."

- **Factors:**

Consumers are more and more educated about foreign countries and food as they travel abroad more. In the meantime, chefs are being inspired by gastronomies from around the world as well as exporting their own know-how.

- **Definition:**

The trend for off-beat experiences is linked with the comeback of fusion cuisine in the restaurant industry. Operators are becoming increasingly more creative in mixing influences, ingredients and techniques in order to offer a unique and exciting food experience –whether gastronomic or fast casual.

- **Evidence:**

- Already popular in upscale restaurants, fusion food is now reaching the fast-casual segment.
- Operators are capitalising on the trend to launch seasonal menus.
- New concepts are emerging with a core offer inspired by 2 or more gastronomies.

Off-Beat Experience

SHISO BURGER



Description: Shiso Burger is a fast-casual concept with 5 PoS in the high street across Europe. It offers burgers with an Asian influence, such as buns made from rice flour, Wagyu beef, a signature Asian sauce and Korean 'twisted potatoes', all in an urban/manga-inspired setting.

Delivery: The concept is about combining the best of burgers and the taste of Asian food. This is communicated in the name itself: 'Shiso', a typical Japanese plant used in sushi and sashimi, and 'burger'.

STARBUCKS



Description: Starbucks is a famous coffee shop brand with 27,300 PoS in high streets, shopping centres, communication hubs and hotels around the world. They launched a 'sushi burrito' range this summer in the US, with the possible aim of extending the offer across their PoS.

Delivery: This new offer combines the Asian sushi/maki look and its core products (rice and algae) with a Mexican taste. As an example, one type of sushi burrito is made of shredded chicken, cucumber, pickled cabbage, onions, and avocado with tomatillo salsa.

Grocerant



"A mix between retail and restaurant, the grocerant trend combines the best of both worlds."

- **Factors:**

Many factors explain the emergence of this trend. The first is the opportunity for restaurant operators and retailers to diversify their services and so to increase revenues. Another is the demand from customers for greater transparency, as it is reassuring to see that the products used by the restaurateurs are of the same quality as the retailed products – and the other way around.

- **Definition:**

The grocerant trend takes the best of the grocery store and the restaurant: food prepared by the restaurant is also available for eating at home or for cooking. The boundaries between both industries are increasingly blurred.

- **Evidence:**

- Grocery stores have more and more shelf space devoted to snacks. They are also providing tables for on-site consumption.
- Several hybrid models have emerged: including wine shops with a dining offering, steakhouses becoming butcher's shops, restaurants with delicatessen products to take away.

Grocerant

PERSILLE



Description: Persillé is a French restaurant & butcher's shop, with 2 PoS, one in the high street and the other in a shopping centre. They offer 100% French meat used to prepare homemade dishes. You can also choose which pieces of meat you want in your dish from a cabinet.

Delivery: Both offers are available at the same location. Clients can either eat dishes prepared on-site or they can buy the meat to take home to cook.

ILLY CAFFE



Description: illy Caffè offers a coffee shop concept with 160 PoS in 34 countries around the world. There is a wide offering of coffee, and sweet and savoury snacks, and many products to take away: ground coffee, coffee cups, coffee machines...

Delivery: Each illy Caffè offers food and beverages to be consumed on-site, and also sells illy products to take home.

Multi-Moment



"Forget about the traditional 12-2pm/7-11pm opening times. Restaurants used to be places to eat. Now they have become places to live!"

- **Factors:**

Lifestyles are changing: mealtimes are less structured, people work further away from home and a new type of worker has emerged (freelancers, remote worker, etc.) This creates the need for multi-moment concepts: customers expect F&B to be available at all times and for restaurants to be spaces not only where they eat but also where they spend time.

- **Definition:**

Multi-moment restaurants are agile concepts addressing many, if not every, consumption occasion, from breakfast to dinner.

- **Evidence:**

- Many concepts develop a specific offer around coffee at breaktime and a different product for main meals, for example, burgers.

Multi-Moment

THE CHEESECAKE FACTORY



Description: The Cheesecake Factory is a global concept with more than 200 PoS in the high street and shopping centres, mainly in the US. The concept is: "If you want it, we have it." They offer a very wide selection of dishes from appetizers to desserts.

Delivery: The Cheesecake Factory provides dishes all day long for all appetites: appetizers, pizzas, salads, pastas, specialties, fish & seafood, steaks & chops, burgers, sandwiches, cheesecakes, desserts, and hot drinks and alcohols.

CA'PUCCINO



Description: Ca'puccino is an Italian coffee shop based in Italy, the UK and Dubai with 15 PoS in the high street, shopping centres and airports. 3 different offers are available: coffee shop, restaurant and pastries – each one promotes Italian culture and flavours.

Delivery: With their triple offer, Ca'puccino covers all moments of consumption: the morning with the coffee shop, lunch and dinner with the restaurant, and afternoon with the pastries.

Responsible



"Food wastage, ingredients sourced from far away and the use of plastic packaging were once considered inevitable in restaurants. Operators are now taking action to engage in responsible, sustainable ways."

- **Factors:**

Customers are becoming increasingly aware of the impact of their food on the planet.

- **Definition:**

The 'responsible' trend includes concepts or actions taken by the operator to reduce their impact on the environment.

- **Evidence:**

- Many operators are taking action to reduce plastic usage and in some cases incentivising customers to bring their own cups.
- By reducing carbon footprint, the farm-to-table movement is a way for operators to have a more positive impact on the environment
- Concepts emerge and then integrate waste reduction and a zero carbon footprint into their DNA. Operators integrate food tech solutions to reduce food wastage, for example: Too Good To Go, OptiMiam, Feedback.

Responsible

PEOPLES ORGANIC



Description: **Peoples Organic** is a local, organic 'gathering place' with 7 PoS in the high street, shopping centres and a university in the US. They offer healthy food and beverages using local and organic ingredients.

Delivery: Urban Farming teamed up with Peoples Organic to create a line of dark chocolate bars that are certified organic, vegan, fair trade and kosher, with part of the proceeds benefiting the work of Urban Farming.

VIDICI



Description: **Vidici** is a French fast-food chain with 4 PoS in the high street, and at a business school and train stations. They offer Italian food, including handmade pasta, and they import typical food products directly from Italy.

Delivery: Vidici is committed to zero food waste and has joined the zero-waste project, Too Good To Go. Before closing, customers buy unsold products via an app: for example, a €12 box of unsold fresh products for €3.



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