

ELEMENTARY
& SECONDARY
SEGMENT
PROFILE

- Operator under strict USDA reimbursement structure, nutrition regulations & documentation requirements driving tight cost parameters & high administrative burden
- A captive audience of students (<18) who's parents demand a consistent quality experience
- Operate in pre-set daypart time windows

TRENDS SHAPING THE FUTURE OF ELEMENTARY & SECONDARY

01 SERVICE MODEL
Consumer Engagement

- Culturally Diverse Menus, within USDA Regulations
 - More Community & Local Engagement
 - Expanded/Collaborative Nutrition Education in the Classroom/Cafeteria
 - Greater Personalized Dining Experiences, Including After-hours Feeding & Grab 'n Go
 - More Automated Ordering & Self-Service
 - Broader Multi-Faceted Customized Consumer Digital Engagement
 - Expanded & Optimized Off-premise Service Options
 - Expanded Data Analytics
- Commercial/Collegiate Food Courts

02 PRODUCTION MODEL
Back-of-House Operation

- Greater Cross-Utilization of Staff
- More Locally Sourced Ingredients
- Decreased Complexity, Greater Efficiency
- Greater Adoption of Sustainable Products & Practices
- Smaller More Flexible Kitchens for Broader Efficiency, Food Safety, and Energy Savings
- Greater Assembly, Smart-Scratch, Increased Use of External Centralized Production
- Optimized Use of RTU / Plus-One / Frozen / Pre-Cooked / Pre-Prepped Ingredients
- More Online & At-station Training
- More Digital, Smart Connected Equipment
- Greater Use of College Students as a Labor Source

03 SUPPLY CHAIN
& Supplier Interaction

- Increased Education for Suppliers on How the USDA Works in this Segment, Leading to Improved Collaboration
- Continued Supply Chain Risk and Expanded Tactics to Minimize
- Greater Reliability, Trust & Transparency
- Better Communication & Visibility/Traceability Throughout Value Chain
- Improved Data Standardization
- Greater Use of Predictive Analytics
- Enhanced Food Safety & QA Mapping
- Importance of Sustainability/ESG as a Choice Criteria



TOTAL OPERATION
Cut Across 1, 2, & 3

- Greater Collaboration with the USDA, Suppliers and K-12 Operators to Standardize, Simplify and Streamline Regulation, Funding and Processes
- Expanded Employee Engagement, Retention, Culture, Diversity and Inclusion
- Re-Imagined Allocation of Human Labor for Efficiency & Maximum ROI
- Greater Adoption of Technologies & Systems Across the Business Model

**COLLEGE & UNIVERSITY
SEGMENT
PROFILE**

- Diverse operations covering many FS segments – casual, QSR, c-store, cafeteria, fine dining, catering
- A range of financial operating models
- Diverse clientele ranging in age from 18-100
- A consistent customer base, 3 meals day/7 days a week
- Highly aware & demanding customer seeking a broad range of foods, global flavors, health & nutritional profiles, sustainability characteristics and mobile options

TRENDS SHAPING THE FUTURE OF COLLEGE & UNIVERSITY

01 SERVICE MODEL
Consumer Engagement

- **Highly Differentiated & Targeted Menus**
- **More Engagement with Customer Base and Campus Community**
- **Greater Consumer Engagement Around Sustainability**
- **Global Influence Towards Differentiated & Targeted Menus**
- **Expanded Data Analytics**
- **Anticipate Consumer Needs vs. Adapt to Them**
- **Broader Multi-Faceted Customized Consumer Digital Engagement**
- **More Automated Ordering & Self-Service**
- **Highly Differentiated & Targeted Menus**
- **Differentiated /Targeted Menus on Campus**
- **Diversity of Population and Staff**
- **Expanded & Optimized Off-premise Service Options**

02 PRODUCTION MODEL
Back-of-House Operation

- **Comprehensive Nutritional & Data Information**
- **Decreased Complexity, Greater Efficiency**
- **Greater Cross-Utilization of Staff**
- **More Responsibly Sourced Ingredients**
- **Adoption of Sustainable Products & Practices**
- **Focus on Allergen Ingredient Identification and Training Tools for Culinary Team**
- **Smaller More Flexible Kitchens**
- **Greater Assembly, Less Scratch, Increased Use of External Centralized Production, Additional Processed Food**
- **More Online & At-station Training**
- **More Digital, Smart Connected Equipment**
- **Pre-Consumer Food Waste Reduction**
- **More Allergen Free Products**

03 SUPPLY CHAIN
& Supplier Interaction

- **Continued Supply Chain Risk and Expanded Tactics to Minimize**
- **Increased Collaboration and Partnership with Suppliers on New Product Research and Development**
- **Greater Reliability & Trust**
- **Better Communication & Visibility/ Traceability Throughout Value Chain**
- **Greater Use of Predictive Analytics**
- **Improved Product Data Standardization**
- **Importance of Sustainability/ESG as a Choice Criteria**
- **Increased Collaboration, Education & Accountability with Suppliers**



TOTAL OPERATION
Cut Across 1, 2, & 3

- **Expanded Employee Engagement, Retention, Culture, Diversity, Equity and Inclusion**
- **Innovation in attracting talent**
- **Greater Adoption of Automation, Technologies & Systems Across the Business Model**
- **Re-Imagined Allocation of Human Labor for Efficiency & Maximum ROI**
- **Cross-Utilization of data**

HEALTHCARE
 SEGMENT
 PROFILE

- Cafeteria, staff, catering & patient dining experience in hospitals, resident dining and senior living
- Operating under strict budgets and strict standards (menu & labor) differing by local, state and federal guidelines
- Diverse customer base includes patients/residents with a variety of specific dietary/nutritional needs, diminished mobility/sight abilities, and high/low engagement
- Strong focus on infection control, health & wellness and sustainability

TRENDS SHAPING THE FUTURE OF HEALTHCARE

01 SERVICE MODEL
 Consumer Engagement

- Greater Customer Service Training & Improved Patient/Non-patient/Resident Experience
- Lower Cost Nutritionally-Flexible Menus that Maximize both Patient-Based and Retail-Based Customers
- Broader Multi-Faceted Customized Consumer Digital Engagement
- Expanded Data Analytics
- More Automated Ordering & Self-Service
- More Community & Local Engagement

02 PRODUCTION MODEL
 Back-of-House Operation

- Greater Cross-Utilization & Training of Staff
- Decreased Complexity, Greater Efficiency
- More Online & At-station Training
- Greater Adoption of Sustainable Products & Practices
- More Digital, Energy Efficient, Smart Connected Equipment and Optimized Technology for Menu & Waste Tracking, Purchasing, and Labor Management
- Greater Assembly, Less Scratch, Increased Use of External Centralized Production
- Optimized Use of RTU / Plus-One / Frozen / Pre-Cooked / Pre-Prepped Ingredients
- Smaller More Flexible Kitchens
- Reduced Carbon Footprint

03 SUPPLY CHAIN
 & Supplier Interaction

- Increased Collaboration, Trust, Education & Accountability with Suppliers
- Better Communication & Visibility/ Traceability Throughout Value Chain
- Improved Product Data Standardization
- Greater Use of Predictive Analytics
- Continued Supply Chain Risk and Expanded Tactics to Minimize
- Enhanced Food Safety & QA Mapping
- Importance of Sustainability/ESG as a Choice Criteria



TOTAL OPERATION
 Cut Across 1, 2, & 3

- Heightened Focus on Cost Management & Price/Margin Maximization
- Expanded Employee Engagement, Retention, Culture, Diversity and Inclusion
- Re-Imagined Allocation of Human Labor for Efficiency & Maximum ROI
- Greater Adoption of Automation, Technologies & Systems Across the Business Model

**BUSINESS
& INDUSTRY
SEGMENT
PROFILE**

- On-site cafes, dining, catering, grab 'n go for offices, manufacturing and warehouses
- Typically, highly demanding diverse customer with resources/power to impact change
- High utilization of contract management companies with the resources and expertise to deliver the variety and experience for the client
- Captive audience in some cases
- Uncertainty/flexibility of daily on-site population

TRENDS SHAPING THE FUTURE OF BUSINESS & INDUSTRY

01 SERVICE MODEL
Consumer Engagement

- **Highly Differentiated, Targeted & Flexible Concepts that Rotate**
- **Expanded Data Analytics**
- **Desire for Better Quality and Faster Speed of Service**
- More Community & Local Engagement
- Improved Customer Service and Experience
- Broader Multi-Faceted Customized Consumer Digital Engagement
- Expanded & Optimized Off-premise Service Options
- More Automated Ordering & Self-Service

02 PRODUCTION MODEL
Back-of-House Operation

- **Greater Adoption of Sustainable Products & Practices**
- **Optimized Technology for Menu and Waste Tracking, Prep, Purchasing, and Labor Scheduling/Management**
- **Greater Cross-Utilization of Staff**
- **Smaller More Flexible and Efficient Kitchens**
- **Decreased Complexity, Greater Efficiency**
- Greater Assembly, Less Scratch, Increased Use of External Centralized Production
- Optimized Use of RTU / Plus-One / Frozen / Pre-Cooked / Pre-Prepped Ingredients
- More Online & At-station Training
- More On-site Training, in Multiple Languages

03 SUPPLY CHAIN
& Supplier Interaction

- **Importance of Sustainability/ESG as a Choice Criteria**
- **Better Communication & Visibility/ Traceability Throughout Value Chain**
- **Increased Collaboration, Education & Accountability with Suppliers**
- Greater Use of Predictive Analytics
- Continued Supply Chain Risk & Expanded Tactics to Minimize
- Greater Reliability & Trust
- Improved Data Standardization
- Enhanced Food Safety & QA Mapping



TOTAL OPERATION
Cut Across 1, 2, & 3

- **Expanded Employee Engagement, Retention, Culture, Diversity and Inclusion**
- Greater Adoption of Automation, Technologies & Systems Across the Business Model
- Re-Imagined Allocation of Human Labor for Efficiency & Maximum ROI

**RESTAURANT
 SEGMENT
 PROFILE**

- Stand-alone, independent & chain, for-profit restaurant operations
- Representing diverse segments: QSR, Fast-casual, midscale, family casual, polished casual & fine dining

TRENDS SHAPING THE FUTURE OF RESTAURANTS

01 SERVICE MODEL
 Consumer Engagement

- Expanded & Optimized Off-premise Service Options
- More Multi-Faceted Consumer Digital Engagement & Automated Ordering & Self-Service
- More Targeted, Personal In-store /At-Home Experience
- Expanded Data Analytics
- Highly Differentiated & Targeted Menus
- More Community & Local Engagement

02 PRODUCTION MODEL
 Back-of-House Operation

- Decreased Complexity, Greater Efficiency
- Greater Cross-Utilization of Staff
- Better Use of BOH, Greater Throughput, More Storage
- Optimized Mix of Scratch / RTU / Plus-One / Frozen / Pre-Cooked / Pre-Prepped Ingredients
- More Locally Sourced Ingredients
- More Online & At-station Training
- More Digital, Smart Connected Equipment
- Adoption of Sustainable Products & Practices

03 SUPPLY CHAIN
 & Supplier Interaction

- Better Communication & Visibility/ Traceability Throughout Value Chain
- Continued Supply Chain Risk and Expanded Tactics to Minimize
- Improved Data Standardization
- Increased Collaboration, Education & Accountability with Distributor/Suppliers
- Greater Reliability & Trust in the Supply Chain
- Greater Use of Predictive Analytics
- Enhanced Food Safety & QA Mapping
- Importance of Sustainability/ESG as a choice criteria



TOTAL OPERATION
 Cut Across 1, 2, & 3

- Expanded Employee Engagement, Retention, Culture, Diversity and Inclusion
- Heightened Focus on Cost Management & Price/Margin Maximization
- Re-Imagined Allocation of Human Labor for Efficiency & Maximum ROI
- Greater Adoption of Automation, Technologies & Systems Across the Business Model