

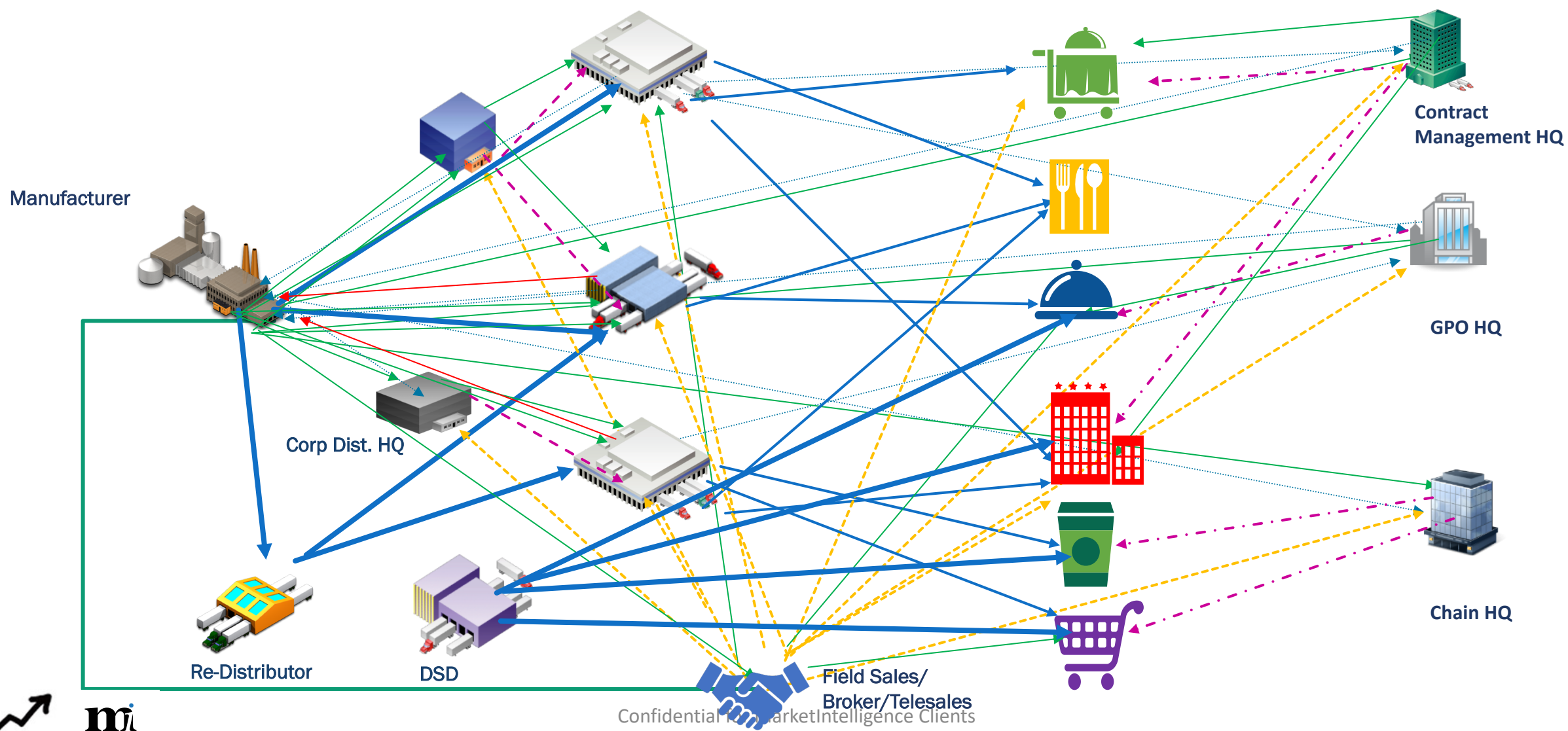
Our Perspective

*Opportunities to maximize Data
for Foodservice Management
Companies*



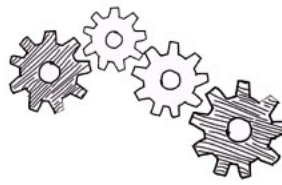


Foodservice is a complicated channel..... with very tight margins





Disruptive Scenarios ➔ what if.....



Consumers ...

- ❑ **Valued CPG brands more** than those of restaurants
- ❑ Moved aggressively towards **fresh, local and sustainable**
- ❑ **Materially redistributed share of wallet** within the existing foodservice channel

Distributors ...

- ❑ **Formed partnerships and ecosystems** that improve create differentiation with manufacturers and operators
- ❑ Had to compete on **trust and sustainability as scale (e.g. through Blockchain)**
- ❑ Were **disintermediated** by large manufacturers or cooperatives

Operators ...

- ❑ Were able to **share consumers preferences with manufacturers in real time** via POS
- ❑ Were able to **use trade funds to digitally target the right consumer with the right offer** to drive traffic
- ❑ Had to **rethink labor models and core competencies**

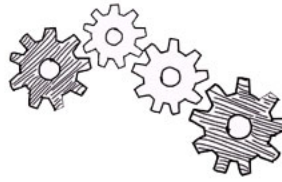
Technology ...

- ❑ Enabled **automated replenishment** across the supply chain, forcing a rethink of the role of sales and service
- ❑ Leveraged **the Internet of Things to connect assets** for allocation and performance
- ❑ Allowed for **driverless deliveries and transportation**
- ❑ **Monetized vast data** across the value chain





Challenges abound for Foodservice Management Companies

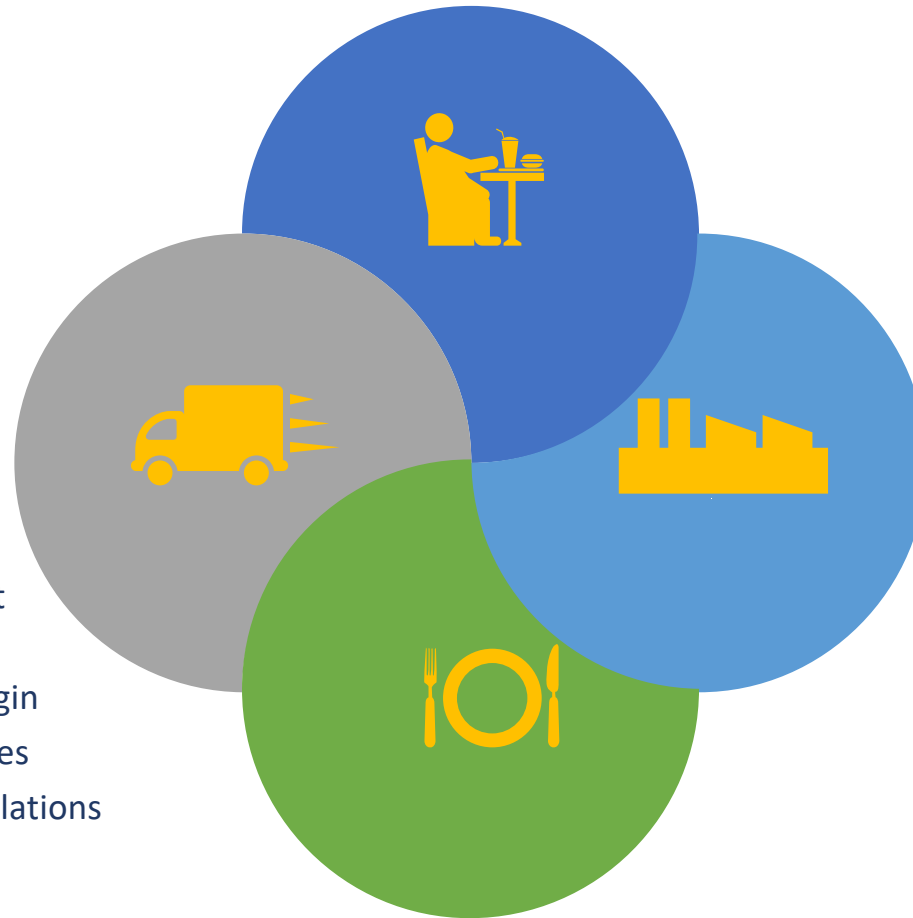


Distributors

- Trying to implement Category Management
- Due to margin pressure promoting own brands without visibility to cost for operator
- Struggle with “local”

Units

- Looking to fresh, local to attract consumers
- High labor costs impacting margin
- Training and recruiting intensifies
- Dealing with sustainability regulations



Consumers are changing

- Away from home –Anywhere, anytime
- Fresh, organic, sustainable, local are the key decision points on where to eat
- Allergens, Special diets increasingly relevant

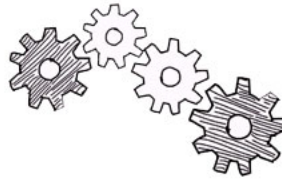
Manufacturers

- Concerned about growth/relevance
- Need to increase visibility to new trends
- Increasingly introducing new products to maintain margins and fight inflation





Where we see the future of Foodservice Management



All food decisions are Local

Help sales marketing and the operator understand the market they are in, trends, demographics, and needs create *food with a story*

Understand the Consumer

Successful operators will find ways to interact with the consumer both to follow and lead, from attributed offerings to delivery and beyond

Analytics underlie everything

Develop Advanced Analytics & AI Capabilities pushing Actionable Insights will reduce inventories, increase turns and make units more efficient

Collaboration

A new approach to how manufacturers interact with operators developing a personalized approach to consumers



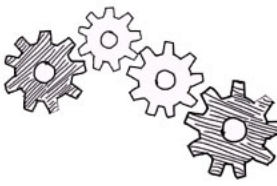
**Exploit data in
a *new* way**

**We have identified two
areas that can enhance a
performance & profitability**

**Rethinking
Profitability**

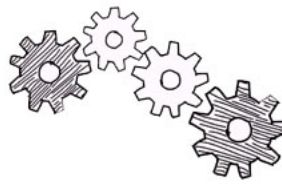


Exploit Data to create new Value



Analytics as a Service

- ❑ Empower the controlled diets and designate suitable substitute products for allergen sensitive populations
- ❑ Leverage combined data from disparate sources to develop a complete view of the operator
- ❑ Utilize advanced analytics, machine learning & artificial intelligence to provide actionable insights to your vendors on what is actually happening with consumers in local markets
- ❑ Create new service for vendors to promote new concepts and offers directly to your customers. And measure the results



Rethinking Profitability

Today Foodservice Management Companies have a wealth of knowledge that is untapped.

Purchase history, POS data, Inventory and spoilage management all are of interest to your vendors.

What if....

You could leverage this data to help vendors better manage their inventory

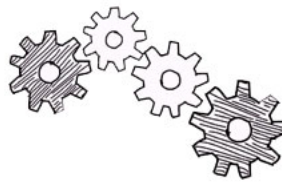
Develop more successful new product offerings

Provide them with trends data

Promote to drive traffic and check averages utilizing vendor trade dollars without sacrificing margin?

Ultimately it's your data that has value

Developing a mutually beneficial long term relationship with suppliers can be a source of revenue



Why Market*Intelligence* ?

- ❑ Will be on board from Strategy to Execution
- ❑ Strong Best In-class Partners
- ❑ Industry expertise
- ❑ Flexible Execution Approach
- ❑ Hands On Process Management
- ❑ Ability to work across Departments

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