



Tony Keating

**Chairman SSP's International Rail Forum
Managing Director SSP UK Rail**

SSP

- Compass' Specialist Travel Catering Division
 - £1.7bn sales
 - Focuses on 3 main markets
 - Railway Stations
 - Airports
 - Roads



Channel	Units	Locations	Countries
Railway Stations	800	250	13
Airports	780	145	35
Motorways	-	140	10

SSP's International Station Catering Business

- 13 Countries including

Country	Units	Stations
UK	400	123
Germany	187	69
France	30	4
Sweden	18	3



(Plus 55 units RER & Metro)

And growing businesses in

Denmark	Norway	Spain	Switzerland
Portugal	Austria	Belgium	India (jv)

SSP UK Rail's Business

300% + Growth since 1992



Growth Driven By



- Compass Investment
- Research Customer Needs
- Brand Development



- Brands that customers love to use
- Not have to use

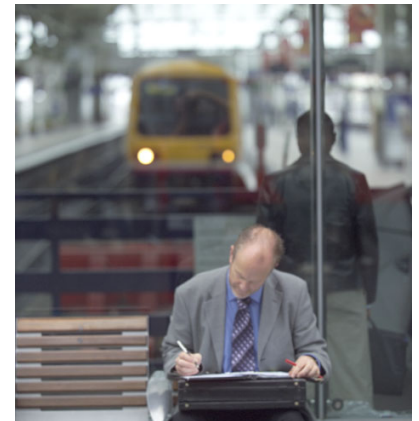
4 Key changes in Customers needs - UK

1. Increasing sophistication and demand for high quality

- Freshly Baked ... not baked yesterday
- Fresh Juices...not reconstituted
- Espresso based coffee not held warm coffee
- Etc

2. Busier Lives - increase in take-away / eat on the move - decline of Seated units

- Declining meal time
 - 36mins 2002
 - 27mins 2004
- Waterloo Station
 - 2 seated food units
 - 3 Bars
 - 14 Take – Away Food Unit



4 Key changes in Customers needs - UK

3. The Rise of the 'Coffee Shop'

- 15 year ago none on stations – today over 100
- Key Players – Starbucks, Costa Coffee, AMT, Caffe Ritazza



4. Growth of Convenience Retailing on Stations

- 10 years ago – Nil
- Today 50+ achieving very high sales
- £100m of SSP UK Rail's business – Nil 5 years ago

Convenience Growth Driven By

- Rising single households
- Busier life styles
- 'C' stores improving their quality



Less big weekly
Shops
&
More frequent
top up Shops

1982 Catering at Paddington (7 units)

**Tournament Buffet
Castle Buffet & Bar
Kiosk/Off Licence
Knights & Heralds pub
Railbar**

**WH Smiths
Journeys Friend**

2004 Catering at Paddington (21 units)

**Reef Café-Bar
Burger King
Delice de France
Caffe Ritazza
Upper Crust
Souperdouper
Taste!
Millies Cookies
Threshers off Licence
Marks and Spencer's
Great American Bagel Co
West Cornwall Pasty Company
Fullers Pub
Eat sandwiches
Singapore Sam's
Caffe Nero
Costa Coffee
Sainsburys Local
WH Smiths
Boots
Yo Sushi**

SSP UK Rail Brand Portfolio - Bakery



SSP UK Rail Brand Portfolio - Cafes



SSP UK Rail Brand Portfolio - Bars



SSP UK Rail

Brand Portfolio – Retail / Convenience

MARKS &
SPENCER

SIMPLY FOOD

Whistlestop

F O O D W I N E

amigo

shop to go

THRESHER

WINE
SHOP

SSP UK Rail Brand Portfolio – Fast Food



Harry Ramsden's[®]

soüper **douper**



UpperCrust



**Speciality
freshly baked
baguette brand**

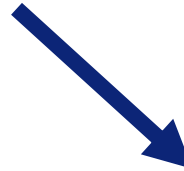
**Guaranteed 3
Hours
Freshness**

**Generates high
sales**

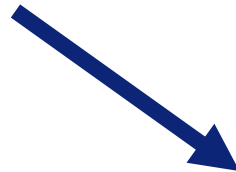
Victoria Jardin de Paris to Upper Crust



40% plus
Revenue
Growth



40% plus
Revenue
Growth





**Specialist
sandwich outlet**

**Also sells
salads, juices,
smoothies etc**

**Broad appeal,
competitively
priced**



Ixxxy's Bagels



Premium speciality bagel brand

Deli / made to order counter

Strong health perception

Millie's Cookies & Muffins



**American style
Muffins & Cookies**

**Freshly baked on
site**

Small Footprint

100+ units



**Great espressos,
lattes, cappuccinos,
mochas etc**

**Hot Paninis and
Ciabattas**

High sales potential



freshly toasted



enjoy a chicken and pesto
toasted panini
with a takeaway cappuccino
subject to availability



enjoy our freshly toasted chicken pesto panini

A promotional graphic for Caffè RITAZZA. At the top, the text "freshly toasted" is written in white on a dark red background. Below this is a close-up photograph of a toasted panini filled with chicken and pesto. To the right of the panini is a red and white takeaway cappuccino cup with the RITAZZA logo. The text "enjoy a chicken and pesto toasted panini with a takeaway cappuccino" is written in a mix of red and black fonts, with "subject to availability" in a smaller font below. At the bottom, a dark red banner contains the text "enjoy our freshly toasted chicken pesto panini" in white.

**In line Caffè
Ritazza Kiosk**

**Smaller Foot
Print**

A light blue rectangular box containing the text "In line Caffè Ritazza Kiosk" and "Smaller Foot Print" in a bold, dark blue, sans-serif font.

Caffè Ritazza Cart Formats



Great espressos,
lattes, cappuccinos
and food.

Small footprint
-Approx 3m x 2m

High sales potential



Caffè Ritazza Mobile Carts



Great espressos,
lattes, cappuccinos
etc

Small footprint
Approx 2m x 0.7m





Broad Offer

Food and coffee offer with bolt on

- Retail
- News
- Licensed

Ideal for platforms and lower footfall stations

Bonaparte's Café Bar



**Traditional
Café bar**

Coffee

Salads

Beer and wine

Reef Café Bar



Contemporary Café Bar

Pitched at premium 25 to 45 market

50:50 Male and Female

Optimises penetration across the day-parts

Traditional Bars



Draught beer led offer

Male dominated clientele

Older customers than Reef

Amigo Shop to Go



**Main offer –
confectionery, news
tobacco**

**Also offers coffee,
snacks, gifts**

**Large – Small
footprint**



**Broad appeal
convenience led retail
brand**

**Snacks, ready meals,
wine etc**

40 sites in the UK



MARKS & SPENCER SIMPLY FOOD



Famous UK food retailer

Offers a wide range of convenience foods

Achieves very high sales

Commuters lives made easier

-Shop on way home

In summary...

- 1. Fully understand the retail / catering needs of station users**
- 2. Fully understand country market trends**
- 3. Develop brand portfolio to meet customer needs & market trends**
- 4. Deliver the brands consistently well to customers – day in day out.**

....what could be simpler!

Thank-you

