



1st-10th

European Foodservice Summit

Think Tank and Congress for the Restaurant Industry





The three partners/hosts: Chris Muller, Gretel Weiss, David Bosshart

Early in 1999, the three of us, Gretel, David and Chris, came together and identified the need for a new kind of foodservice industry meeting, one with a truly European focus. Our belief was that the industry was in search of a way to combine content and community, of sharing both cutting edge ideas and a long tradition of convivial social gathering.

At that first planning session we promised to bring our three different observational perspectives together – the media, commercial and economic research, and teaching – to design a conference that would strive to move the industry forward. We called this new model the 1st European Foodservice Summit, a name reflecting both our focus and our lofty goals.

With this in mind we quickly decided that the setting for the Summit needed to be unique, exciting, and borderless. Zurich was our obvious choice. Not sure of how many guests we would attract, we chose the historic

their vision of the future. After an opening Wine Tasting Challenge that evening, the first banquet was topped off with industry icon Ueli Prager, founder of Mövenpick, receiving a special Lifetime Achievement Award. The EFSS was on its way.

This booklet is a visual reminder of each of our friendly get-togethers during the following years. Remarkably, more than a dozen of the original participants from the first days in 2000 will be attending the 10th Summit this year.

But, even before it was time to close the final first session, the founders realized that we would have to find a new home to meet the needs of the industry. With the help of our new volunteer Board of Advisors, for the 2nd EFSS the decision was made to move to the beautiful Lake Side Casino at the Zurichhorn on the lake. This allowed the Summit to expand to a maximum of 250 guests. Strong and continued financial

Sheraton Arabella as our host hotel, beautifully nestled on a mountainside with the sound of Swiss cowbells just outside the windows. The conference itself would be at the main meeting space in the Gottlieb Duttweiler Institute, with planned capacity for around 125. But, by the opening session, the list of participants had grown so large that a second room needed to be set-up in the GDI Library with closed circuit televisions and a champagne bar. As they say, it was "standing room only".

The first agenda included presentations from a broad variety of experts, highlighted by Professor Rolf Jensen speaking about his best selling book "The Dream Society", Jürgen Knauss telling about how McDonald's customized its advertising message for the German market, and a closing plenary panel of industry leaders sharing

and personal support was given by our Educational Partners. The Restaurant Study Tours in Zurich planned and organized by Jürg Landert and his crew are one of the Summit's perennial and much sought-after highlights.

With the move to the Lakeside, we also began the special relationship the EFSS has with Marche International and the team of culinary stars assembled by Oliver Altherr. Each year, at the end of the first day, the conference attendees slowly saunter down the pier to embark on a "Cruise to Nowhere." There we spend a glorious evening aboard a classic Lake Zurich steamer, dining on impossibly hand crafted delights, renewing old friendships, and making new memories. Some hint that there are more deals struck on the boat than during the entire rest of the year on land.

To Our Dear

Today, after a decade of loyal support from the foodservice industry we all respect and admire, the 10th European Foodservice Summit welcomes more than 250 leaders from over 20 different countries representing all corners of the globe. The promise of the 1st EFSS that we were at the beginning of a "European Decade" has come true. Everything is only possible because of the strong support and loyal attendance each year from all of you, who continue to hold us to our promise to design a different kind of conference for a different kind of leader.

With this promise still our guide after ten years, the planning for next year's event will start when the Board meets over a glass of champagne immediately after we leave the stage.

So please know that at the heart of our promise is our sincerest thanks to all of you, our friends, our partners, our community.

Gretel, Chris and David

Summit Friends

Content & Community

The attendees of the European Foodservice Summit have been asking ourselves "What comes after what comes next" for a decade now. Our goal has always been to address the challenges that the industry confronts to capitalize on new opportunities and to minimize unforeseen risks in ever shifting market environments. There are no more written rules or guarantees, but by creating a community of leaders and learners we can share ideas and face the future together.



We started in 2000 to set an agenda for the European decade. We have seen the creation and expansion of the Euro as a world leading currency, the introduction of home grown multi-national restaurant concepts, the rapid acceptance of multi-ethnic cuisines from Japan, Vietnam, Thai-

land, regional China, India, Ethiopia, Morocco, and West Africa among many others. This world cuisine is now part of the European national palate. During the same time, new management techniques, new sources of funding and new forms of ownership have become standard.

While it has been a remarkable decade the challenges identified ten years ago – nationalism, social welfare, real estate sites, and governmental regulations – are even more complex and daunting today. The new European Decade, 2010-2020, presents enormous opportunities from changes in technology, migration, aging populations, digital natives, and big but more ineffective central governments.

The advent of a true consumer society, the sophistication of a new generation of foodservice and hospitality customers and managers, and the growing stability of the Euro zone combines to create new economic imperatives for regional cooperation and competitive market realignments.

The three Partners/Hosts

FoodService Europe & Middle East, the leading b-to-b magazine for the multinational restaurant industry is published by the Deutscher Fachverlag GmbH in Frankfurt/Germany. The company owns more than 90 titles, which cover 12 economic sectors - food and foodservice are one of the strengths of the publishing house. Largest publication 'Lebensmittel Zeitung'. www.food-service-europe.com gretel.weiss@dfv.de



The University of Central Florida is home to the Center for Multi-Unit Restaurant Management in the new Rosen College of Hospitality Management. Located in Orlando, Florida, the center offers baccalaureate degrees, customized executive education courses and conducts focused research for the corporate restaurant industry. www.hospitality.ucf.edu cmuller@mail.ucf.edu



GDI Gottlieb Duttweiler Institute, European Institute for Economic and Social Studies, is focussing on retailing and the service industry. Main activities: congresses, seminars, consumer and management research. For more than 40 years the independent and future-oriented institute known as the GDI has been developing and providing knowledge and innovative solutions. www.gdi.ch david.bosshart@gdi.ch



Concept/Advisory Board
Teija Andersen, Fazer Amica, FIN-Helsinki
David Bosshart, GDI Gottlieb Duttweiler Institute, CH-Rüschlikon
Ignasi Ferrer, The Eat Out Group, S.L., E-Barcelona
Henry McGovern, AmRest, PL-Warsaw
Tony Hughes, GB-Birmingham
Christopher C. Muller, UCF, USA-Orlando
Herwig Niggemann, W. Niggemann, D-Bochum
Sotiris Seimanidis, Vivartia S.A., GR-Maroussi
Gretel Weiss, Deutscher Fachverlag, D-Frankfurt a. M.

Restaurant Study Tours
Jürg Landert and Partners, www.jlz.ch, CH-Zurich

All lessons (2000 - 2008) compiled by Prof. Dr. Christopher Muller, UCF and Marianne Wachholz, FoodService Europe & Middle East. All photos (except 1st Summit) by Thomas Fedra.



- ... The Lessons ...
- Restaurant Branding and Company Branding Are Built on the Creation of a 'Good Story'
 - Customers Will Pay for a Good Story:
 - With Greater Frequency
 - With Increased Loyalty
 - Accepting Higher Prices
 - Leaders are:
 - Changing Agents
 - Visionary
 - 'Servants'
 - Customer Trust comes from:
 - Flawless Execution
 - Distinctive Products & Services
 - Focused Symbolic Imagery
 - Restaurants are Retailers of Time.
 - Convenience & Value Are Defined by Consumers.
 - Nothing Works unless One Believes in It.
 - Who Will Lead?
 - The Better Story Tellers
 - The Visionary Change Agents
 - The Allies of 'Generation D'
 - The Legendary Brand Partners
 - The Radical Pioneers
 - Global Trends:
 - Desire for Fast Casual
 - Targeting the Single Adult Female
 - Frantic Focusing on Talent Retention
 - The Reawakening of 'Environmental Design & Psychology'
 - Concession by the Baby Boomers of the Internet to 'Generation D'
 - Be Ready to Question!



1st European Foodservice Summit

Think Tank and Congress for the Restaurant Industry



2nd European Foodservice Summit

Think Tank and Congress for the Restaurant Industry

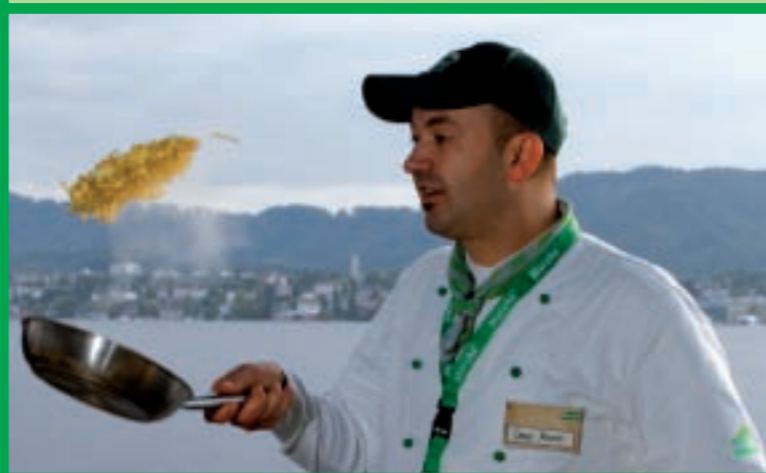
- ... The Lessons ...
- Gaining a Temporary Monopoly Has Become a Vital Corporate Requirement.
 - The Primary Function of Branding is Reduction of Uncertainty.
 - Fresh Is the Most Powerful Word on Menus today.
 - Restaurants Become the Second Kitchen, the Second Living Room and the Second Apartment.
 - The Euro Customer Does not Exist. We Are Facing a World of Growing Differences and Growing Similarities.
 - The End of Market Share: Competitiveness in the Future Foodservice World Is all about Time-share, Leisure-share and Stomach-share.
 - Time Becomes the Ultimate Currency of the Future.
 - There is a Growing Need to Be Consumer Centric. One Size, One Taste, One Product for a Mass Market Is no Longer Good Enough.
 - In the Past, People Lived their Lives by Chance. Today, We Live our Lives by Choice.
 - We Know More than We Can Say. Tacit Knowledge Is Probably the Most Important Source of Innovation.
 - Hire Senior People, they Add Value.
 - Working Women Are Crucial Drivers of Change.
 - Consumers' Question Is not any More: What Am I Going to Eat Today? But: How am I Going to Eat Today?
 - Quick Casual: a Category Nobody Yet Owns.





Food Magicians

The location – Lake Zurich – is the same every year. On stage or, to be more precise, the foredeck is the ensemble from Marché International. And the much admired star of the evening is food, very, very fresh food. Prepared from scratch, grilled, roasted, smoked or otherwise cooked ... Last September, this spectacular culinary production once again captured the attention of participants of the European Foodservice Summit during the boat trip to round off the first day. And, as ever, it was intensive pleasure for all the senses. State of the art catering by professionals for professionals – uplifting and refreshingly rustic: a cult feature of the Summit infotainment package. This year, the high-grade international congress for the foodservice sector is being held from 23 (optional Restaurant Tour/Get Together) to 25 September, as always in Zurich and for the 10th time running. www.marche-international.ch, www.efss.ch



2006: FUTURE STRATEGIES FOR BUILDING CULTURE, DEVELOPING PEOPLE, MANAGING GROWTH

CEO Panel

Cliff Burrows, Starbucks
 Karl Fritz, McCafé
 Vanessa Kullmann, Balzac Coffee
 Ricardo Rodriguez, Jamaica



Ralph Krueger
 Christopher Hart

... The Lessons ...

1. 'Discontinuous Innovation' Knows no Time, no Master Plan
2. Culture Conflicts = Opportunities
3. Three Layers of Technology Interface to Balance:
 - Substitution
 - Displacement
 - Complementarity
4. Restaurant Design is Moving from 'Public Living Room' to 'Public Apartment'
5. Customers Seek:
 - Fit Bodies
 - To Look Good
 - To Be Living Healthy
6. Restaurant Customers Want More and More to Be Entertained as Well as Being Fed
7. Are You the Manager Your Employees Would Call 'Great'?
8. 'Chi Va Piano Va Sano e Lontano.'
9. 'Men Like to Go where Women Are, not the other Way around.'
10. 'Food Is Integral to the Design & Design Allows the Food to Speak for Itself.'
11. Brands Have to React to Emerging Trends to Remain Relevant
12. Using Technology Means Finding the 'Human Anti-depressant'
13. Technology is the Application of Science to Commerce and Business (Including Behavioral Science)
14. Make Your Restaurant a 'Trust Factory'
15. If You Don't Have an Idea, Rent One!
16. Find the Five Strands:
 - Positive Process
 - Team Player
 - Reach Beyond Your Grasp
 - Execute Like a Champion
 - Be in the Moment

7th European Foodservice Summit

Think Tank and Congress for the Restaurant Industry



Cesar Brea



Vanessa Kullmann



Karl Fritz



Kent Hahne



Simon Threadkell



Guillermo Moreno



Cliff Burrows



2007: CHANGE THE CONVERSATION WITH THE CUSTOMER



Louis Le Duff



Jon Luther



Alain Coumont



Andrew Lynch

8th European Foodservice Summit

Think Tank and Congress for the Restaurant Industry



Dr. G. Clotaire Rapaille



Andreas Karlsson



Henry McGovern



Tony Hughes



Paul Bringmann

... The Lessons ...

1. Competitive spending spurs new markets
2. Grasp the power of fresh
3. Connect with the discovery mindset to give your business a competitive advantage
4. Big bold flavours are replacing rich, creamy and heavy; foreign foods don't have to be authentic to inspire
5. Look for perceived healthful options
6. (New) Beverages are increasingly considered as 'liquid foods'
7. Green is the new black, worldwide
8. Communal tables help both singles and seniors to reconnect
9. People spend more and more time out and hand-held foods match that lifestyle
10. When integrated with products and brands, design sells
11. Customers need to be advised and guided like children
12. Great taste – in food, ambience, service – is no longer an option; it is a competitive requirement
13. Brand consistency = design, menu and talent management
14. Have excellent and expanding expectations of your people's current abilities and future potential
15. Find your own village of origin; build on the culture of your brand tribe
16. Keep your cash flow greater than your ego



Franco Costa



Robert Brozin



Spiridon Soukas



Lori Ann Daytner



John Vincent



Hanns Hatt



Walter Seib



Jim Parker



Kim Rahbek Hansen



Gretel Weiss

9th European Foodservice Summit

Think Tank and Congress for the Restaurant Industry

■■■ Bites for Thought ■■■■■■

– Essentials from the 9th European Foodservice Summit –

- 1 Is Food the New Oil?
- 2 'Prime Costs' Mirror the Quality of Life
- 3 Great Performers Are Great Operators
- 4 There is No Tomorrow Without Training
- 5 It's the People Who Make the Chicken
- 6 Great Brands Are Built From the Inside Out
- 7 Prepare Now for 'The Cloud' of the One Machine
- 8 Look for the Reconciliation of Your 'Physical' and 'Online' Brand
- 9 Google Isn't a Search Engine, It's a 'Find' Engine
- 10 ROPO: Research Online Purchase Offline
- 11 Digital 'Immigrants' vs. Digital 'Natives'
- 12 If You Have Business During the Week, And On Weekends, And at Night, "It Helps"
- 13 Performance is Cheaper Than Advertising
- 14 Employees Who Enjoy Their Work Do a Better Job
- 15 Frontline Level Leadership
- 16 1. Employee, 2. Customer, 3. Shareholder
- 17 Those Who Own the Oil Own the Nations. Those Who Own the Food Own Humanity
- 18 Trust the Supplier vs. I Need to Know
- 19 Buy Wisely, Cook Carefully, Eat it All
- 20 The Right Attitude Turns Average into Great
- 21 Welcome to The Age of Hyper-Authenticity
- 22 We Are Closer to September 2015 Than We Are to Sept. 2001

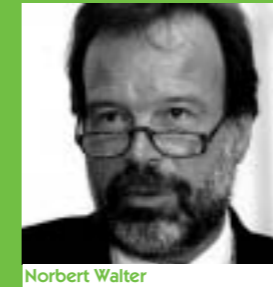


10th European Foodservice Summit

Think Tank and Congress for the Restaurant Industry



Morten Solberg Nilsen



Norbert Walter



David Bosshart



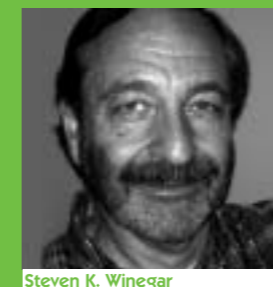
Christopher C. Muller



Jochen Pinsker



Kevin Todd



Steven K. Winegar



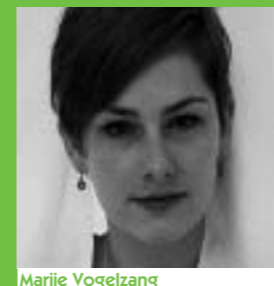
Marcus Cload



Kjell A. Nordström



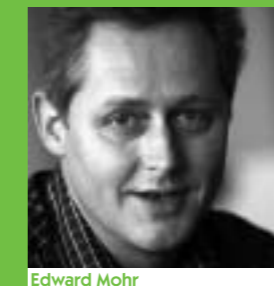
Christian Gansch



Marije Vogelzang



James Woodbridge



Edward Mohr



Gretel Weiss



Mikhail Goncharov



www.efss.ch



Educational partners



The Coca-Cola Company is the world's largest beverage company and Coca-Cola is recognized as the world's best-known brand. Through the most widespread distribution system in the world, consumers in more than 200 countries enjoy the Company's beverages.
www.cocacola.com



Duni enhances atmosphere and brings convenience to any eating and drinking occasion by providing inspiring and innovative products and concepts for table-setting, meal-service and take-away. The Duni brand is sold in more than 40 markets and enjoys a number one position in Central and Northern Europe.
www.duni.com



A synonym of quality coffee. The Company is Italian "by birth", founded in Turin in 1895. Thanks to its cosmopolitan appeal, today Lavazza (beans & machines) is present in more than 90 countries worldwide.
www.lavazza.it



Impulses . Success . Emotions -
For professionals from professionals
www.salomon-foodworld.com



Foodservice and hospitality markets in nearly 170 countries rely on our 22,000 associates to keep their operations clean and sanitary. Innovative and unparalleled custom cleaning programs, and effective problem-solving relationships are our prime objectives. We will take on your toughest problems and solve them. 'Delivering peace of mind' - that's the Ecolab difference.
www.ecolab.com

winterhalter

Winterhalter is a complete system solution provider for warewashers, detergent products, water treatment and accessories, as well as being an acknowledged specialist for glasswashing all around the world. The machine portfolio of Winterhalter ranges from compact glasswashing and dishwashing machines up to multi-tank flight-type or rack conveyor dishwashers.
www.winterhalter.biz



METRO Cash & Carry is internationally leading in self-service wholesale, operating more than 620 stores in 29 countries. As partner for professionals we offer our customers a large choice of top quality products all under one roof.
www.metro-cc.com



Nestlé Professional is an inspiring growth partner that delivers creative, branded Food and Beverage solutions, enabling operators to innovate and delight their consumers.
www.nestleprofessional.com



Barilla FoodService has been created to offer specific solutions for the restaurant sector, and has become a great international reality. This success is the result of our dedication to positioning ourselves on the market as "The Pasta Solutions Specialist", which finds its full expression today in our Pasta Meal Point's, a synergy of five winning elements: product, process, equipment, branding and service.
www.barillafoodservice.com