



Veal and Foodservice

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GIRA FOODSERVICE

2006, November 8 & 9: Saint-Malo - France
4th International Veal Industry Symposium
"Veal and Foodservice"

The World OOH Market - 2005

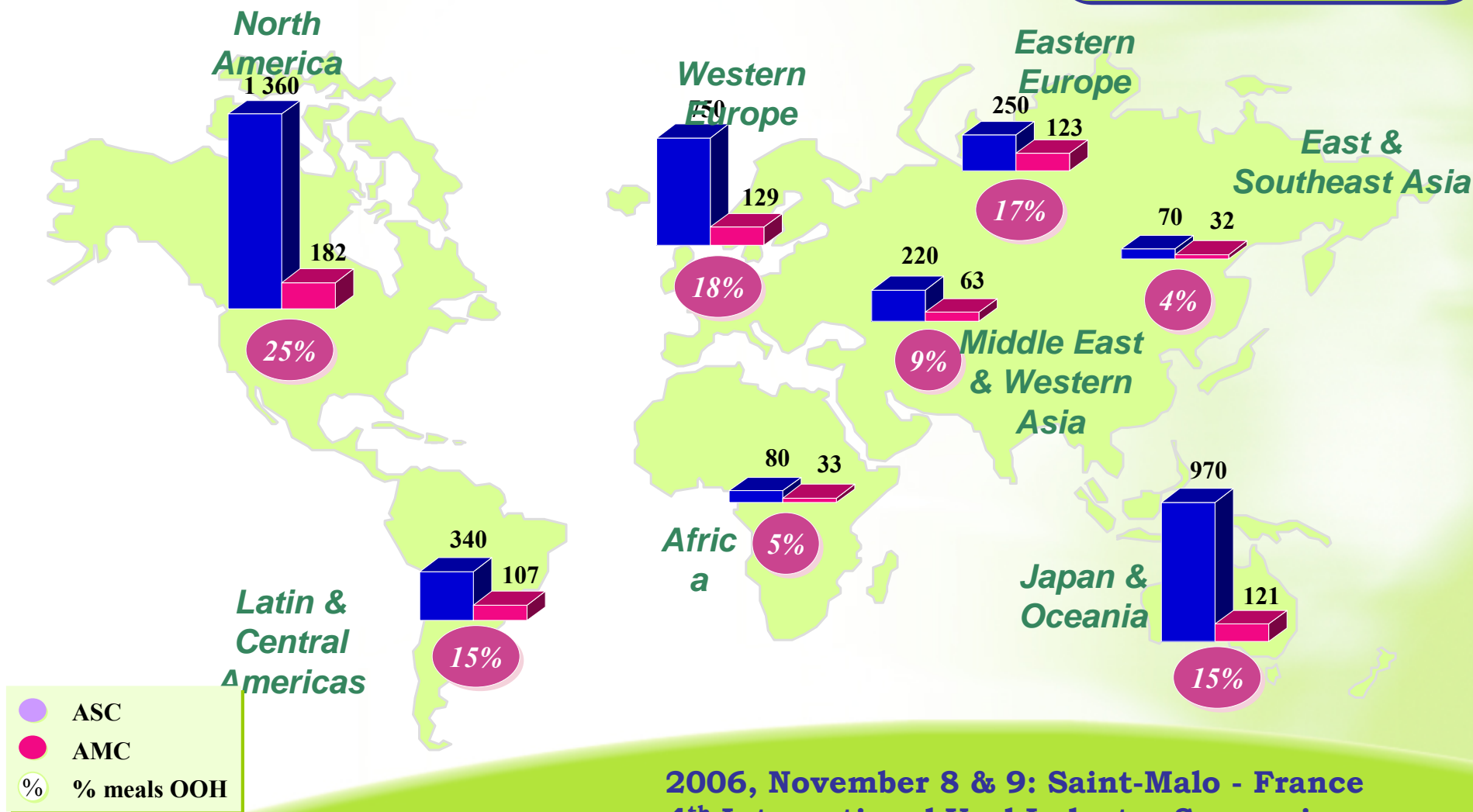
World Population: 6 500 million

OOH Turnover: 1 600 bn Euro

Average spend/capita: 250 Euro

Number of OOH meals: 400 bn

% OOH Meals: 8%

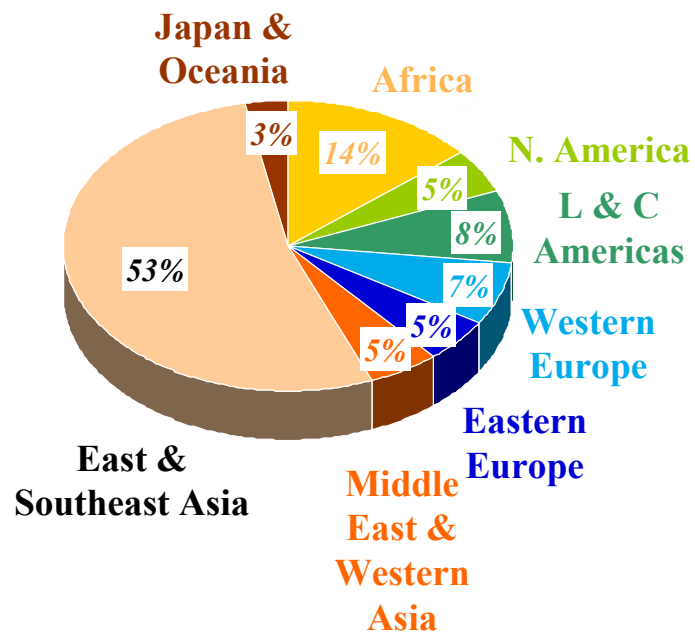


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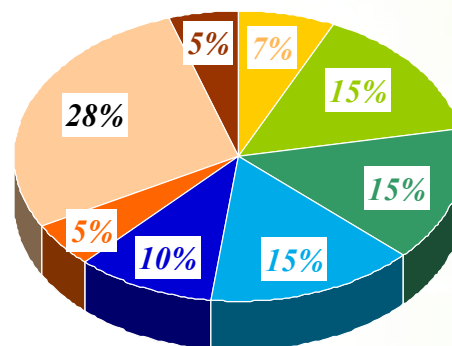
The World OOH Market - 2005

Split by World Regions

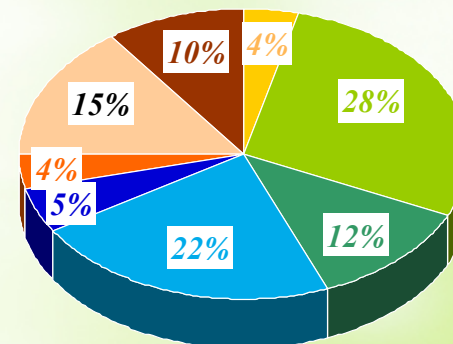
Population
6.5 billion



Meals
400 billion



Foodservice spend
1 600 billion €



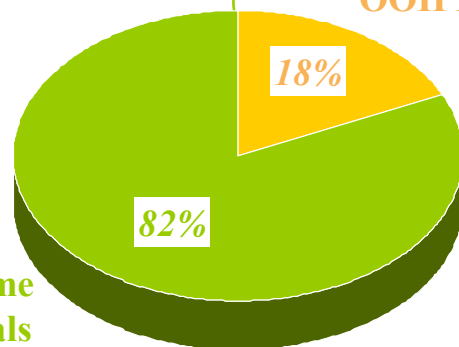
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Total Foodservice in Europe - 2005

Population:
465 million

Meals
340 billion

OOH Meals

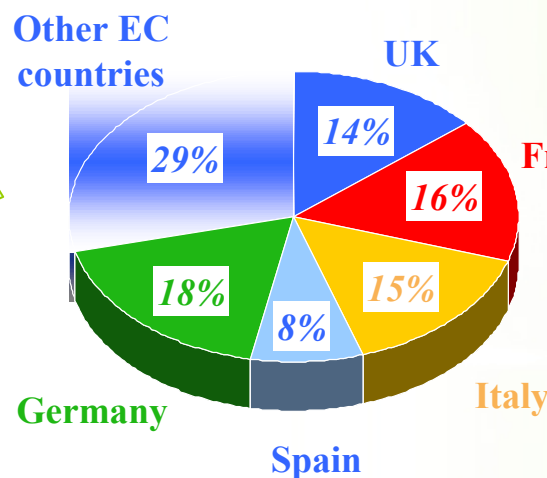


Home meals

Foodservice: 60 billion meals
130 meals per capita / year

Foodservice Spend
350 billion €

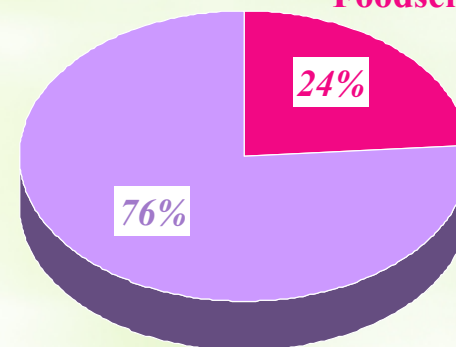
Other EC countries



France

750 € per capita / year
Average spend per meal: 6 €

Social Foodservice

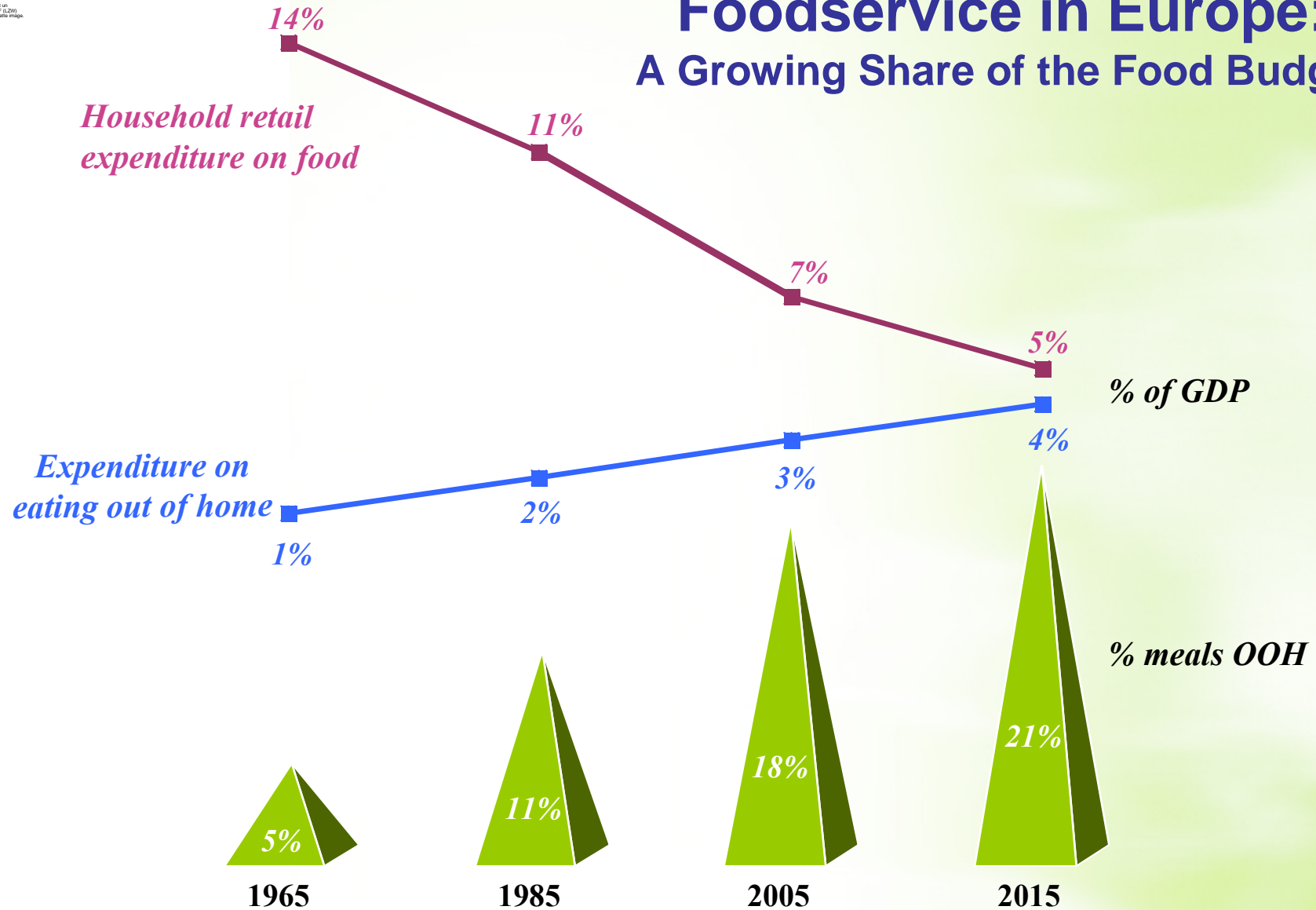


Commercial Foodservice

2 million restaurant units

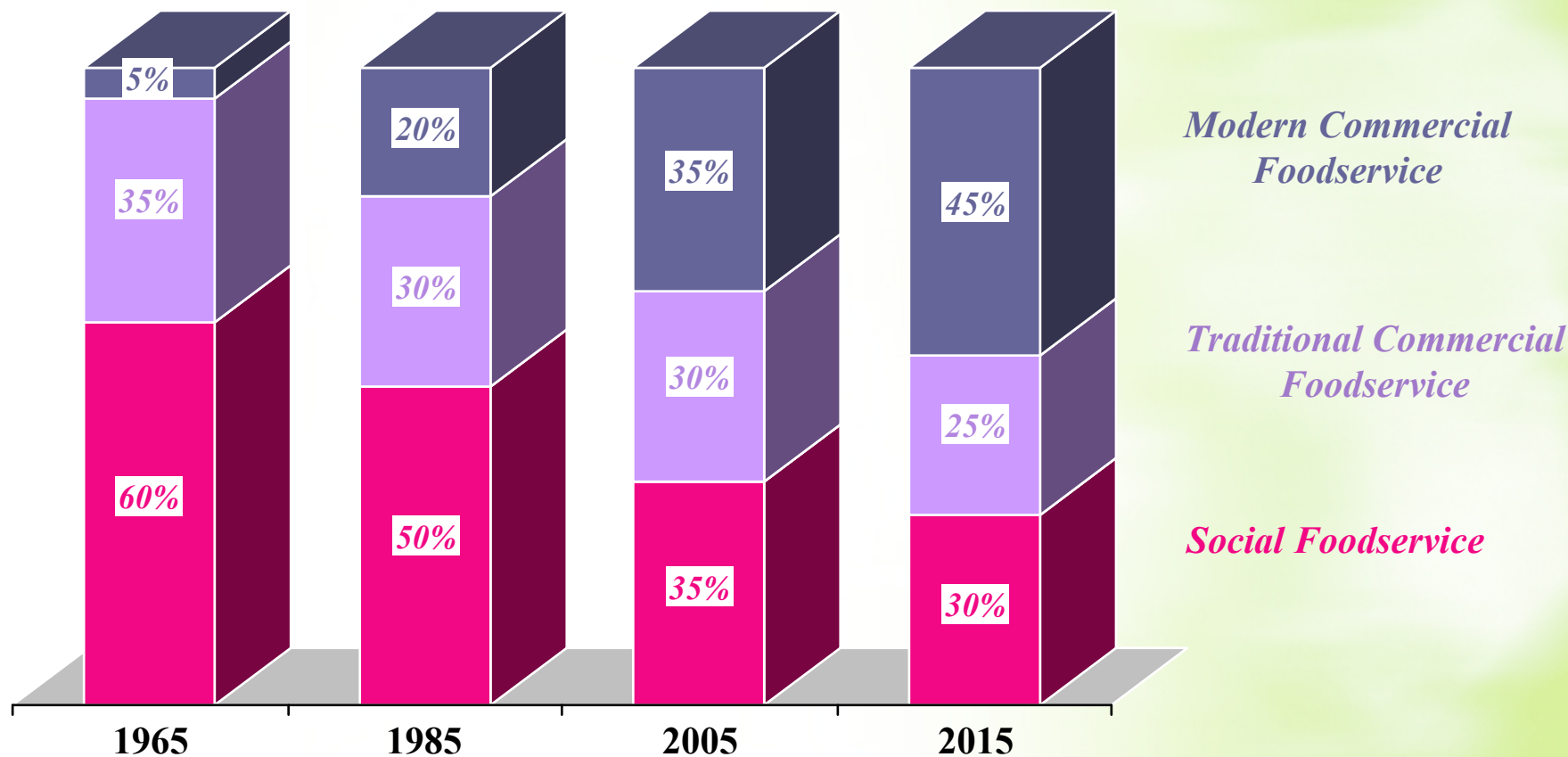
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Foodservice in Europe: A Growing Share of the Food Budget




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Foodservice in Europe: The Way the Market has Changed




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Foodservice in Europe: Changes in the Structure of Meals



Lunches are getting lighter \Rightarrow a move towards Northern European eating habits, based on the purely physiological function of the mid-day meal

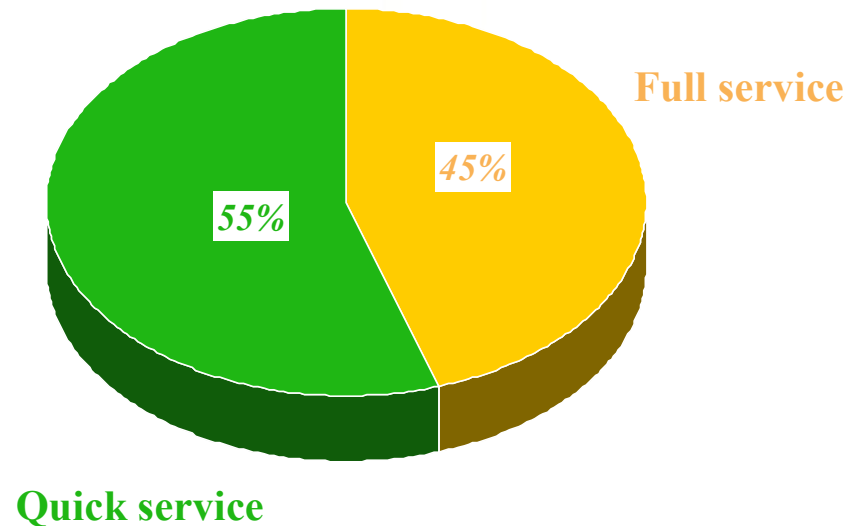


The evening meal gains in importance \Rightarrow a move towards Southern European eating habits, based on a meal with an important social function

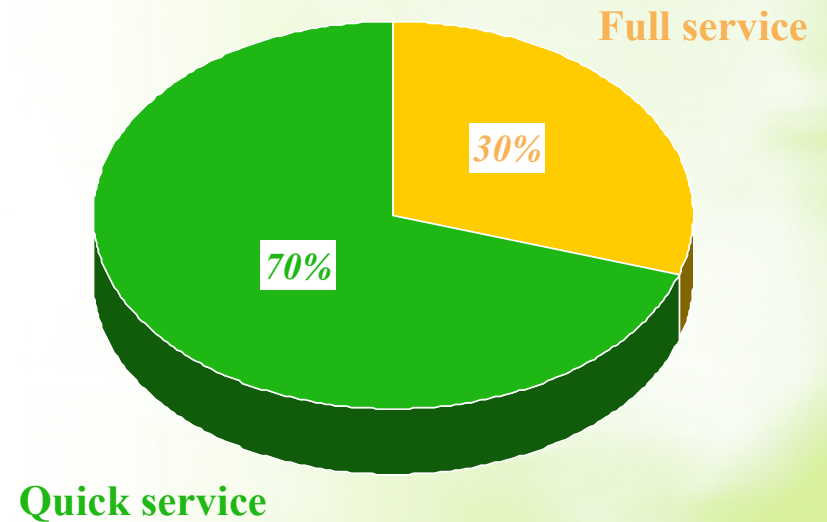
Broad Breakdown of Commercial Foodservice

% meals

Western Europe



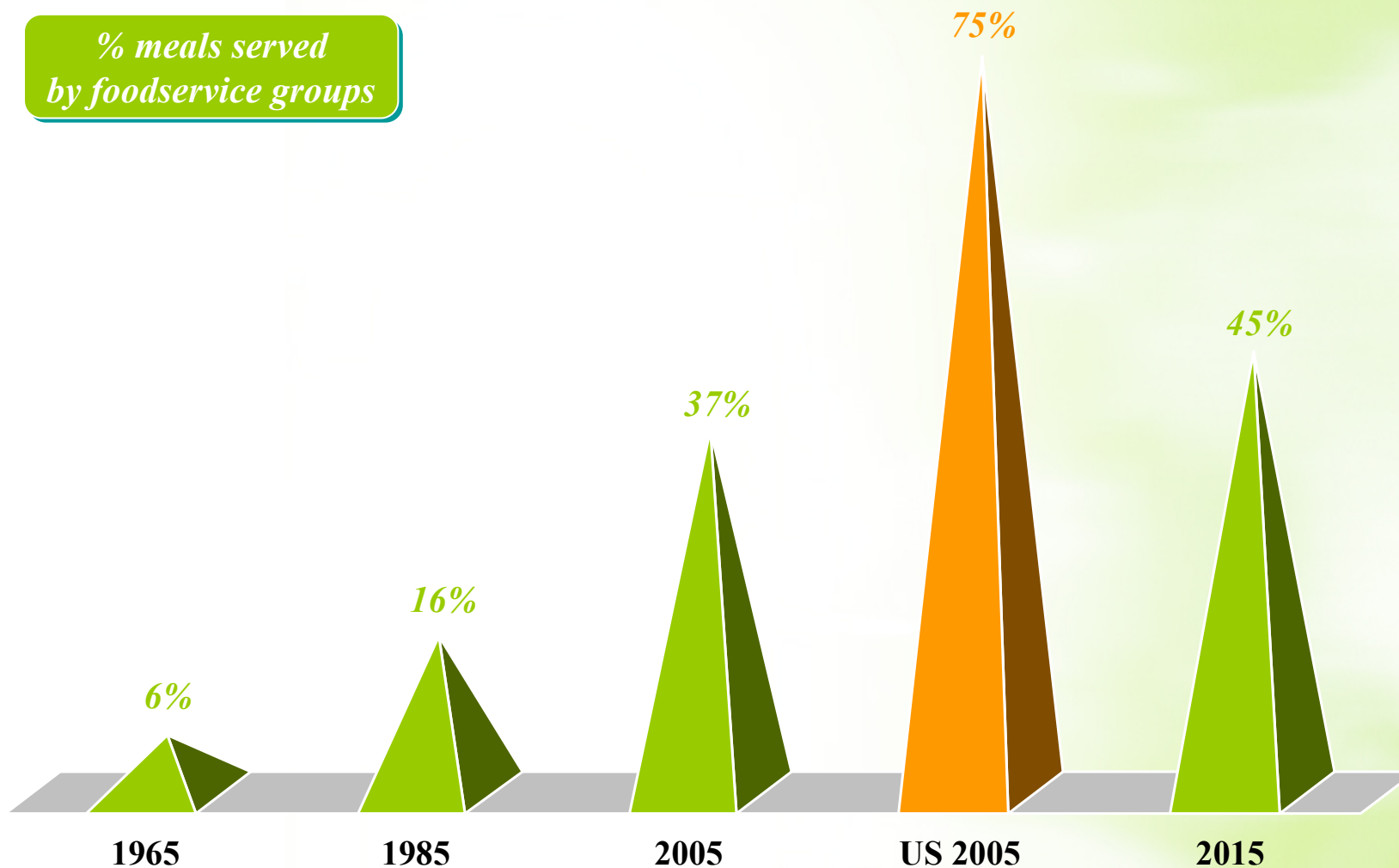
North America



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Foodservice in Europe: A Market whose Structure is Evolving

*% meals served
by foodservice groups*

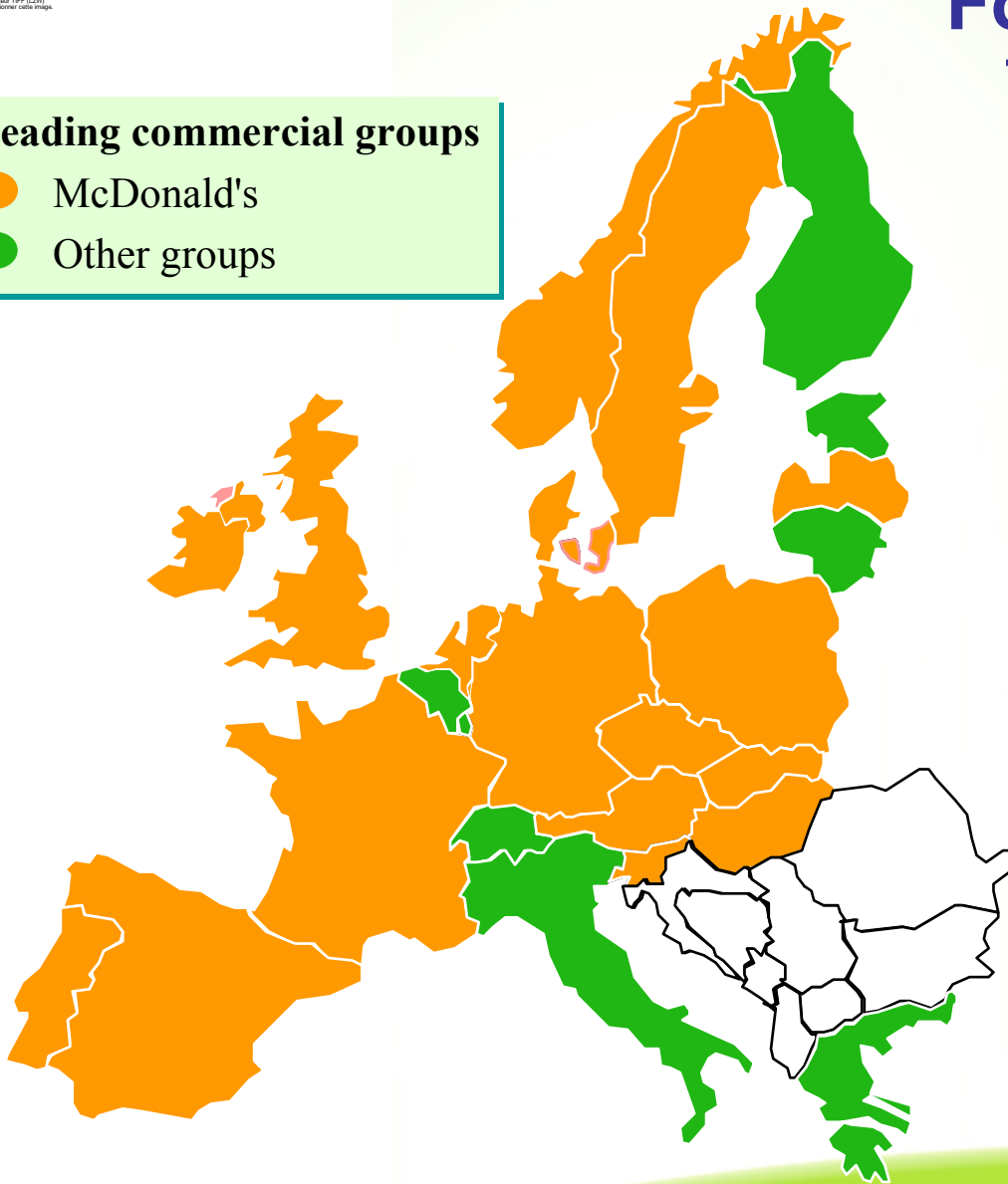


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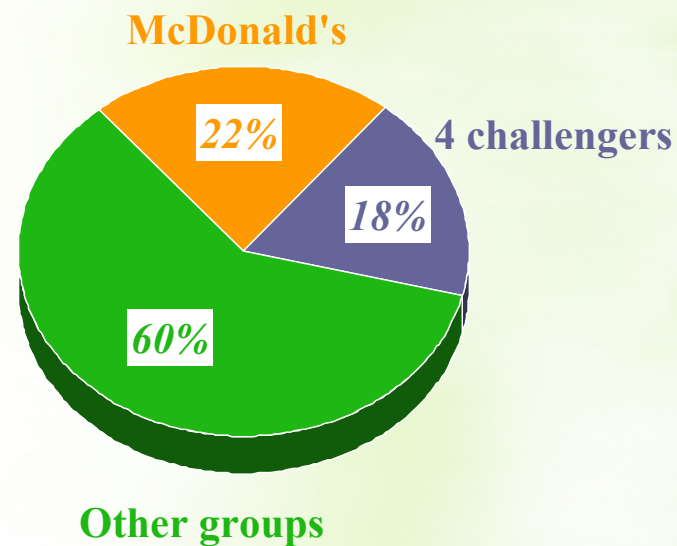
Foodservice in Europe: The Concentration of Power

Leading commercial groups

- McDonald's
- Other groups



Turnover: 60 billion €

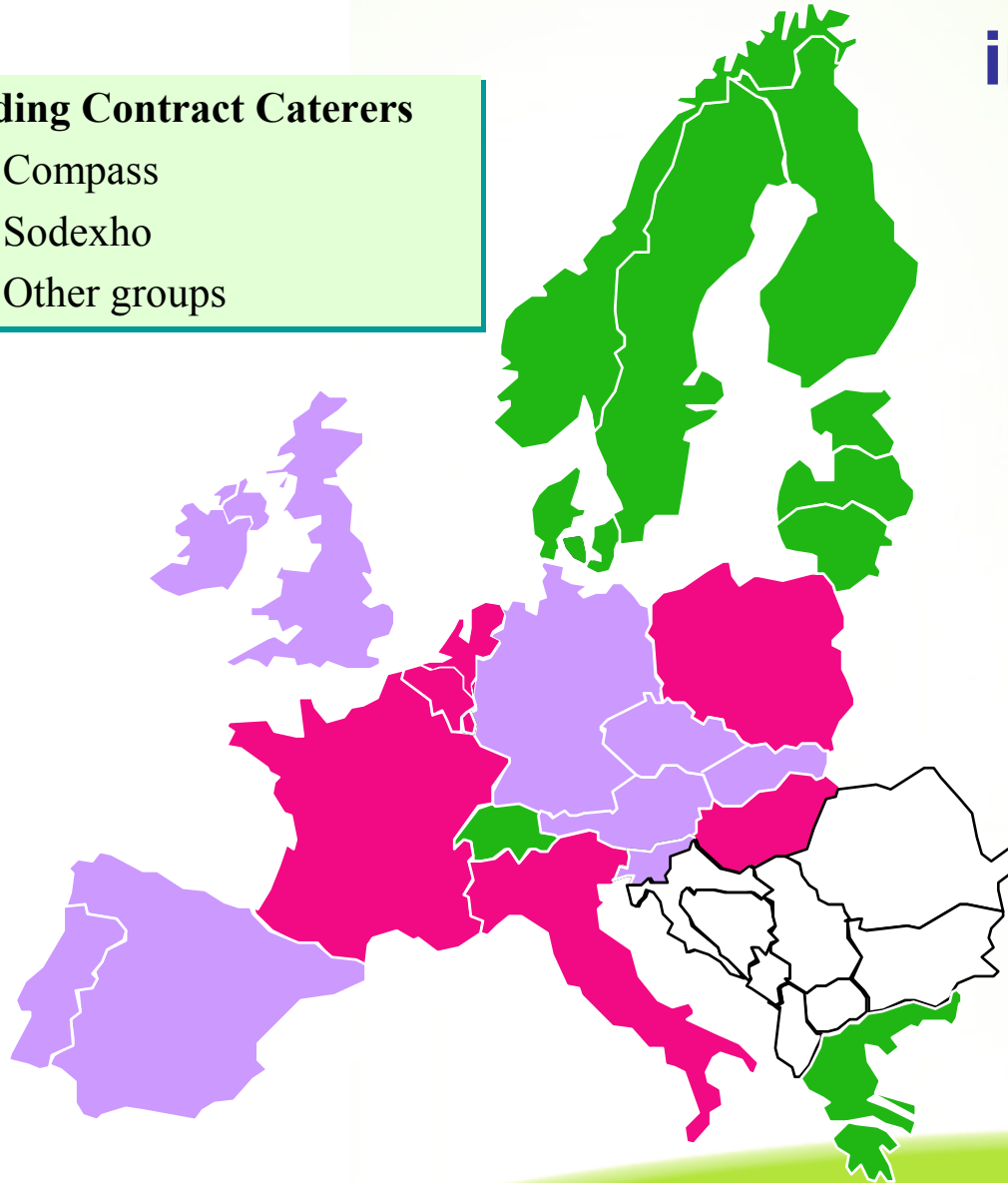


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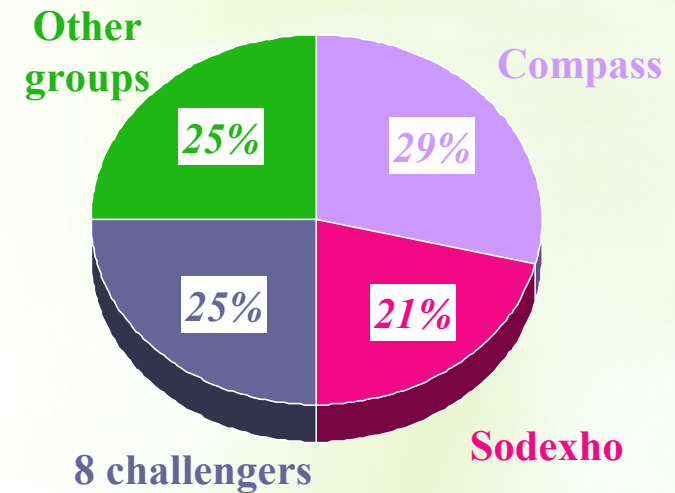
Leading Groups in Social Foodservice

Leading Contract Caterers

- Compass
- Sodexho
- Other groups



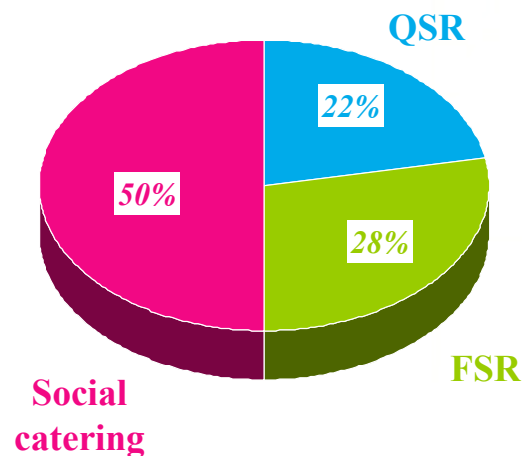
Turnover: 20 billion €



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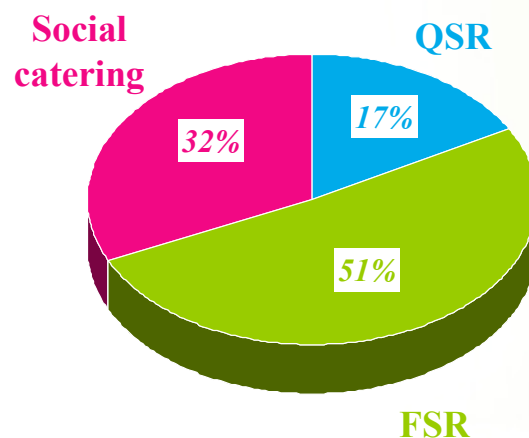
French Foodservice Market - 2005

Meals
6 billion



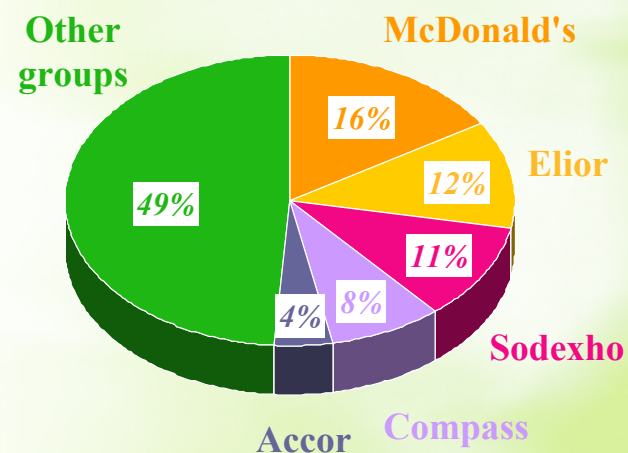
14% of all meals
in France

Turnover
51 billion € inc VAT



Average price:
8,5 € inc. VAT

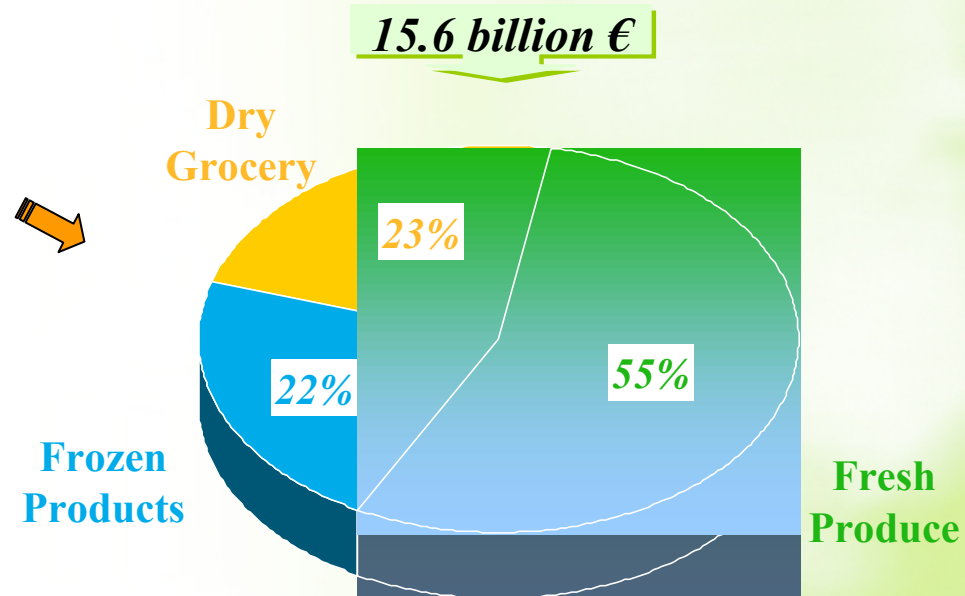
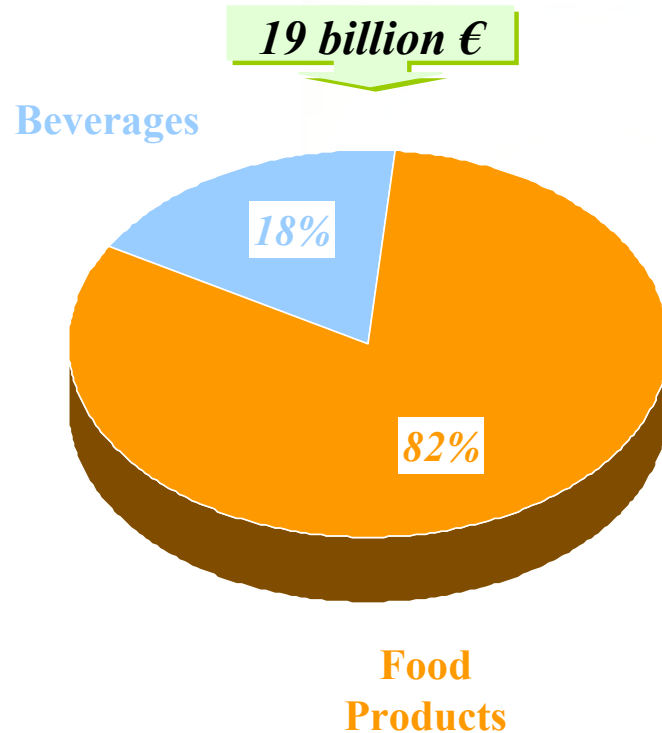
**Foodservice
Groups**



1/3 of the market

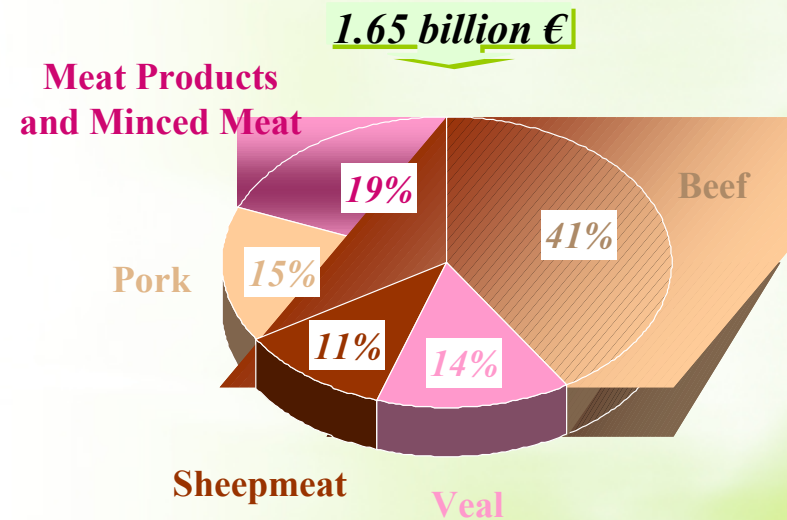
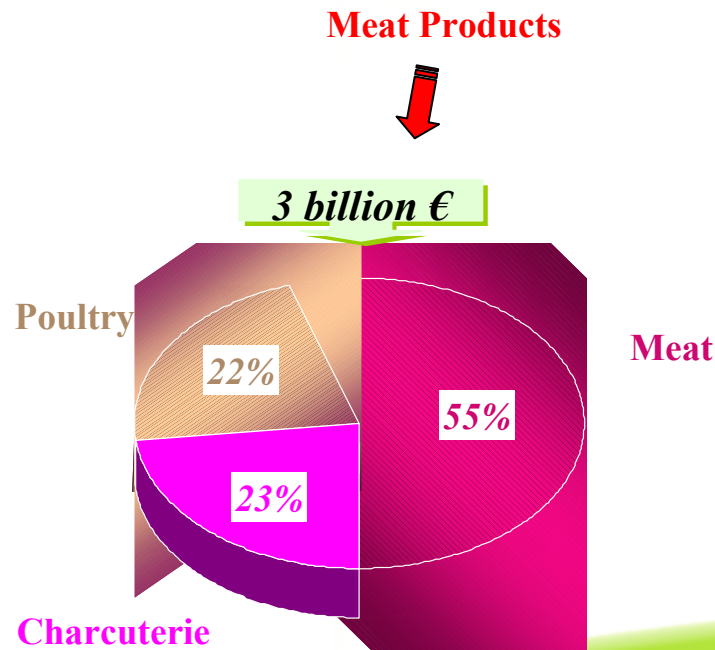
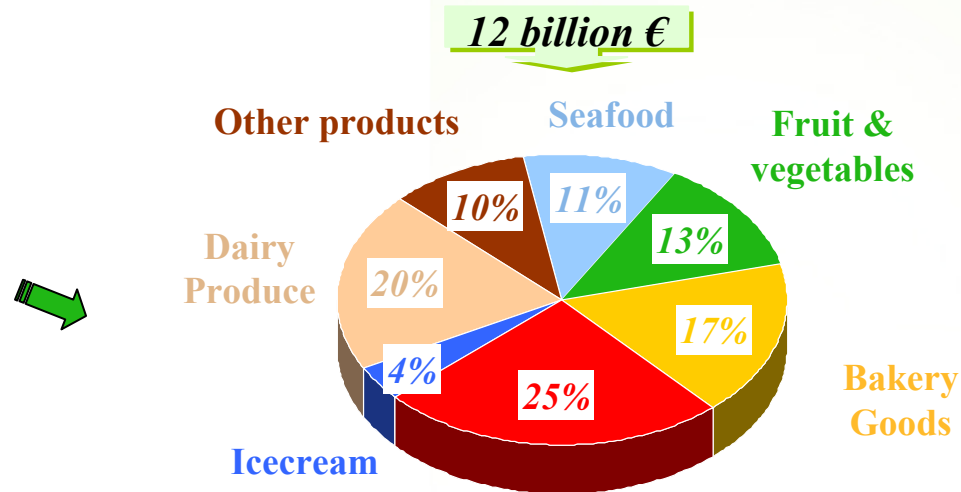
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Total Food Purchases in Foodservice Market



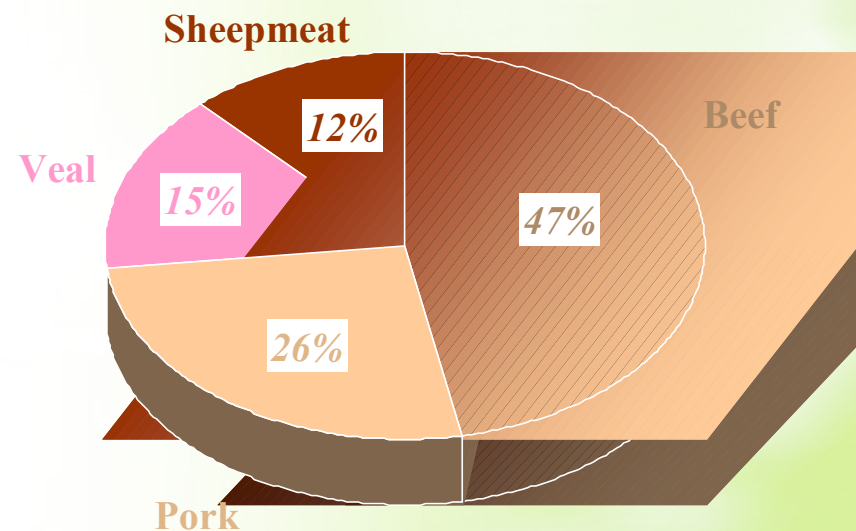
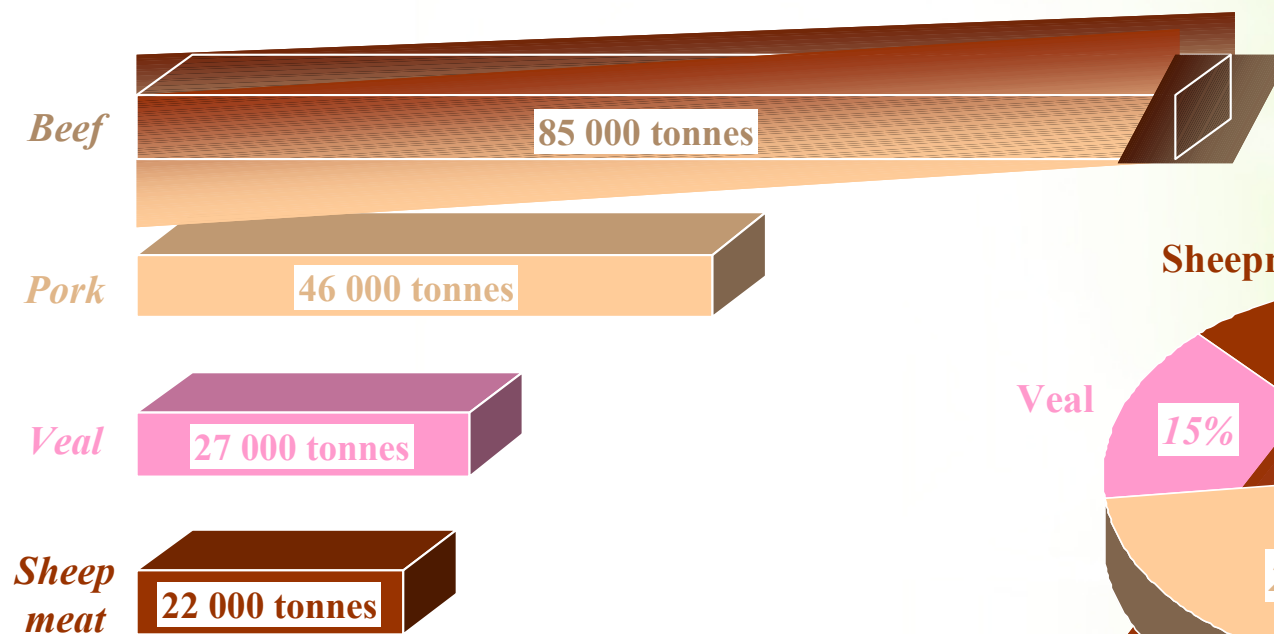
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Food Purchases: Fresh & Frozen Products in Foodservice Market



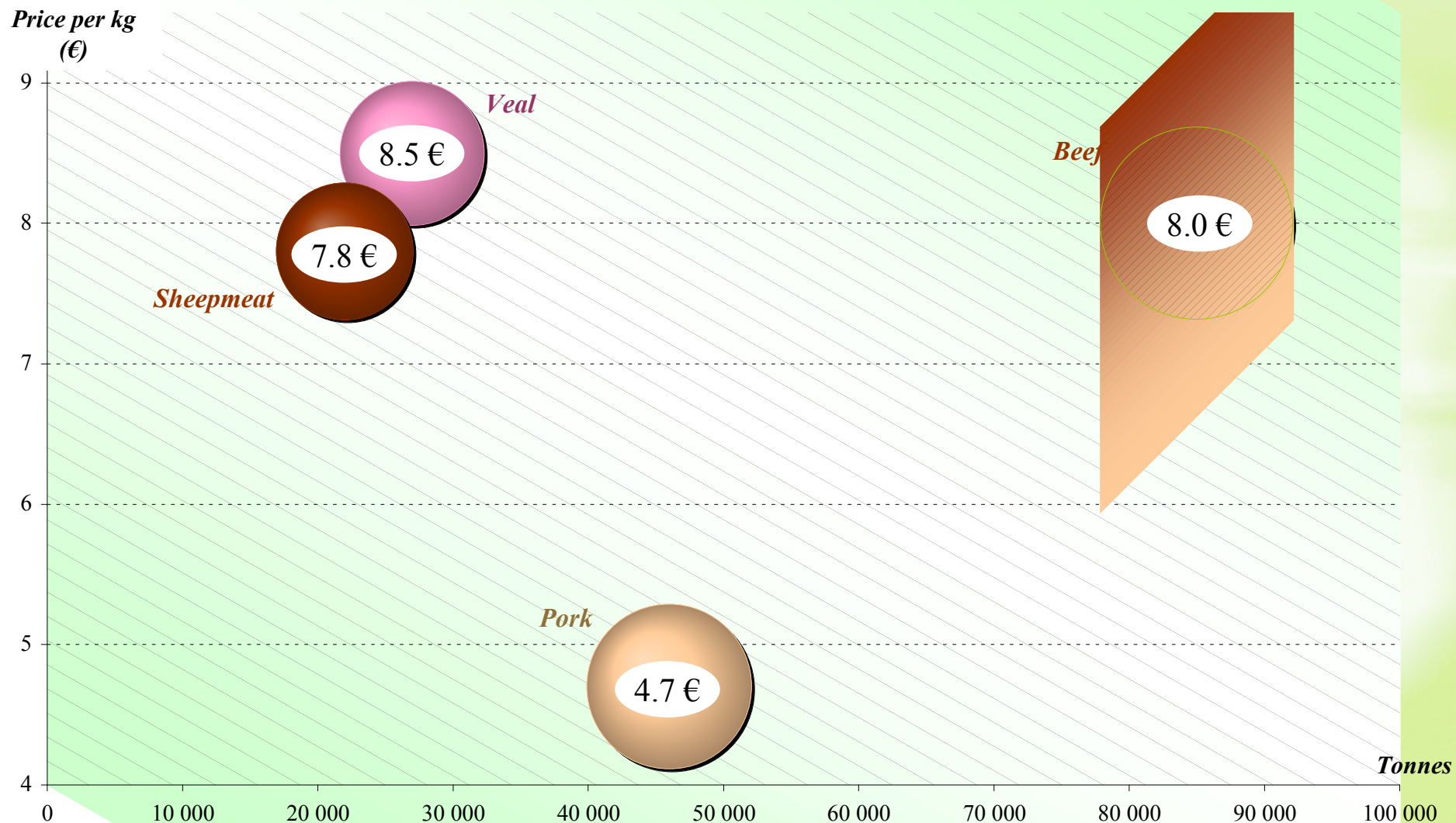
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Meat in the Foodservice Market - 180 000 tonnes



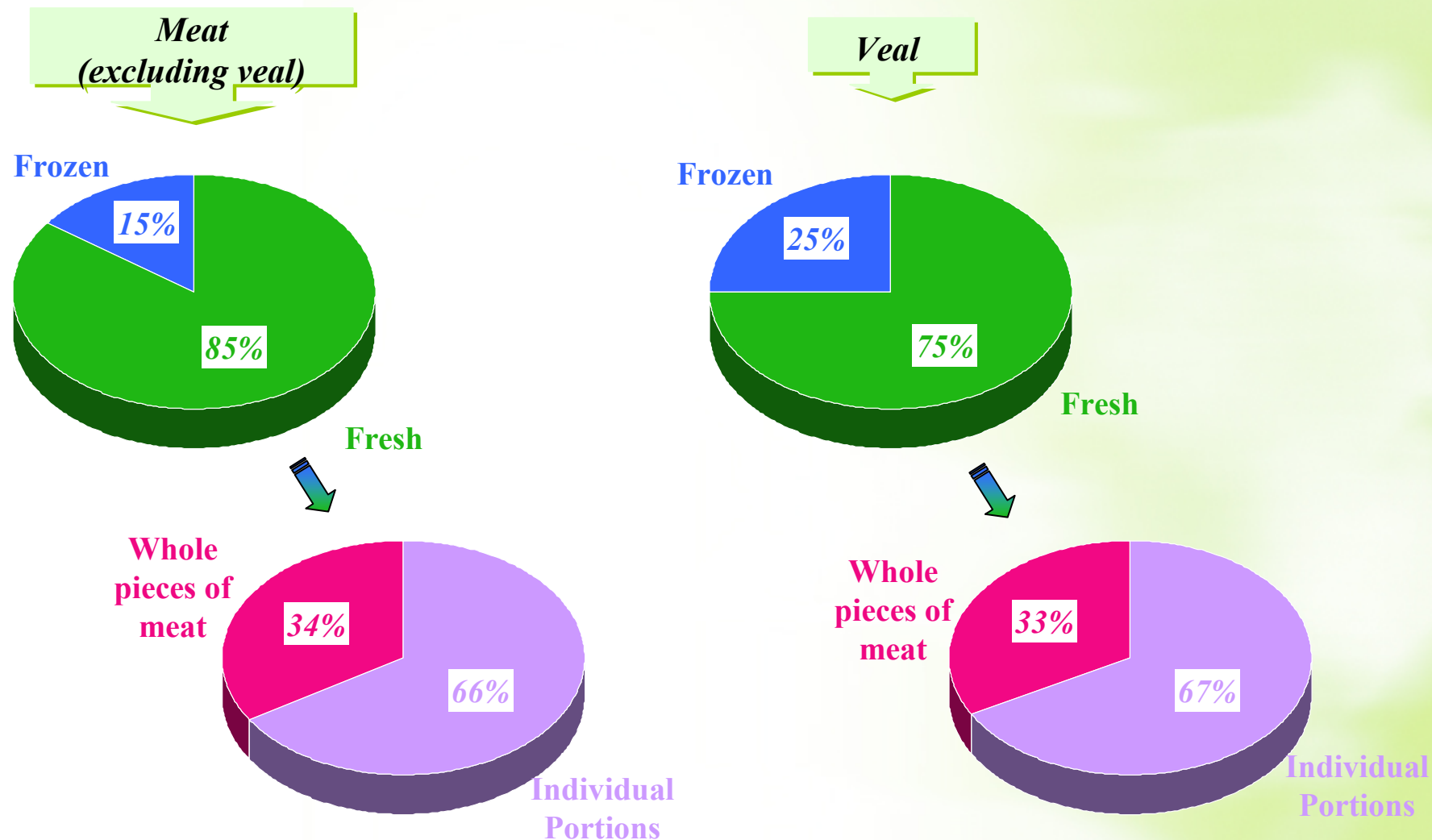
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Meat Consumption / Price



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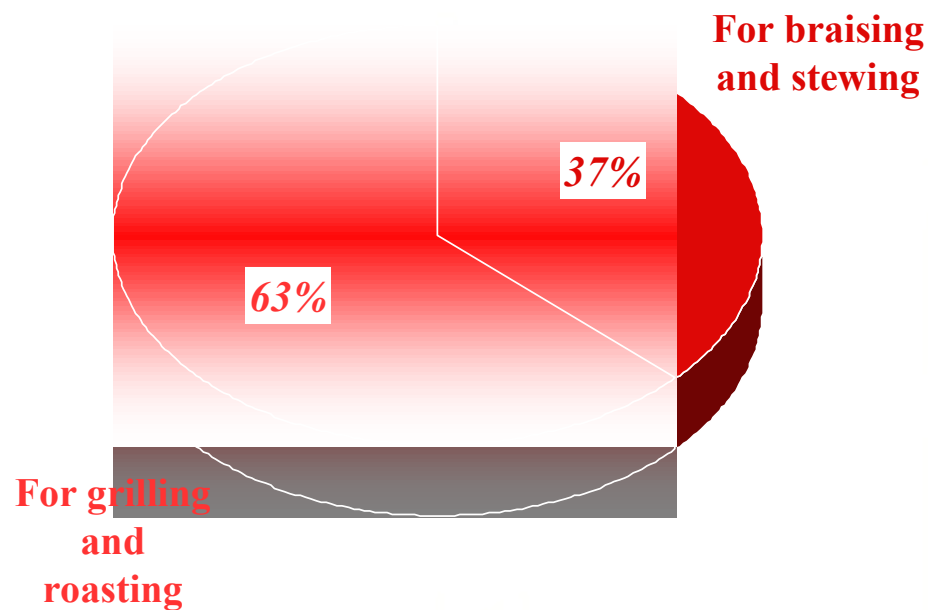
Veal and Other Types of Meat



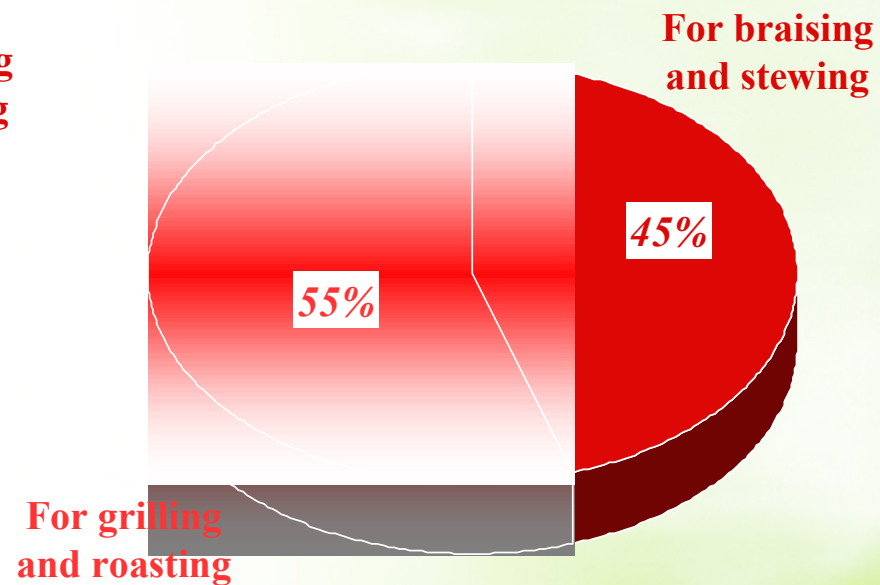
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Veal and Other Types of Meat

*Meat
(excluding veal)*

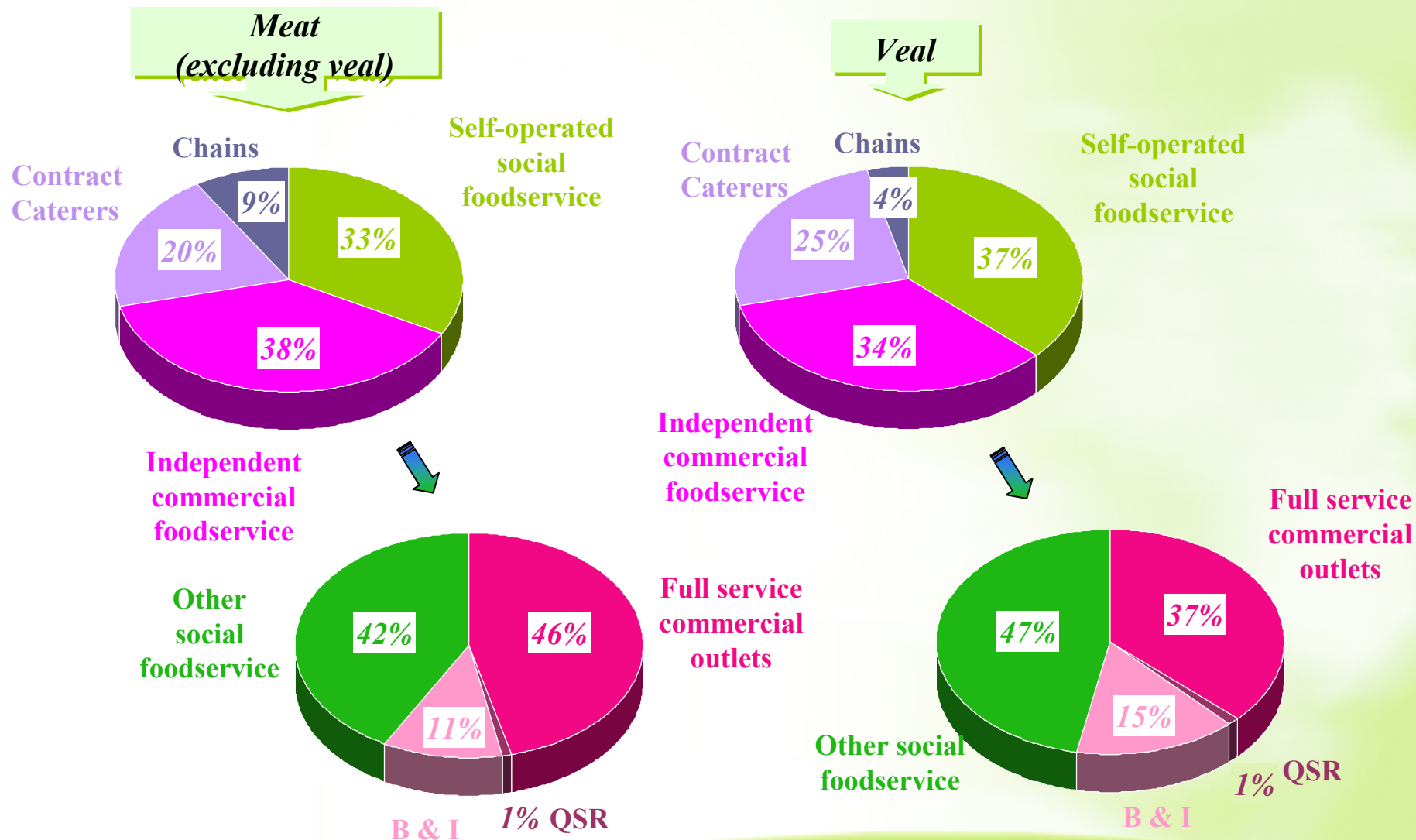


Veal



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The End-User Sectors



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