



BRIEFING

Trends, innovations and events shaping foodservice in the EAME region

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Going for it



Changes in the eating out culture is leading new players to enter the grab-and-go segment across Europe. Victoria Brownlee explores a market on the rise



Ever busier lifestyles and more time spent at work are transforming eating habits. The days of long weekday lunch breaks and sit down meals are no longer as commonplace across Europe as they once were. Now, diners are opting for faster and more affordable meal options, which are increasingly moving beyond lunch, and into all-day offerings.

And this style of dining isn't confined to office workers; with solo diners and people on the move taking advantage of the growing, and increasingly healthy, range of reasonably priced meals and snacks available to go.

The current scene in Europe

The food-to-go trend is already well established in the UK, with the sector making up one quarter of all eating out spending (worth £20bn), according to MCA. Contributing to the UK's continuing success in the 'to go' market is convenience, volume of sales and all-day grab-and-go offerings, including breakfast and quality coffee.

According to MCA Market Analysis Manager Peter Linden, the scene is "much more mature and advanced in the UK... One main [reason] is that in places like Germany, you have so many more canteens in companies, so people don't go out for food as much, and they also don't have the same kind of strong eating out culture that has really become established in the UK."

Continental Europe, where dining is often a time for catching up with colleagues and breaking up the workday, has been slower to embrace 'to go' dining. But, as global operators including Pret A Manger, Chipotle >

Mexican Grill and Five Guys move into countries like France, Germany and Spain, the scene is gaining momentum and operators are taking advantage of the growing demand for fast and convenient meal options.

Outside the UK, France is considered an emerging leader in food-to-go trends, as boutique outlets offering healthier alternatives begin to compete with established fast food operators.

According to foodservice consultant Gilles Castel FCSI, France's definition of takeaway food is changing. Where the sector was primarily dominated by known brands such as McDonald's, KFC and Domino's Pizza, France has "moved towards Good Food restoration, or Green Food restoration, with a panel of offerings that is simply extraordinary. France, which was very behind in the field, is now becoming a reference country."

Sector expansion and challenges

As well as smaller scale home-grown operators, global food-to-go brands are branching into Europe. For example, UK brand Pret A Manger has successfully opened 19 stores



in France, the majority of which are in or around Paris.

Clive Schlee, Pret's CEO, detailed some of the differences in catering to the UK and French markets on Pret's blog: "The idea of breakfast as a feel-good fuel stop between the commute and the office is not yet ingrained... Paris is dominated by plain croissants and espressos... We are trying to encourage them to enjoy the delicious porridge that sells in vast quantities at home but it's a struggle... The differences at lunchtime are also pronounced. The lingering memory of a long lunch clearly hangs over the Parisian psyche."

Another challenge for Pret in adapting to a different food culture has been the predilection for the French to eat in, with people ordering an average of 2.9 dishes, compared to London's average of 2.1 dishes per person. Dining in, rather than grabbing to go, is also more important for French diners, with less than 50% of Pret's sales taken to go in Paris, compared to London's 80%.

In supermarkets, the availability of grab-and-go salads and sandwiches is growing and the market is becoming more competitive. Monoprix, the French retail chain with over 600 stores in France, has evolved its entire supply of snacks across its three store zones – Monop'daily, bakery, and the self-service deli aisle – and is developing new items (with a 40% per year renewal rate) for seasonal collections to match healthy eating trends, in response to what it calls a "very dynamic global snacking market".

Monoprix understands that the French market is still relatively

Company Watch Nostrum

With over 100 stores in Spain and Andorra, Nostrum is a growing food-to-go giant, founded in 1999 in Barcelona. Recently expanding into France, Nostrum branches are located on high-traffic streets in top locations.

Nostrum offers customers a choice from over 100 dishes, with freshness, flavour and affordability considered top priorities; and time saving a key outcome: "We sell time. The time that the customer is saving by coming to Nostrum can be enjoyed in other leisure activities." Stores are set up with a showcase and sales space at the entrance, and a dining area at the back for customers choosing to dine in. For information about franchising see nostrum.eu

structured when it comes to lunch breaks, and that French diners are very attached to a complete lunch meal (entrée, main, dessert); 80% of Monoprix's sales of these items are carried out between midday and 2pm. In other European markets, purchases are less likely to follow the three-course meal structure, and are more likely to be spread out over the entire day.

Future growth

As lifestyles across Europe get busier and food-to-go offerings continue to become more enticing to consumers, the trend of to-go dining looks set to become more prevalent, particularly in capital cities.

To stand out in the growing market, operators will need to be innovative, offer something unique that remains approachable, and maximise on convenience to drive growth. In addition, an understanding of different dining cultures across European countries will allow operators to adjust their store set up and offerings if looking to expand. ■