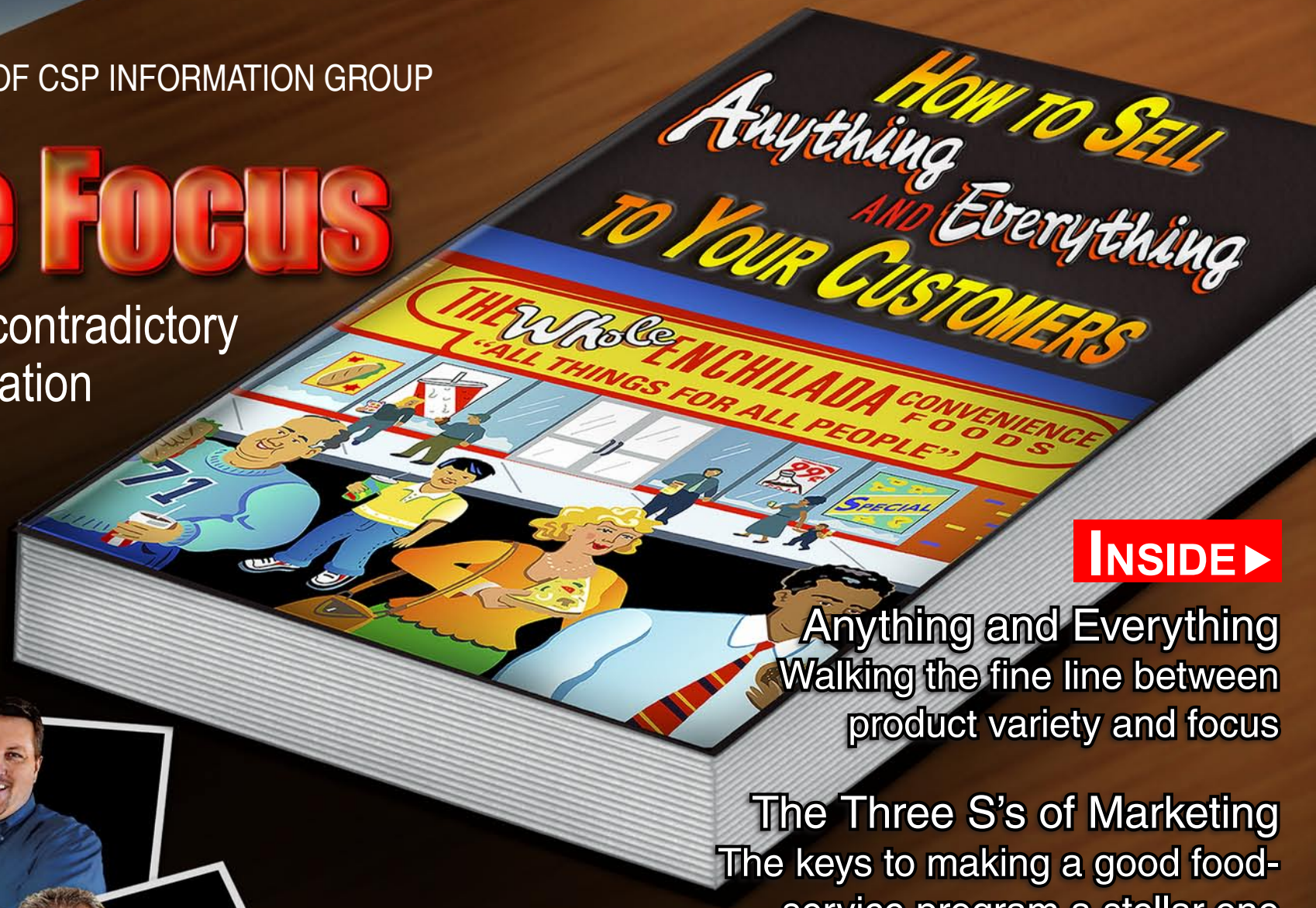


Foodservice Focus

Foodservice success is about two contradictory concepts: variety and specialization



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Walking the fine line between
product variety and focus

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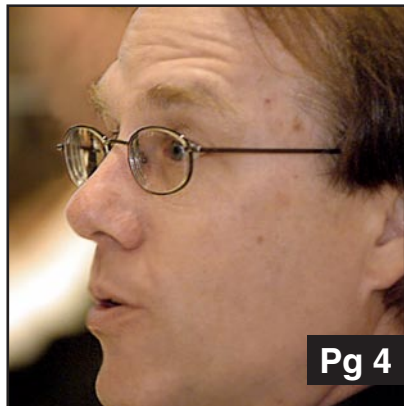
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FEEDBACK



Anything AND Everything

Foodservice success is about two seemingly contradictory concepts: variety and specialization.

—By Paul Rogers



C-stores need to walk a fine line between meeting the demands of multiple customers while establishing themselves as a destination for a particular food specialty — be that pizza, chicken, toasted subs or anything else. Such was the verdict at the 2005 CSP/Convenience Insights Foodservice Benchmarking Study & Forum in Chicago recently.

Foodservice customers visit the store in groups and rarely want the same breakfast or lunch choices, said one retailer who runs a commissary, several in-store [Subway](#) outlets and a roller grill program. “We’re seeing the combination of products lift sales,” he said. “You need to satisfy all kinds of needs.”

[Circle K](#) has had a “very strong” roller grill program for the last year and a half, according to Sandra Mejorado, category manager. “One [product] plays off of the other,” she said.

When it comes to the roller grill, retailers worried about cannibalization need not fret, forum attendees said. Putting new products on the roller grill actually brings more attention to it — so much so that many retailers are adding a second grill, said Mark Ka-

min, director of foodservice for Kraft Foods, Inc.

“It’s actually made the roller grill area more of a destination than before,” Kamin said. “We’ve seen our sales continue to grow even with new products coming out. In stores that have incorporated Subways, we’ve seen hot dog sales grow. Even though Subway is a quick-service restaurant, often-times in the middle of the day, there might be lines. The roller grill is self-

serve, so customers can walk over and grab a hot dog.”

Or they can grab French toast or chorizo-and-egg products that have proven to be winners for c-store retailers at the forum.

“Too many operators take the one-size-fits-all approach.”

— Greg Dean
Circle K

Similar variety is driving the dispensed beverage sector. Cappuccino, espresso and flavored coffees and creamers are driving the hot beverage side of the business. And for the fountain, respondents to the Convenience Insights survey ranked non-carbs with the highest growth potential.

Based on what’s happening on the bottle and can side, the high ranking for non-carb makes a lot of sense, said Ken Friedlander, senior manager of retail fountain strategy for [PepsiCo](#). “That’s driving opinions when it comes

▼ Ken Friedlander of PepsiCo discussed retailers' need to remain focused on the products driving business at the fountain and the challenge of adding non-carbonated products to smaller fountain offers.



▼ Kathy Mejia of BP North America described the challenge convenience retailers face in working with foodservice specialist distributors given the channel's moderate fresh food sales volume.



to non-carbs.” But the limited number of valves makes non-carb expansion difficult.

“The fact is that the business is your Pepsi, Mountain Dew, Diet Pepsi and Sierra Mist, your colas and lemon-limes,” said Friedlander. “A lot of stores still have eight valves, so you have to weigh the benefits of adding a non-carb. I would not recommend taking a Pepsi or Diet Pepsi or Mountain Dew off because the growth spurt right now is in non-carbs. It wouldn’t make good business sense.”

Some stores are adding a separate non-carb valve on the side of the fountain. No solution — at the fountain, at the coffee bar, at the sandwich counter — is right for everyone.

“Too many operators take the one-size-fits-all approach,” said Greg Dean, director of foodservice for Circle K’s Southeast region. “Stores are different, sites are different, demographics are different. You have to take a different approach to how you merchandise — what sizes, what offerings you have. If you can get down to that [store] level, you can take your program to the next step.”

C-stores also battle limitations to product variety that ordinary foodservice businesses may not have to face, chief among them distribution. Forum attendees said a better model for foodservice distribution is needed.

“We would like to use a foodservice specialist distributor, but the problem is you need to have very high volume.”

**— Kathy Mejia
BP North America**

“We would like to use a foodservice specialist distributor, but the problem is you need to have very high volume,” said Kathy Mejia, manager of office and formats for BP North America’s [am/pm](#) stores. “If you’re starting out, you don’t have volume — and if you do have volume, the cost is still very high. If you want fresh produce, you need deliveries three or four times per week. And if you do that, it’s extremely costly.”

One of the few solutions is self-distribution. One retailer who opened his own warehouse earlier this year said the results have been encouraging. “We’ve had some teething issues and it doesn’t serve all of our states, but it does serve more than half. It goes a long ways toward solving the issue,” the company’s foodservice category manager said.

Self-distribution has its own set of hurdles, including getting key manufacturers to buy into it. Fortunately, forum attendees said, some manufacturers are becoming

more receptive to the idea than they have been in the past.

Mejia believes retailers can solve the problem themselves by working together: “We do ourselves a disservice by not helping the entire industry get our costs down. If we work together and share certain proprietary systems, we’ll grow healthy together.” ■



▲ Video: Phil Oliver of Fas Mart Convenience Stores discusses his chain’s approach to product variety and meeting the varying needs of customers.

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The Three S's of Marketing

Sampling, sports and spectacle put a charge into c-store foodservice sales

There are countless methods to market and promote a foodservice business — billboards, combo deals, point-of-sale signage, etc. — but at the [2005 Convenience Insights Foodservice Benchmarking Study & Forum](#), three stood out: sports, sampling and spectacle.

Sports tie-ins are big, said the category manager of one major c-store chain. The company gives away cups

“Fifty-four-thousand is significantly more than we’d usually sell,” the category manager said. “What we wondered was whether we could sustain the lift after the game. What we have found so far is that our business was actually up over the last year, when there’s normally a seasonal downward trend in coffee sales.”

As part of the deal, the retailer’s logo is “all over” the arena, getting

Sampling may not bring people into stores like a free coffee giveaway, but it could get them to try a new product line and tempt them to buy in the future. The drawback is that sampling is difficult.

of coffee from 6 a.m.-10 a.m. the day after the hometown professional football or basketball franchise posts a victory (not all victories; giveaway games are specified). One playoff basketball game this year resulted in 54,000 cups being handed out free.

exposure with fans at the stadium and ample TV coverage.

“We’re bringing a lot of new people into the store. Very early on when we first started doing it, people would run in, get their coffee and leave. Now



▲ Circle K Category Manager Sandra Mejorado said product sampling programs work well, but can be difficult to staff and execute

we’re finding they’re slowing down and spending a dollar on a pastry or spending a couple of bucks on a pack of cigarettes or other things in the store,” the category manager noted.

Fifty-four-thousand cups is a lot of coffee from a cost standpoint, but compared to other types of advertising, it’s relatively inexpensive and offers great exposure, forum attendees agreed.

Sampling may not bring people into stores like a free coffee giveaway, but it could get them to try a new product line and tempt them to buy in the future. The drawback is that sampling is difficult. It requires additional labor that c-stores normally lack — or if they do

have personnel, those people usually are not trained to interact with customers the way a sampling program requires.

Some c-stores look to outside help. [Circle K Stores, Inc.](#) tried sampling with its roller grill program.

“We had a heck of a time finding an outside company that could service all of our stores,” said Sandra Mejorado, category manager. “When we did, they subbed it out to other people, so it was a nightmare of execution. Then we switched to doing it in-house, and we had labor costs. In stores where we were able to pull it off, it was wonderful. We got a lot of customer feedback and it’s definitely something that we

► Scott Svihula of FETCO said tea drinkers tend to be more aware of product presentation and are less apt to buy if presentation seems substandard.

▼ Steve Montgomery of [b2b Solutions, LLC](#) described Starbucks Coffee as “the theater of food.”



want to continue. It did work. But for our industry — we’re not [Costco](#) — we have more challenges.”

Most Forum attendees indicated they have an interest in sampling — Circle K Southeast uses a sampling company for large-scale roll-outs — but called for manufacturer



support to compensate for the extra labor required to execute.

For the third “S”, spectacle, much of the impact comes from equipment manufacturers and other suppliers. The same retailer giving away free coffee saw “tremendous lift” in fountain sales when the company tested a flavor shot fountain. One of the flavor shot models features flashing lights in different random patterns when a customer makes a selection.

“That actually seems like it’s attracting people,” the category manager said. “Flavor shots are a big deal.”

Flavor shot fountains (each featuring three syrups — cherry, vanilla and lemon or lime — are now standard for

any of the retailer’s remodels or new stores.

“The big thing it brings out is the-ater — that theater is making fountain drinks fun,” said Ken Friedlander, senior manager of retail fountain strategy for [PepsiCo](#). FCBs are heavily reliant on presentation as well, with supplies like clear cups and colored straws to enhance a customer’s drinking experience, he added.

Spectacle, or simply presentation, can make or break foodservice sales.

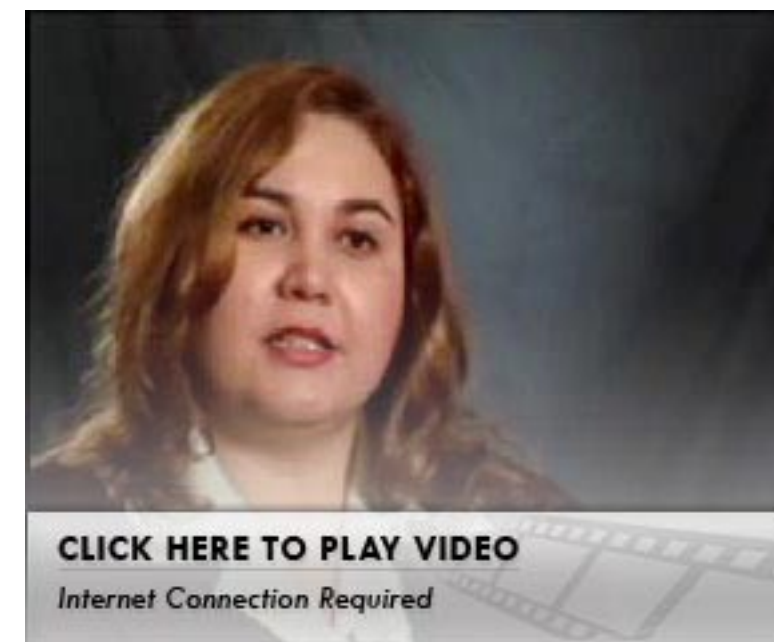
☛ “With salads, it all depends on presentation,” said Kathy Mejia, manager of office and formats for BP North America’s [am/pm](#) stores.

☛ “Tea drinkers are more educated and looking for presentation. If the presentation is not there, they’re not going to think it’s quality tea,” said Scott Svihula, director of marketing for [FETCO](#). ☛ “[Starbucks](#) is all presentation. It’s the theater of food,” said Steve Montgomery, president of b2b Solutions LLC.

“We’re in a really interesting time and being challenged by customers in a way we haven’t been in the past. Consumers are not only more educated about coffee, they’re more educated about everything in the store. Blank Angus beef didn’t mean anything a couple of years ago; today it does,” said one category

manager. “They’re concerned about health, they’re concerned about food safety. We’re going to be more and more challenged to deliver to customers’ expectations. We can’t just sell a 99-cent sandwich anymore.” ■

“We’re going to be more and more challenged to deliver to customers’ expectations. We just can’t sell a 99-cent sandwich anymore.”



▲ **Video: Circle K’s Sandra Mejorado and Greg Dean discuss sampling and specialty coffee programs.**

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Brewing Up New Sales

Coffee is king of dispensed beverages, but c-store operators look to add a few more jewels to the crown.



No one will dispute the positive effect Starbucks has had on c-store coffee sales. But c-store operators believe coffee has even better days ahead. In fact, they rated coffee as the dispensed beverage with the best growth potential, according to the [2005 Convenience](#)

“A branded coffee program is far superior to an unbranded coffee program.”

— Scott Svihula
FETCO

[Insights Annual Benchmarking Study & Forum.](#)

The reasons for optimism are many.

“We’re starting to see syrups get out into stores; we’re starting to see more varieties of creamers and other ancillary items that allow customers more

variety,” said Kathy Mejia, manager of office and formats for BP North America’s [am/pm](#) stores. The flavors feed preferences of younger drinkers. “If [younger consumers] drink coffee, it’ll be milk-based,” she added.

“The mixology that’s going on today is driving a lot of people to experience coffee for the first time,” added Peter Doyle, national convenience store manager for [Mother Parkers Tea & Coffee](#). “They might try a vanilla cappuccino and then graduate to a straight coffee flavor.”

C-stores are also doing a better job of merchandising. “It’s as much about presentation and how you deliver it to the consumer as it is about variety,” Doyle said. “Presentation gives the impression of higher quality.”

“Everything has to be in the right place: the cups, the lids, the napkins. If you lay things out in the right way, with some forethought, you can drive volume,” said Larry Miller, vice president and general manager with [Duke Convenience Group](#). Duke experimented with the same brands, same

coffee, same equipment, laid out in different ways, and saw volume shifts depending on the design.

One rule is universal though: “A branded coffee program is far superior to an unbranded coffee program. Consumers feel they are getting a fresher cup of coffee,” said Scott Svihula, director of marketing for [FETCO](#). A branded concept includes everything from the signage to the look of the cup to the sleeve to an “explanation of the coffee — not just Kona, but what Kona is,” he said.

The challenge is to take coffee to the next step. Many believe that step is espresso, after the success seen at [Dunkin’ Donuts](#) with espresso over the past year.

“It’s been a huge, huge success, and the point is that a lot of people drink espresso, not just the guy at [Starbucks](#),” Doyle said.

Earlier this year, [Circle K](#) Southeast opened its first site offering espresso. The espresso machine is fully automated, except for the steaming of the milk. The Circle K store’s design also seems to aid in the sale of espresso and coffee products.

“It doesn’t look like a typical convenience store. It’s got a coffeehouse feel — off to the side, with seating,” said Greg Dean, director of foodservice for Circle K Southeast. “I don’t think you can just drop an espresso machine into a convenience store. Even with Dunkin’ Donuts — it’s not Starbucks, but you’re still having the drink prepared for you. There’s still that labor component that we’ve got to get beyond. Although it may not be the same level of execution as a Starbucks, there is still the theater, there’s still the theme, there’s still that impression that I’m having it made for me.”

Dunkin’ Donuts had another advantage in starting its espresso operation: They built their reputation on regular coffee.

“Dunkin’ Donuts can get into almost anything with coffee,” Mejia said. “They’ve had incredible coffee forever. We need that credibility with consumers. As we build that credibility base, we can get into programs like espresso.” ■

► Peter Doyle of Mother Parkers Tea & Coffee said he believes the popularity of new coffee beverages are introducing consumers to coffee for the first time.



Be Careful What You Hear

When it comes to healthy eating, c-store customers' rhetoric doesn't necessarily match their buying habits.

“What people say they buy and what they actually buy is totally different.”



◀ Phil Oliver of Fas Mart Convenience Stores said despite consumers talk of eating healthy, his stores are selling more fried chicken than ever.

“Health-conscious eating may not be a part of food-service buying.”



◀ Greg Dean of Circle K pointed out that consumers eating out may be doing so for reasons that run counter to their interest in eating healthy.

Health fads sweep the food industry practically yearly. The media trumpets them and manufacturers pounce on them, eager to meet newfound demand. Unfortunately for those in the food retail sector, consumer buying habits don't always live up to the hype. That certainly is the case for c-store foodservice operators, according to attendees at the [2005 Convenience Insights Annual Foodservice Benchmarking Study & Forum](#).

“People keep saying healthy, healthy, healthy, but we're still seeing a ton of [fried] chicken sell, and we're looking to expand the program,” said Phil Oliver, category manager with [Fas Mart Convenience Stores](#). “It's unbelievable that we hear all this, but what people say they buy and what they actually buy is totally different.”

One problem is that it isn't easy to discern a legitimate long-term diet trend from a flash in the pan. In the 2004 Convenience Insights benchmarking study, 44 percent of respondents listed low-carb as a growth opportunity. In 2005, that number fell to 6 percent.

This year, the food industry has shifted its attention to the next potentially big thing: whole grains (which rated No. 1 in growth potential for healthy foodservice, according to c-store retailers).

“The energy behind whole grains is taking the place of low-carb,” said Paul Bischoff director of business development, North America, for [Maple Leaf Bakery](#). About one-third of Maple Leaf's new product development centers on whole grain and multi-grain products.

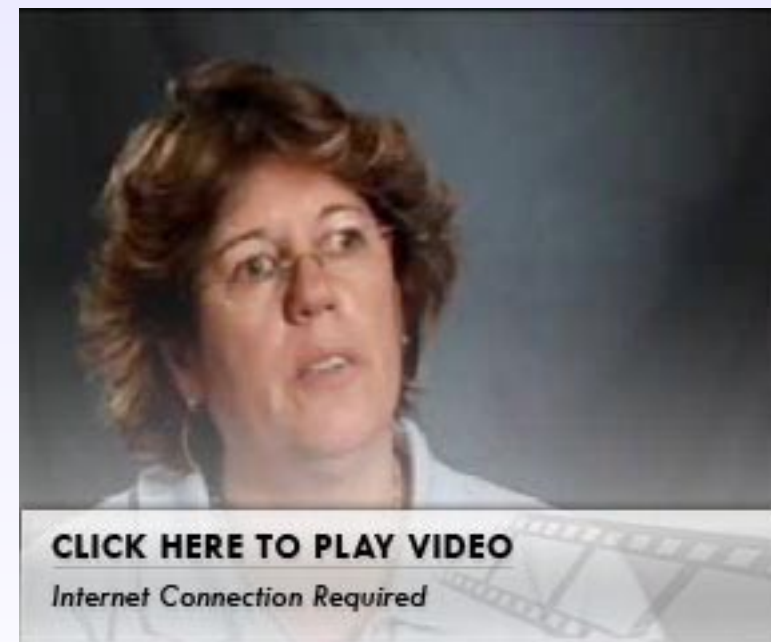
That said, Bischoff still believes the sector needs to be approached with caution: “The consumer has to give you permission to play in this category. ‘Bubba’ is not worried about the percentage of whole grain in his sandwich. But that new customer is chomping at the bit.”

“Instead of eating a sandwich with whole grain bread, they're eating chicken nuggets,” added Kathy Mejia, manager of office and formats for BP North America's [am/pm](#) stores. “People talk a good game, but when they get in the store, it's something different.”

But completely dismissing healthy foods as hype would be a mistake. One big reason: The difference between what a customer says and what he buys may not

be as yawning a chasm as one might think. C-stores need to understand what customers mean by healthy, Mejia said. Many are eating healthier — according to their own personal standards for “healthy food.”

“The manufacturers are going after that,” said Greg Dean, director of foodservice for [Circle K](#) Southeast. “But take a look at our stores. How many healthy alternative sections have come and gone or at least shrunk? When people go out to eat, they're usually eating on the go and wanting their food fast, or they're doing it as a treat. So maybe health-conscious eating isn't the main motivation on those occasions. It may not be part of foodservice buying.” ■



▲ Video: BP's Kathy Mejia and Fas Mart's Phil Oliver describe how consumers don't necessarily buy what they say they do when it comes to foodservice.

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▼ Scott Huggins of Tesoro Petroleum said he believes retailers need to be less concerned with waste during the first few months of a new foodservice program and focus on customer awareness.



▼ Larry Miller said too many retailers see spoilage early in a new program, call it a bust and pull it after six months or less. He told attendees to consider food-holding technologies now in use by major fast feeders.



Wasted Opportunity

C-store operators suggest avoiding any hasty decisions when tackling the topic of foodservice waste.

In a perfect world, every sandwich a c-store makes, every hot dog on the roller grill, will find its ways into a customer's stomach — while money finds its way into the cash drawer.

This is not a perfect world.

Any c-store foodservice program is going to produce waste. Behind labor costs and availability, food costs/waste ranked as the third biggest impediment to foodservice growth, according to the [2005 Convenience Insights Annual Benchmarking Study & Forum](#). A main message from those attending the forum: Don't let waste — or fear of it — be the factor that dissuades you from taking advantage of foodservice opportunities.

"You better be prepared to accept waste if you want to grow sales," said Rob Harmon, category manager for [BP Products North America](#). "You can't be margin driven or waste driven from the get-go."

And that's exactly where convenience retailers run into trouble. The fundamental challenge is the spoilage issue, said one major c-store foodservice category manager. "You've

got to get store managers to switch from the retail accounting method to a cost accounting mindset. They're very different."

The dangers of attributing too much significance to waste are especially relevant to stores just getting into foodservice or expanding existing foodservice operations. Forum attendees agreed patience is needed.

"Most companies give up before the customer knows [the product] is there."

"Most companies give up before the customer knows [the product] is there."

**— Larry Miller
Duke Convenience Group**

Six months into a program, they see spoilage, say it's a bust and pull out. That's not enough time," said Larry Miller, vice president and general manager with [Duke Convenience Group](#).

"It seems longer to executives because they've been working on it for at least six months prior to the program even being rolled out."

"As a company, you need to make a commitment that you will keep the program in the store no matter what," added Scott Huggins, national category manager of foodservice with [Tesoro Petroleum Co.](#) "Forget about waste for the first couple months. Concentrate on getting customers in and letting them know you're in the business."

Giving stores time to establish a food brand with consumers is only one way to address potential waste. Forum attendees also suggested smaller contracts, guarantee programs, limited menus (three types of salads, for example, rather than 10) and technology that extends shelf life while maintaining product quality and enhances appearance. C-stores need to look at other industries like QSRs that are

having some success with technologies for holding product, said Miller.

"We all think that [Burger King](#) is grilling burgers to order, but Burger King, [McDonald's](#), all of them, are now preparing products and holding them. There are new holding technologies that we as an industry can take from the QSR industry that are almost mind-boggling." ■

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