



‘BIS Foodservice offers an integrated data and research solution in the foodservice market’

**Syndicated
Multi-Client Studies**



Private Research Projects



Foodservice Omnibus



Consultancy



BIS Foodservice has provided data, research and analysis into the foodservice industry as well as other food and beverage markets for more than 25 years.

Our wide range of services draws on our three core competencies:

1 Market Research & Market Intelligence

2 Market Size Modelling

3 Industry Forecasting

Our business passion is to develop a growing suite of essential data, research and analysis offerings that support our clients in their endeavours to achieve success in foodservice markets.

BIS FOODSERVICE FIELD TEAM



We run a small team of dedicated interviewers conducting all survey work. These interviewers are trained and have extensive experience in interviewing foodservice operators. Through this internal field force we consistently monitor and check data collection and sampling ensuring the highest level of data quality.

AUSTRALIAN FOODSERVICE

Australian Foodservice is a continuous information service tracking key trends, developments and market drivers within a highly dynamic industry as well as providing detailed market size data down to product and channel level.

The information service comprises **three main modules**:



Australian Foodservice Delivers Yearly:

- > Market Size Database
- > Outlet Numbers & Meals Served Database
- > Market Insight Reports in May & December
- > AFS Quarterly Reports on the Outlook for the Australian Foodservice Market
- > Client Workshops

All databases and reports are delivered via on-line access to the **BIS Foodservice Information Portal**.

AUSTRALIAN FOODSERVICE

A continuous information service:
Foodservice Market Size > Foodservice Insights > Foodservice Forecasts

www.bis.com.au

“BIS Foodservice has been an excellent resource for Nestlé Professional over a number of years. Their research and detailed insights have provided opportunities and highlighted issues within the foodservice industry which help shape the direction of our business.”

BIS Foodservice consistently provides data that is clear and reliable allowing Nestlé Professional to clearly chart a direction for future success based on sound insight. I would highly recommend this service when making decisions that enhance the knowledge and expertise of any business.”

Pat Stobbs
Country Business Manager,
Oceania Nestlé Professional



Coffee & Beverages
in Australia



www.bis.com.au

BIS Foodservice
FORESIGHT

COFFEE & BEVERAGES IN AUSTRALIA

Australians' consumption and preferences for coffee and various non-alcoholic beverages evolve over time. The international coffee and café culture that has swept the world is here to stay but it will take a generation before Australians' coffee preferences change at home.

BIS Foodservice yearly tracks Australians' changing consumption patterns and preferences for coffee and other hot and cold beverages in the three markets:

At Home



At Work



Away from Home



FAST FOOD IN AUSTRALIA

Fast Food in Australia uncovers Australians' total fast food consumption as well as their fast food and snack food preferences. The report and database track consumption, trends and developments within each fast food category building on our regular studies in this market over the past 20 years.

1

The report establishes total market size for 57 fast food and beverage products within six main product categories by:

- ▶ Volume Consumed
- ▶ Value at Consumer Prices

2

Outlet Number Database covering:

- ▶ Major & Minor Fast Food Chains by State
 - ▶ Snack Food Chains by State
 - ▶ Independent Outlets by State

3

Fast Food Consumption & Preferences

4

Who is the Fast Food Consumer?

5

Chain Usage & Awareness

6

Fast Food Consumer Index

7

Fast Food Market Outlook

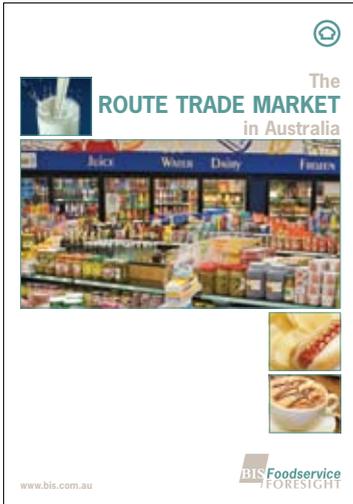


“I’d like to congratulate BIS Foodservice on delivering an excellent report into the Australian bakery market. The private research study has provided us with valuable market sizing, competitor share and product trend information; which is now being used to shape our food service strategy. It also comes at a vital time when the wider business is conducting a comprehensive review of our product portfolio. There is no doubt that the report will provide us with a significant competitive advantage.”

Thanks again Sissel, Tim and the team at BIS.”

Tim Lucas
Marketing Manager – Foodservice
Tip Top

a division of George Weston Foods



THE ROUTE TRADE MARKET IN AUSTRALIA

The Australian Route Trade Market is an important consumer market for certain food and beverage products. There are more than 22,000 route trade outlets nationally, accounting for significant distribution shares of food and beverage products.

Five key product categories:

BEVERAGES – HOT & COLD

BAKERY PRODUCTS

CONFECTIONERY

DAIRY PRODUCTS

SNACK FOODS

Report Modules:

ROUTE INDUSTRY MEASURES

MARKET SIZE DATABASE

CHANNEL INSIGHTS

BRAND ANALYSIS

DISTRIBUTION IN THE ROUTE TRADE MARKET

MARKET OUTLOOK

FOODSERVICE EQUIPMENT IN AUSTRALIA

The Australian Foodservice market is a diverse and sophisticated market with a wide variety of cuisines on offer as well as different commercial outlet types and eating out options.

The Foodservice Equipment market is a competitive market with the majority of all international brands represented here across the four main equipment categories and products:



PREPARATION



REFRIGERATION



COOKING



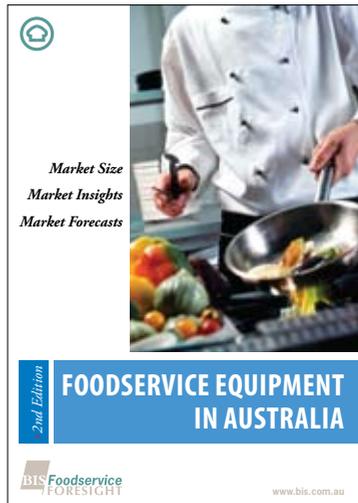
WARE WASHING

The **market size database** delivers:

- ▶ Total number of units installed and value by foodservice channel
- ▶ Equipment incidence & penetration rates by foodservice channel
- ▶ Total annual new & second-hand equipment sales

The reports address:

- ▶ Foodservice Channel Structure & Drivers
- ▶ Brand Analysis
- ▶ Service & Maintenance
- ▶ Equipment Financing
- ▶ Market Outlook



“On behalf of my executive team I wish to convey our sincere gratitude to BIS Foodservice for providing our business with such a brilliant market study. The Market Study Report covering market size, market shares and competitor analysis was outstanding. Additionally, the Report’s inclusion of buyer behaviour, market segment trends and key issues driving the purchasing decision of our customers ensures that our future planning shall be based on solid facts.”

Thank you for being so professional, demonstrating a huge depth of experience in the Food Service market and providing Hobart market intelligence which is of extraordinary value.”

Geoff Hunter
General Manager
Hobart Food Equipment
Australia & NZ

NEW ZEALAND FOODSERVICE

N*ew Zealand Foodservice is an information service addressing key trends, developments and drivers within a fast changing market as well as delivering detailed market size data down to product and channel level.*

The information service comprises **three main modules:**



The reports cover:

- › Brand Analysis & Awareness
- › Communication & Promotion in Foodservice
- › Distribution & Supplier Choice
- › Tracking of Internet Usage in Foodservice
- › Healthy Eating & Dietary Requirements



FOODSERVICE IN ASIA & THE MIDDLE EAST

Since 1997, BIS Foodservice has delivered syndicated as well as bespoke research projects covering the following foodservice markets in Asia and The Middle East:



SOUTH EAST ASIA

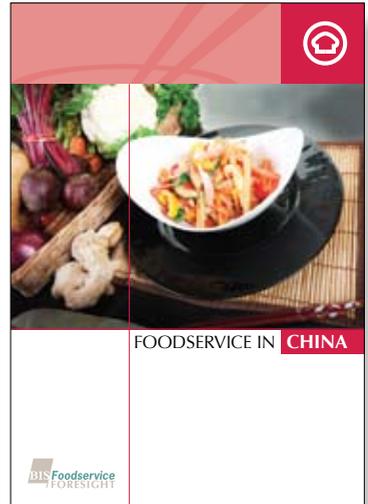
- ☞ Malaysia
- ☞ Singapore
- ☞ Thailand
- ☞ The Philippines
- ☞ Indonesia
- ☞ Vietnam

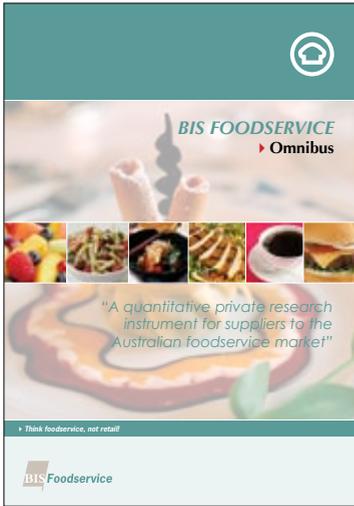
CHINA REGION

- ☞ China
- ☞ Hong Kong
- ☞ Taiwan

THE MIDDLE EAST

- ☞ Kingdom of Saudi Arabia
- ☞ United Arab Emirates
- ☞ The Gulf States
- ☞ Egypt





BIS FOODSERVICE OMNIBUS

A quantitative private research instrument for suppliers to the Australian Foodservice Market.

BIS Foodservice Omnibus is able to:

- ➔ Deliver findings & analysis on your specific questions
- ➔ Identify market opportunities for your products & services
- ➔ Highlight competitive threats
- ➔ Market segmentation for your products or services
- ➔ Track market developments, changing attitudes and product usage

BESPOKE RESEARCH

BIS Foodservice regularly undertakes privately commissioned projects covering a range of different areas.

This includes, but is not limited to:

- Brand share & market size data
- Product positioning analysis
- Specific market & marketing information
- Market opportunities & growth potential
 - Brand reputation & analysis
 - Product attributes analysis
- Market & consumer cluster analysis
 - Choice modelling
- Total supply & demand for food & beverages
- Industrial & manufacturing food & beverage data and information

Our Clients





CONTACTS

Sissel Rosengren

srosengren@bis.com.au

Tim Emmerson

temmerson@bis.com.au

BIS FOODSERVICE

SYDNEY

Level 8, 99 Walker Street
North Sydney NSW 2060
Australia

T: +61 (0) 2 8458 4200

F: +61 (0) 2 9959 5795

Kevin McDonald

kmcdonald@bis.com.au

MELBOURNE

Level 1, Rialto North Tower
525 Collins Street
Melbourne VIC 3000

T: +61 (0) 3 8679 7300

F: +61 (0) 3 9614 0033

www.bis.com.au

BIS Foodservice
/ FORESIGHT

