

Food-to-go across Europe and beyond

Trends and operators to learn from

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The evolving food-to-go market

Latest trends & developments

Latest developments

Innovations we're seeing across Europe and North America

Future food formats

What will they need to deliver?

Experience



Guided study tours of the latest food-to-go formats

igd.com/retailsafaris

Interact



6 November
Tobacco Dock, London

igdlive.com

Learn



Insight on 400+ retailers
and 100+ markets

retailanalysis.igd.com

Our top food-to-go destinations

North America West Coast, Seattle & Vancouver

Visit for:

Better for you concepts
Better for the planet concepts
Tech innovation
Coffee!

North America East Coast, Toronto, Boston & New York

Visit for:

Great execution of best in class food-to-go in supermarkets

Ireland

Visit for:

Best in class food-to-go in convenience & forecourts

Norway

Visit for:

Best in class food-to-go hybrids and forecourts

London

Visit for:

Best in class food-to-go specialists

Netherlands

Visit for:

How big retailers are making the most of food-to-go

Paris:

Visit for:

Sustainable convenience/ food-to-go fusion

A robust(a) growth opportunity



2018



2023



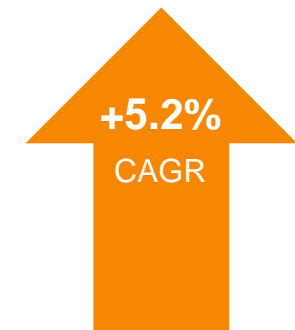
A robust(a) growth opportunity



2018



2022



Food-to-go is a great fit with evolving consumer preferences and lifestyles

VALUE



Help me save money

TIME



Help me save time

QUALITY



Help me get the best quality

EASE



Help make it easy for me

Food-to-go is attracting greater interest from retailers and restaurants alike



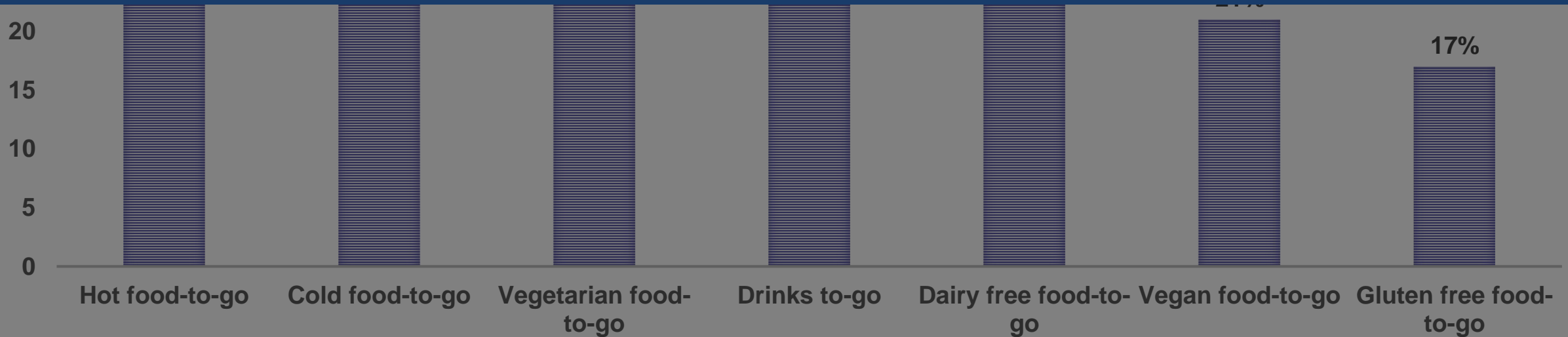
Food-to-go in context

- **Health & wellness + choice = opportunity**
- **Giving back is delivering more**
- **Hot growth opportunities abound**
- **New partnerships will be needed to differentiate**
- **Stores will need to drive deeper engagement – becoming more local and more relevant**
- **New places, new positioning and new food solutions**

What food-to-go consumers want more of:



Health & wellness + choice = opportunity





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 VEGAN SAUSAGE ROLL

 **GREGGS**

#VEGANSAUSAGEROLL



Become a
PART TIME VEGAN

Cook for the Carrot?

CHILLI SIN CARNE
AVOCADO TOAST
LEBANESE MEZZE


VEGAN CAULIFLOWER
BUTTERNUT COCONUT CURRY
ORGANIC LENTIL
AVOCADO SALAD



Giving back is delivering more



**doe mee. samen maken we
chocolade 100% slaafvrij**

kijk wat jij kunt doen om onze missie te steunen! 





Sustainably sourced ingredients by ingredient farm by farm

Sandwiches

Chicken Salad	\$12.99
Turkey Sandwich	\$12.99
Roasted Turkey Sandwich	\$12.99
Roasted Turkey & Avocado Sandwich	\$12.99
Roasted Turkey & Avocado Sandwich (V)	\$12.99
Roasted Turkey & Avocado Sandwich (GF)	\$12.99
Roasted Turkey & Avocado Sandwich (V, GF)	\$12.99
Roasted Turkey & Avocado Sandwich (V, GF, DF)	\$12.99
Roasted Turkey & Avocado Sandwich (V, GF, DF, LF)	\$12.99
Roasted Turkey & Avocado Sandwich (V, GF, DF, LF, NF)	\$12.99

Bowls

Super Bowl Bowl	\$12.99
Breakfast Bowl	\$12.99
Breakfast Bowl (V)	\$12.99
Breakfast Bowl (GF)	\$12.99
Breakfast Bowl (V, GF)	\$12.99
Breakfast Bowl (V, GF, DF)	\$12.99
Breakfast Bowl (V, GF, DF, LF)	\$12.99
Breakfast Bowl (V, GF, DF, LF, NF)	\$12.99

Rise & Shine

Heathful morning vibes & pasture-raised eggs

Two-Egg Eggs Benedict \$12.99
Breakfast Burrito \$12.99
Breakfast Burrito (V) \$12.99
Breakfast Burrito (GF) \$12.99
Breakfast Burrito (V, GF) \$12.99
Breakfast Burrito (V, GF, DF) \$12.99
Breakfast Burrito (V, GF, DF, LF) \$12.99
Breakfast Burrito (V, GF, DF, LF, NF) \$12.99

Breakfast

Two-Egg Eggs Benedict	\$12.99
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Breakfast Burrito (V, GF)	\$12.99
Breakfast Burrito (V, GF, DF)	\$12.99
Breakfast Burrito (V, GF, DF, LF)	\$12.99
Breakfast Burrito (V, GF, DF, LF, NF)	\$12.99

Summer

Summer Salad \$12.99
Summer Salad (V) \$12.99
Summer Salad (GF) \$12.99
Summer Salad (V, GF) \$12.99
Summer Salad (V, GF, DF) \$12.99
Summer Salad (V, GF, DF, LF) \$12.99
Summer Salad (V, GF, DF, LF, NF) \$12.99

order ahead, skip the line



OLYMPIA PROVISIONS
PORTLAND, OR

FISHMONGER

BUTCHER



OUR PROMISES

CELEBRATING and taking care of our staff so they can take care of you.

Being a good neighbor and **GIVING BACK** 10% of our profits.

CULTIVATING a thriving regional food economy.

HONORING our B Corp Certification every day, working to further social and **ENVIRONMENTAL PROGRESS**.







Hot growth opportunities abound

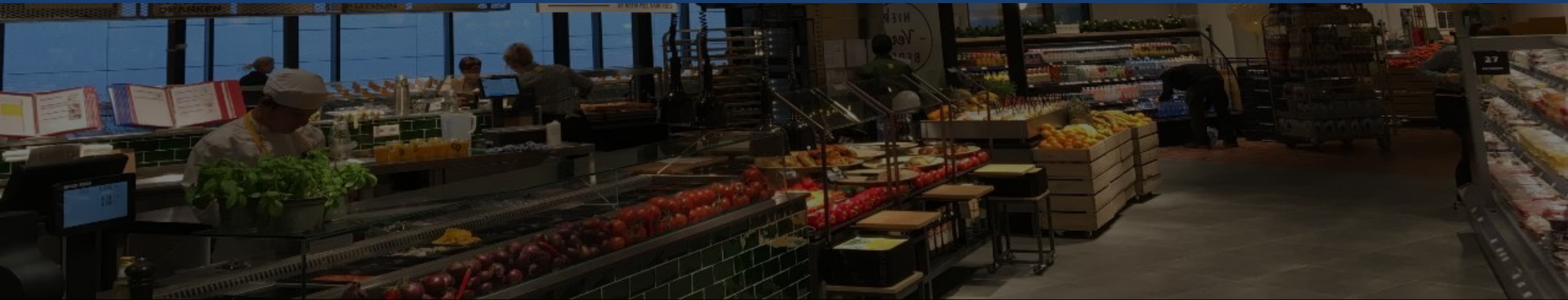


RISCH
SCHNITZ UND FRISCH





New partnerships will be needed to differentiate



Partnerships a strengthening trend







Stores will need to drive deeper engagement – becoming more local and more relevant

WE RUN 10K TOGETHER + HAVE A BEER AFTERWARDS, ON US.

KEEP FIT + DRINK BEER. IT'S A WIN WIN.

GET IN TOUCH TO JOIN OUR NEXT RUN.

JOIN BBRC WILLESDEN

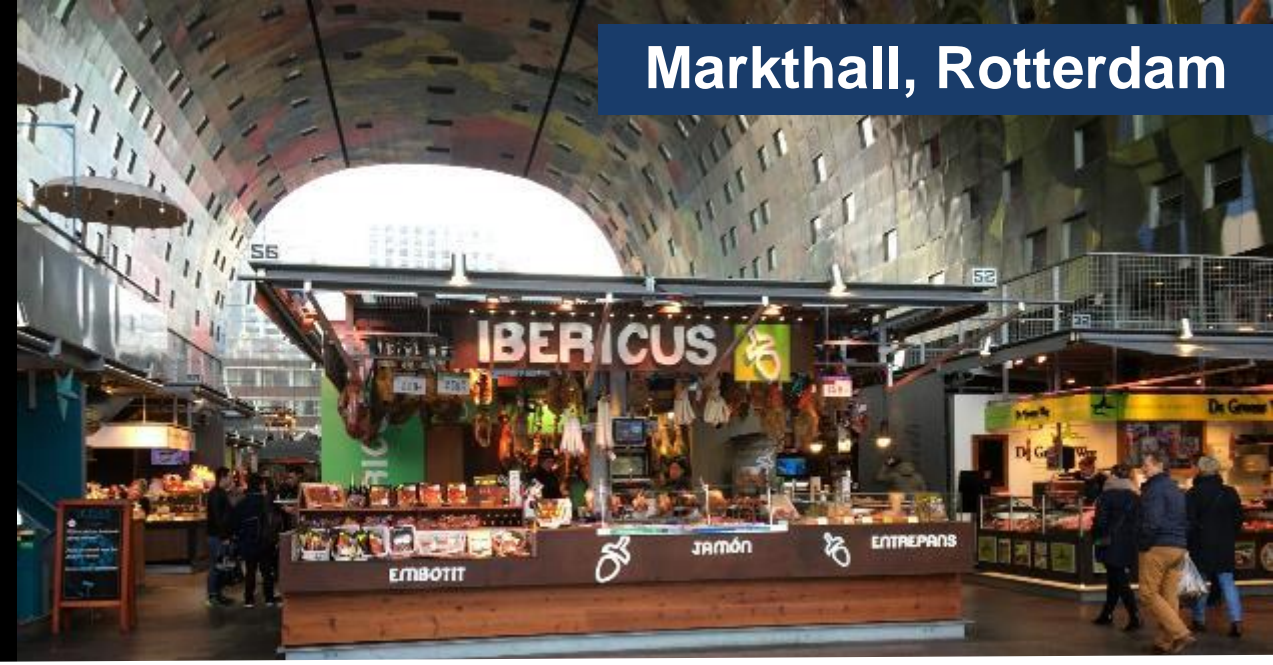
JOIN BBRC DALSTON

JOIN BBRC KING'S CROSS





Eataly, Milan



Markthall, Rotterdam



Foodhallen, Amsterdam



Time Out Market, Lisbon

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- **New places, new positioning and new food solutions**



New places, new positioning and new food solutions



**CENTRAL MARKET
HOUSTON, TX**

DOSATERIA

ORDER HERE

**WHOLE FOODS
MARKET,
CUPERTINO, CA**

START HERE STEP ONE	STEP TWO	INDIAN STREET FOOD
START HERE STEP ONE	STEP TWO	INDIAN STREET FOOD
START HERE STEP ONE	STEP TWO	INDIAN STREET FOOD

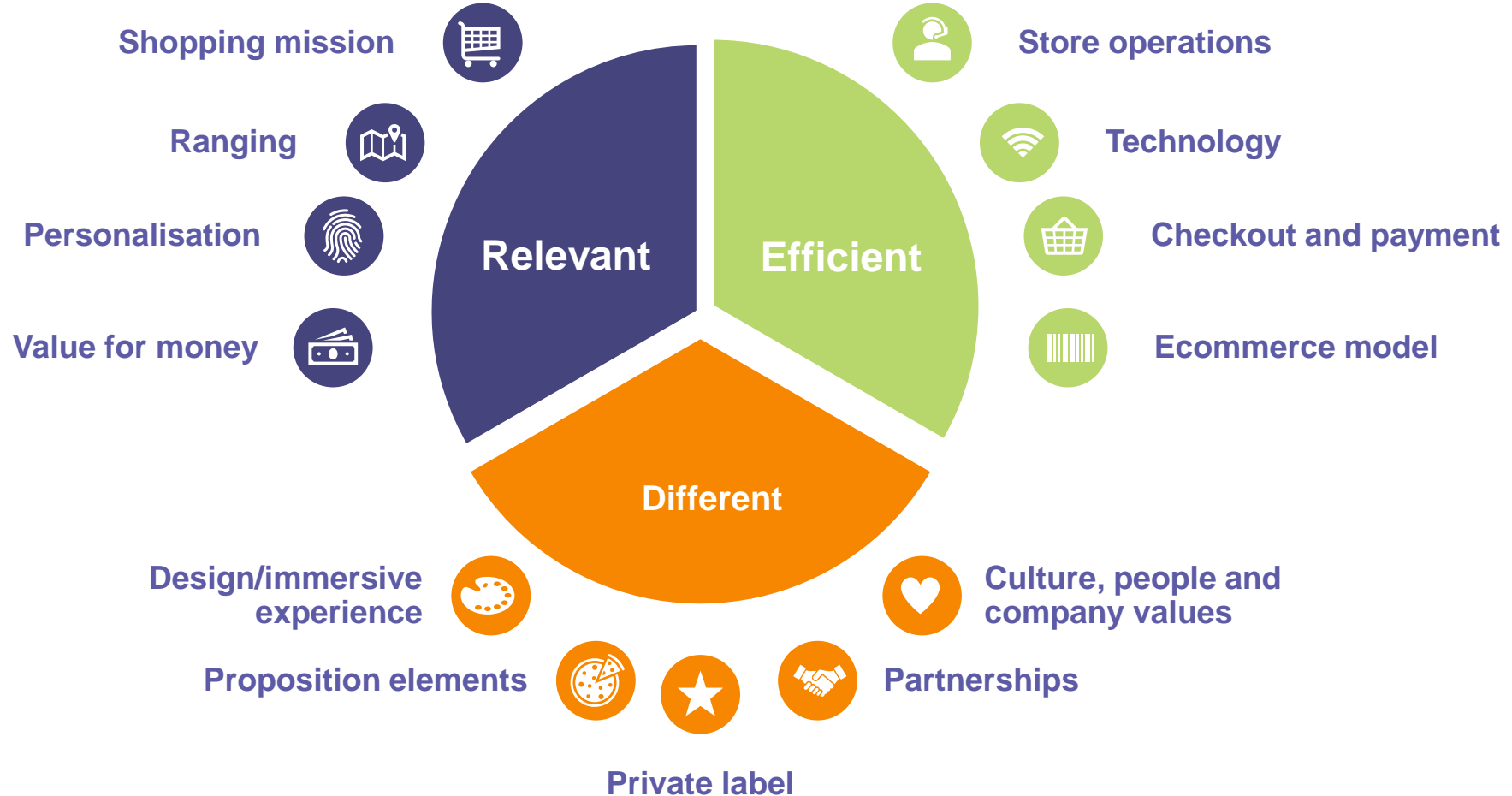
MADE
to our Standards
LUNCHEAT

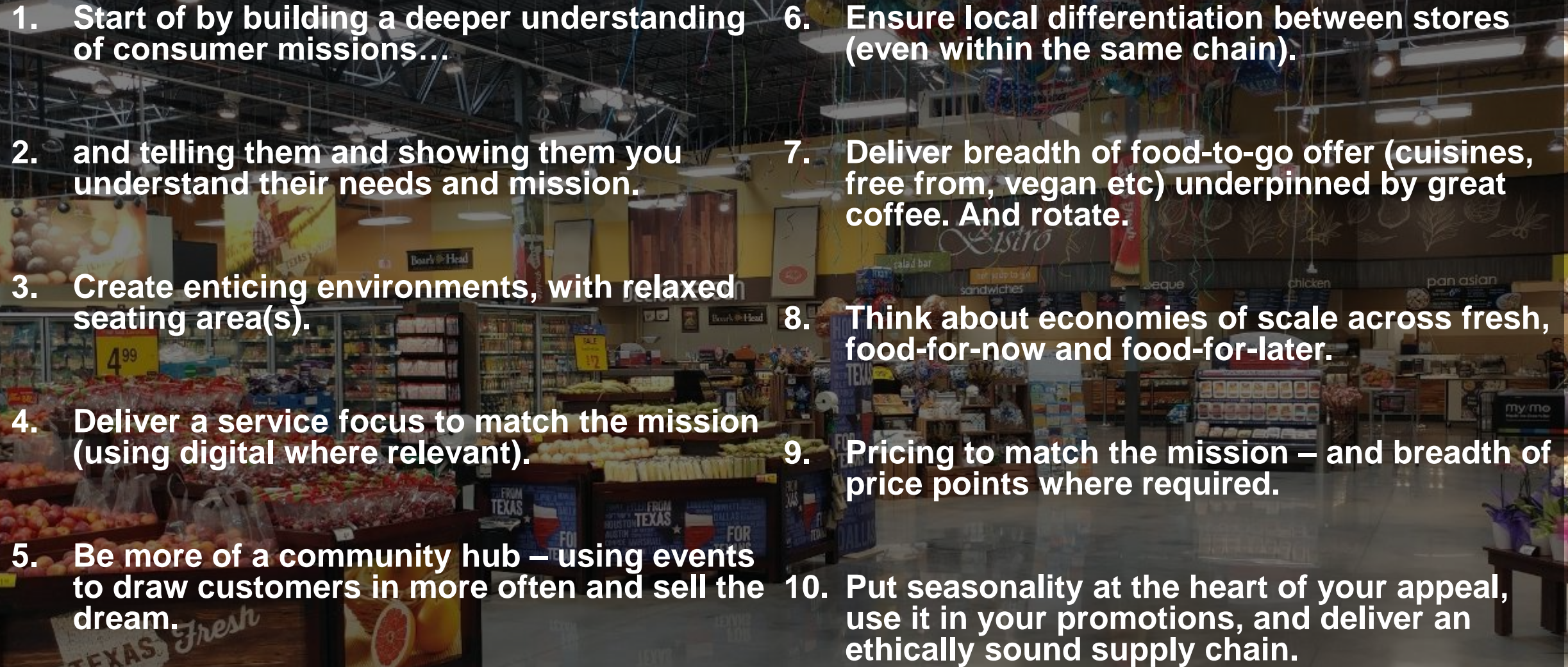
Gourmet Foods

Love Food. Great Quality

PARTY STARTERS

How do we believe stores will evolve to stand out?



- 
1. Start of by building a deeper understanding of consumer missions...
 2. and telling them and showing them you understand their needs and mission.
 3. Create enticing environments, with relaxed seating area(s).
 4. Deliver a service focus to match the mission (using digital where relevant).
 5. Be more of a community hub – using events to draw customers in more often and sell the dream.
 6. Ensure local differentiation between stores (even within the same chain).
 7. Deliver breadth of food-to-go offer (cuisines, free from, vegan etc) underpinned by great coffee. And rotate.
 8. Think about economies of scale across fresh, food-for-now and food-for-later.
 9. Pricing to match the mission – and breadth of price points where required.
 10. Put seasonality at the heart of your appeal, use it in your promotions, and deliver an ethically sound supply chain.

Thanks for listening!

Gavin Rothwell

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