

Turning Data Into Action:

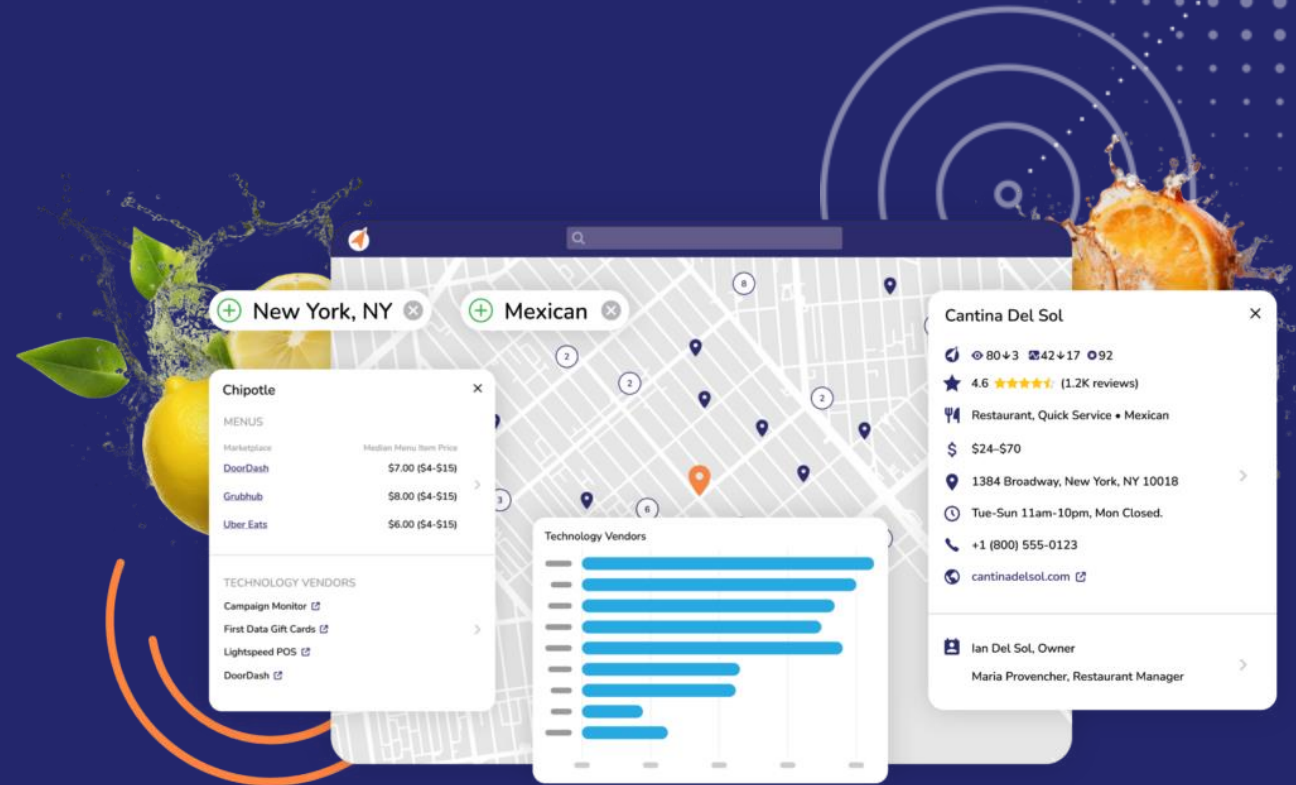
Exploring Opportunities in the
Australian Foodservice Market



Mike Provencher
Head of Customer Success
Brizo FoodMetrics



What is Brizo FoodMetrics?





At Brizo FoodMetrics, we:

1. Collect

the online footprint of the foodservice industry from highly-credible sources

2. Digest

cleanse, enrich & aggregate raw data into 2.1M+ foodservice establishment profiles



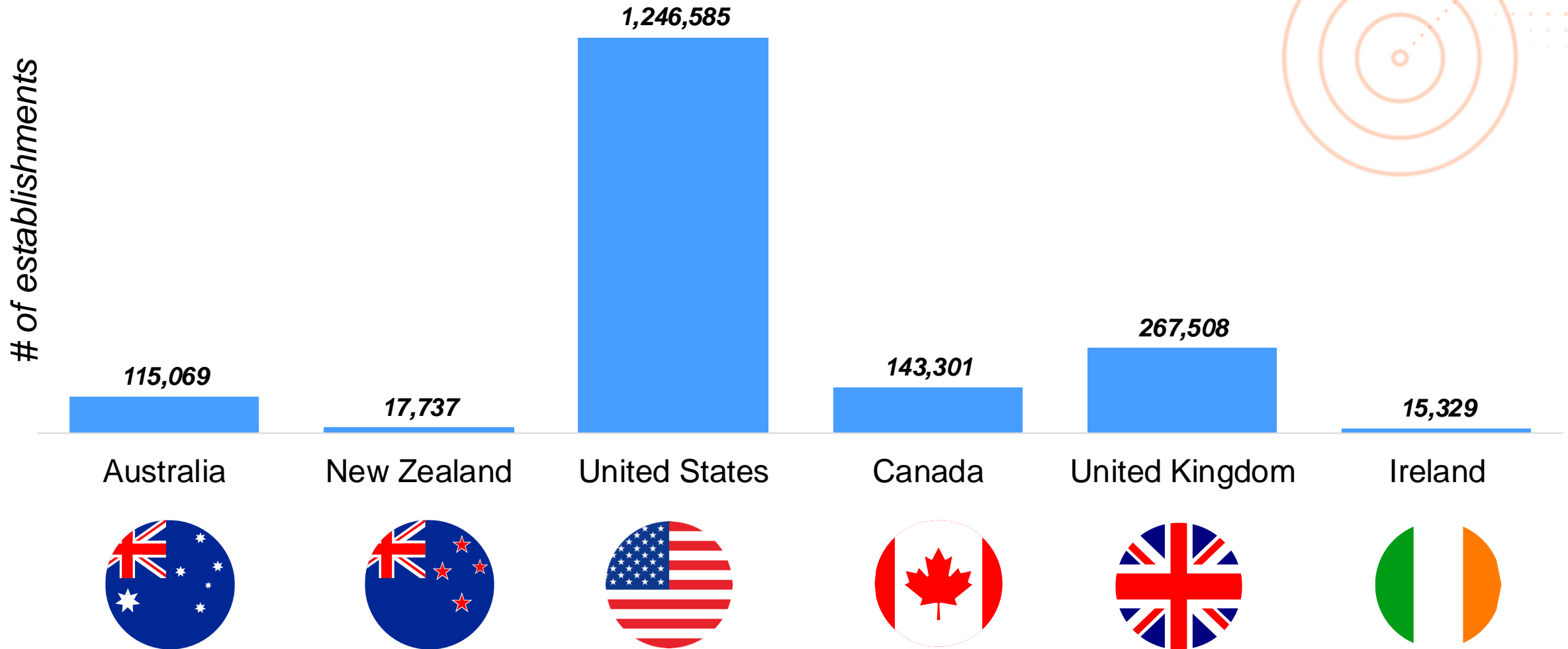
3. Optimize

translate our data into actionable insights via a user-friendly market intelligence platform

4. Track

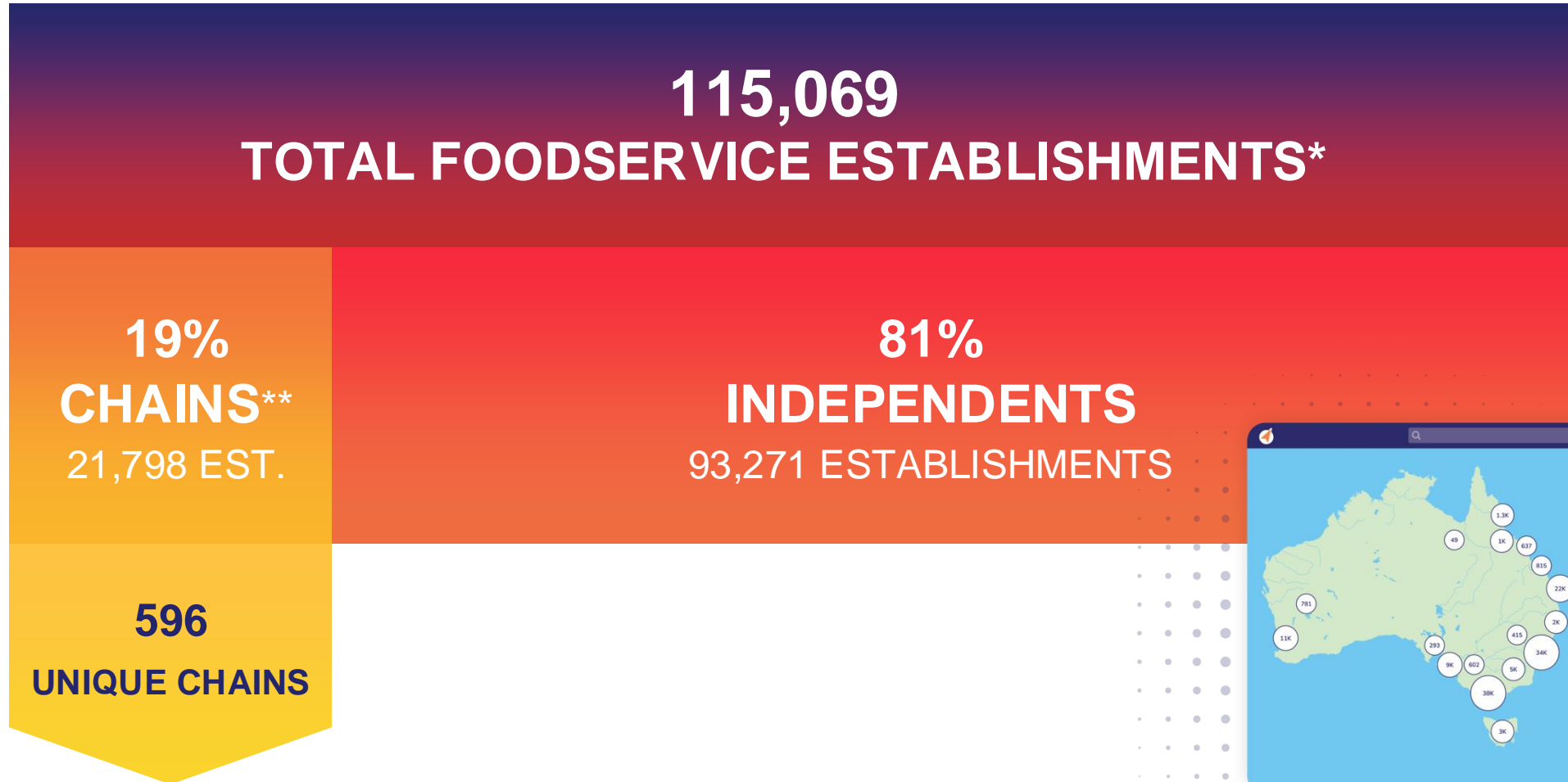
industry changes over time with historical data

Foodservice Establishments by Country



Number of foodservice establishments by country, across 15 business types (see Appendix). Source: Brizo FoodMetrics, August 2024

Australian Foodservice Market Overview



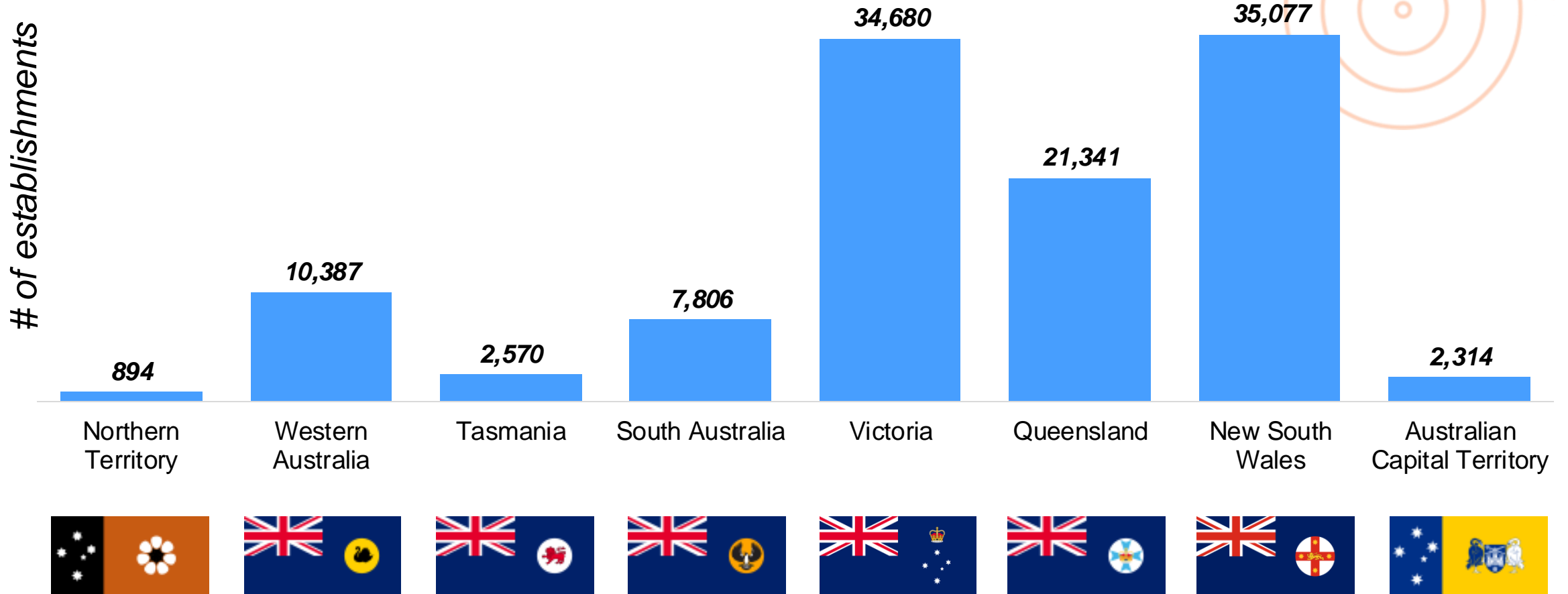
* Across 15 business types (see Appendix)

** Where chains are defined as 5 or more establishment locations

Source: Brizo FoodMetrics, August 2024













Australian Establishments by State or Territory



Top Chains in Australia

by number of establishments



	1543
	1234
	894
	740
	628
	593
	472
	412
	330
	310

Source: Brizo FoodMetrics, August 2024

Top Chains in the State of **Victoria**

by number of establishments



402



309


























241

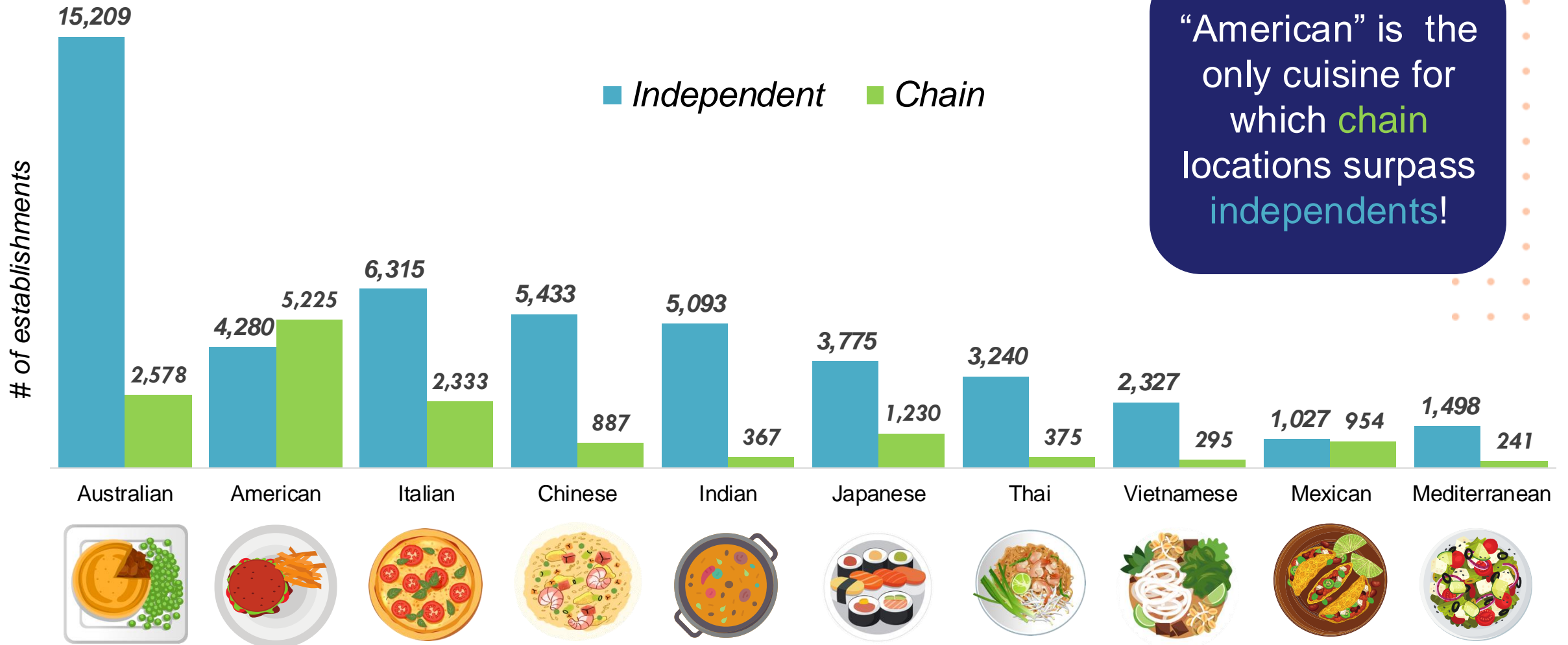
Top Chains by Australian State or Territory



by number of establishments

Australian Capital Territory	  	38 27 18	South Australia	  	111 108 87
New South Wales	  	522 326 309	Tasmania	  	35 27 25
Northern Territory	  	14 13 10	Victoria	  	402 309 241
Queensland	  	388 309 232	Western Australia	  	181 149 137

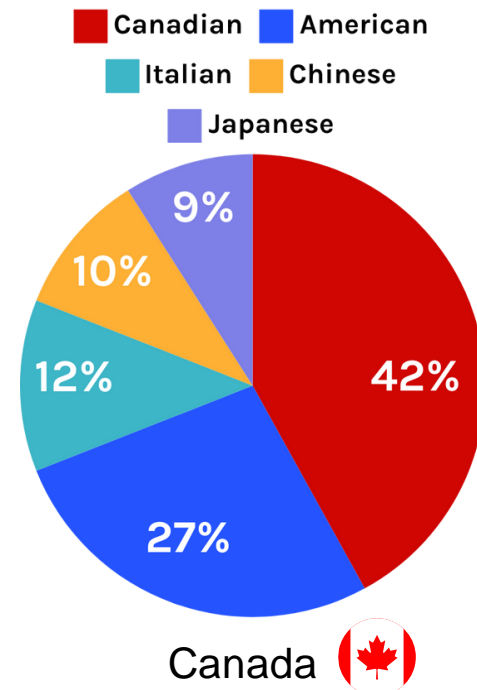
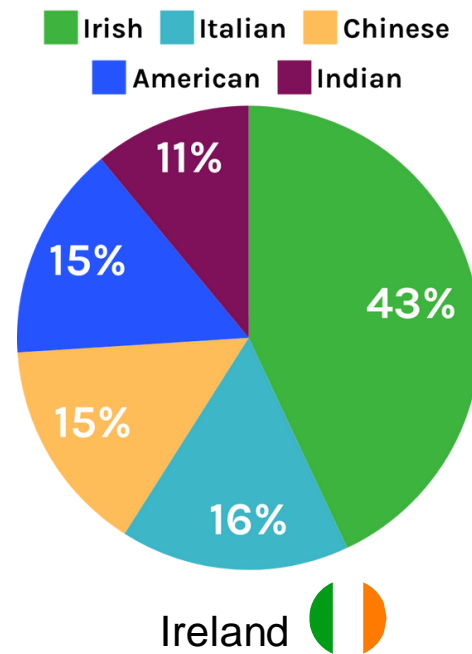
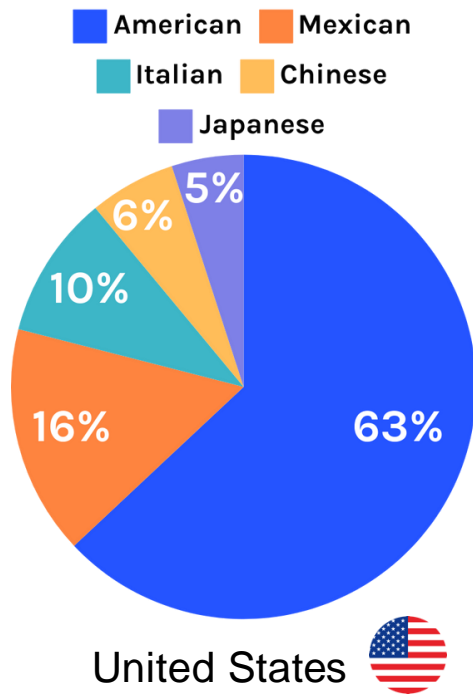
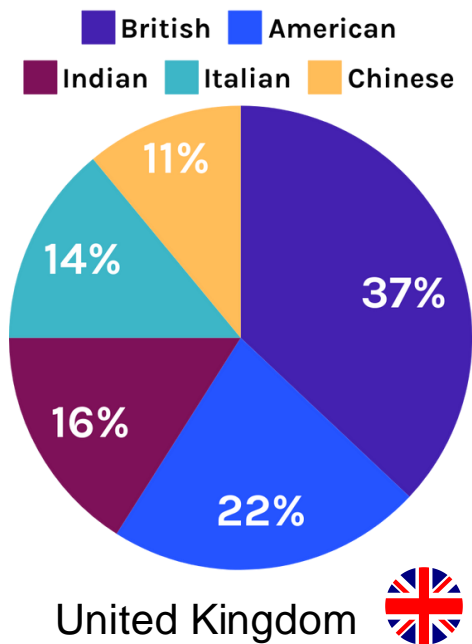
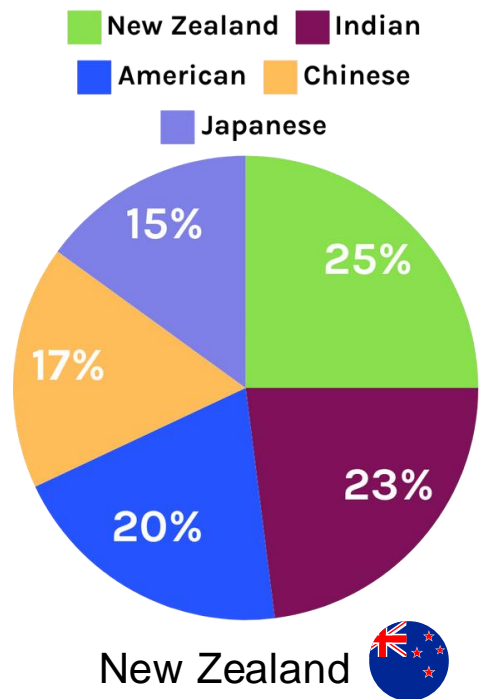
Top Cuisines in Australia



“American” is the only cuisine for which chain locations surpass independents!

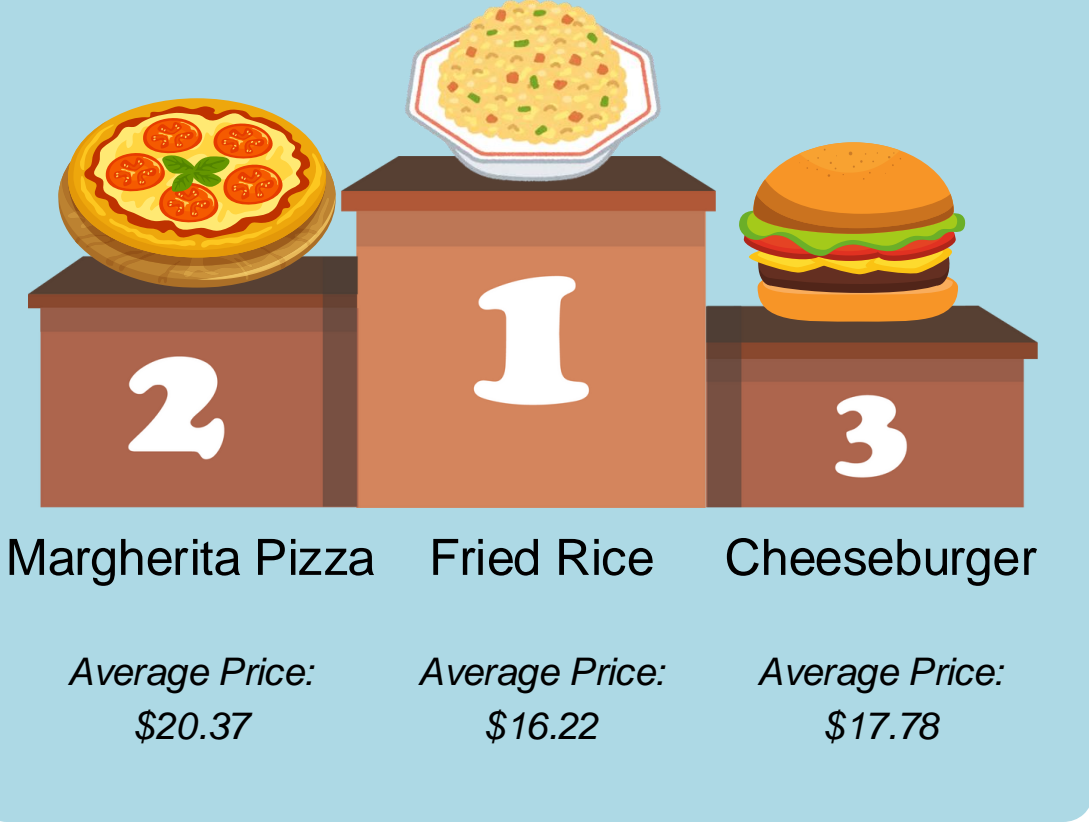


Top 5 Cuisines by Country

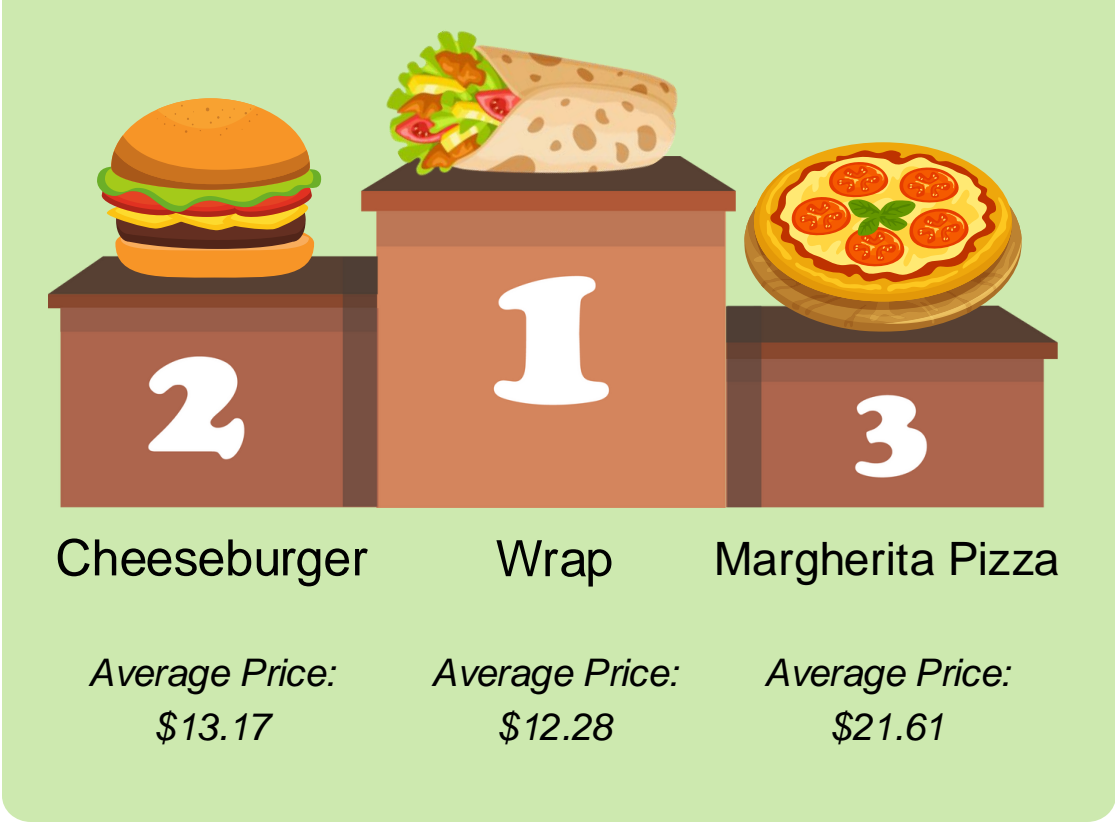


Top Dishes in Australia

Independents













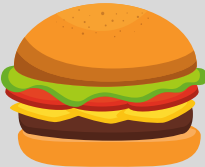









Chains



Source: Brizo FoodMetrics, August 2024

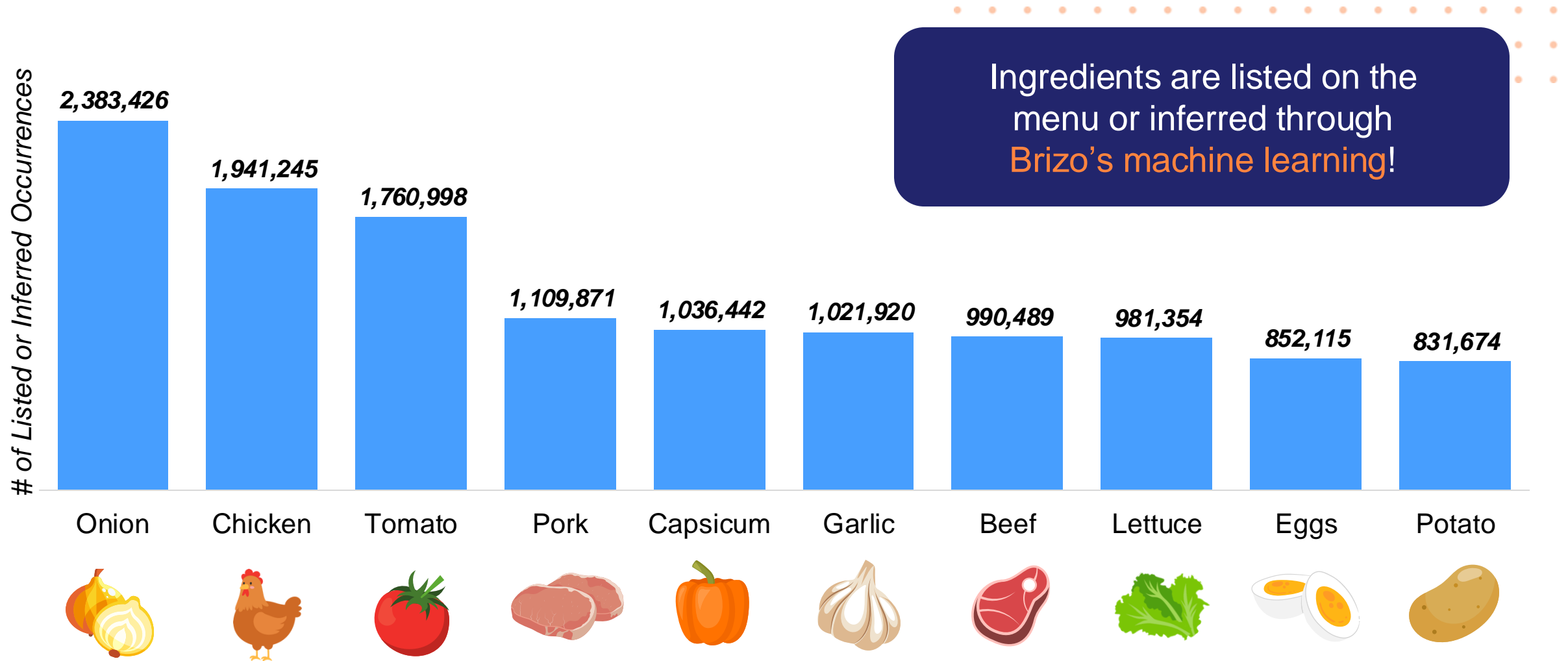
Top Dishes by Country



US 	Canada 	UK 	Ireland 	NZ 
 <p>Wrap</p>	 <p>Wrap</p>	 <p>Wrap</p>	 <p>Cheeseburger</p>	 <p>Fried Rice</p>
 <p>Cheeseburger</p>	 <p>Margherita Pizza</p>	 <p>Kebab</p>	 <p>Wrap</p>	 <p>Cheeseburger</p>
 <p>Chicken Sandwich</p>	 <p>Cheeseburger</p>	 <p>Cheeseburger</p>	 <p>Kebab</p>	 <p>Paneer</p>

Includes both chains and independents. Source: Brizo FoodMetrics, August 2024

Top Ingredients in Australia



Trending Flavours

Per the 2024 ANZ Kerry Taste Chart, these are some of the **hottest flavours in Australia** right now.

How can we analyze their prevalence in the market with Brizo FoodMetrics?



Teriyaki



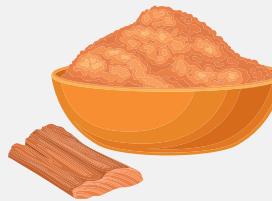
Chipotle



Jalapeno



Bulgogi



Hickory



Matcha



Kimchi



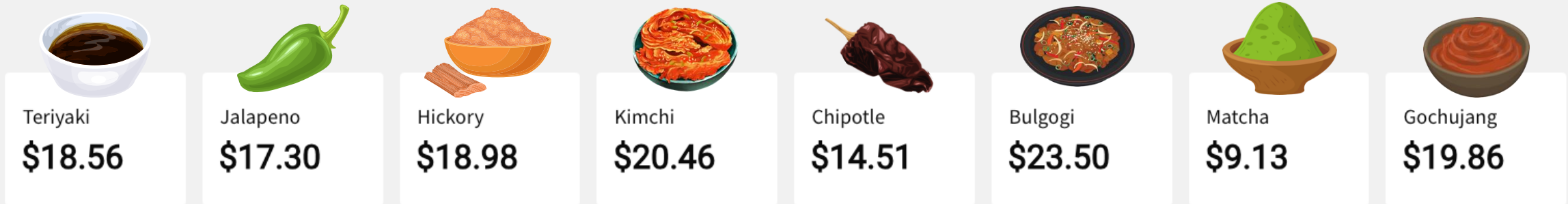
Gochujang

Source: 2024 ANZ Kerry Taste Chart

Trending Flavours: Advanced Analysis



Average Menu Item Price for Items with these Keywords

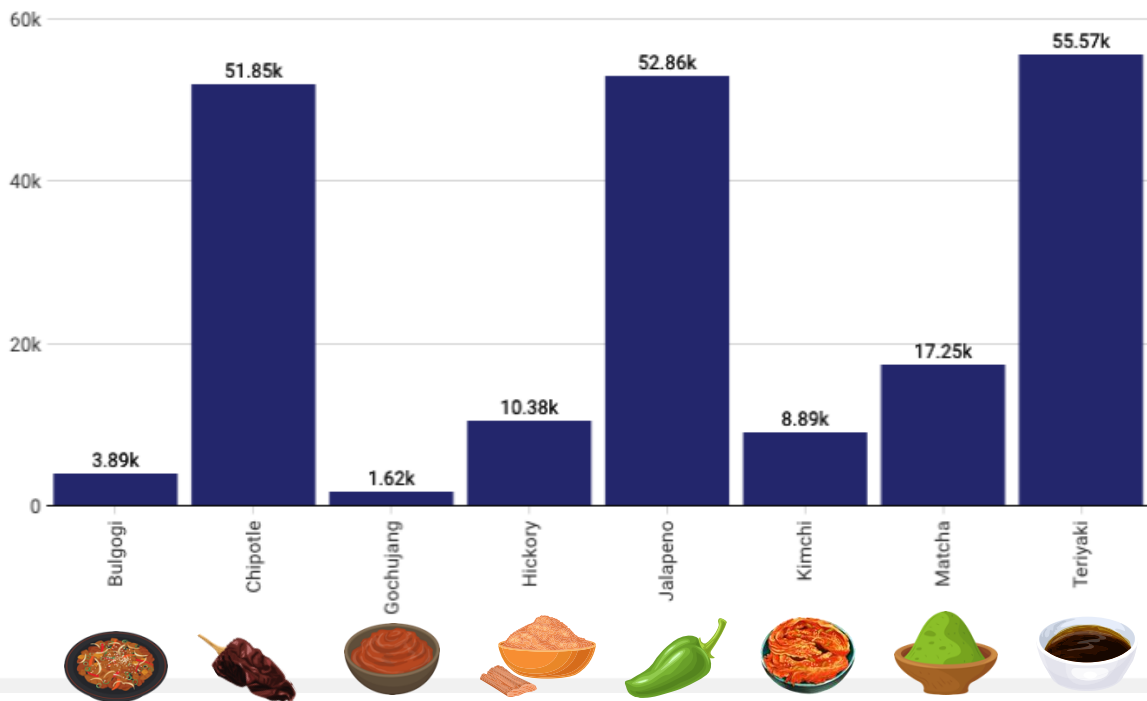


Example Menu Items with these Keywords

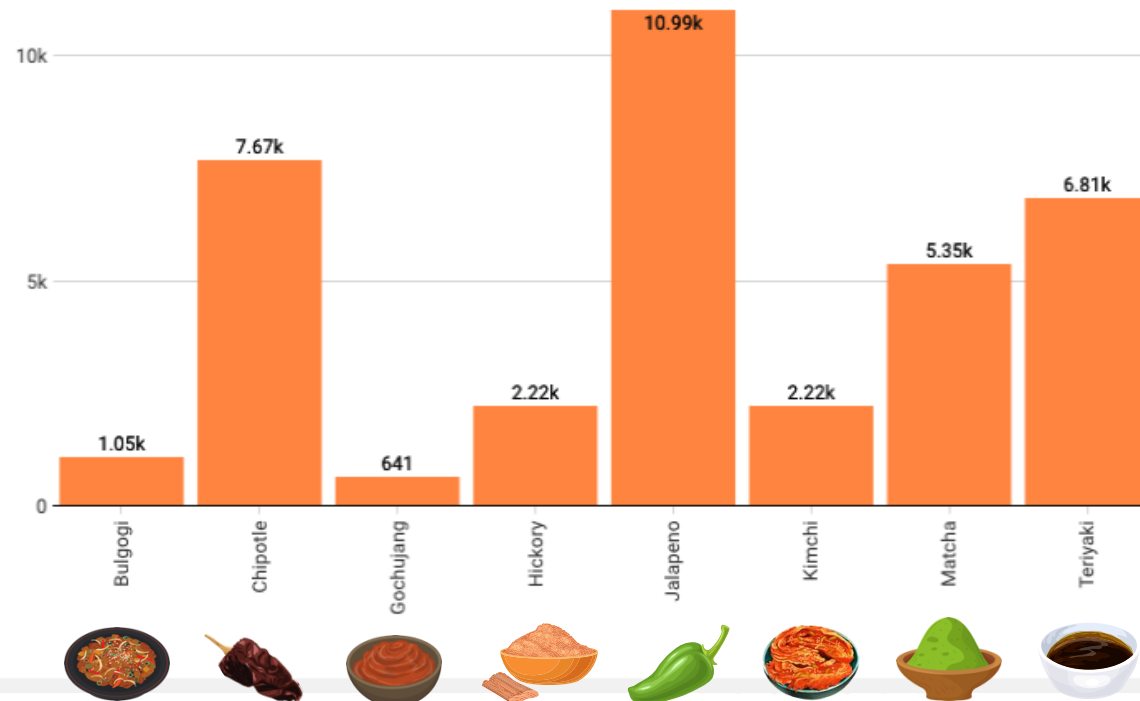
Teriyaki Chicken Curry	Smoked Stuffed Jalapenos	Hickory BBQ Chicken Wings	Kimchi Corn on the Cob	Chipotle Seasoned Fries	Bulgogi Burger with Chips	Iced Strawberry Matcha Latte	Gochujang Hot Wings
Teriyaki Salmon Rice Bowl	BBQ Chicken & Bacon Pizza	Hickory Steak Burger	Kimchi Fried Rice with Egg	Chipotle Chicken Burger	Cheese Bulgogi Panini	Matcha Latte with Panna Cotta	Tempura Chicken and Gochujang



Count of Distinct Menu Items by Word Inclusion



Count of Distinct Establishments by Word Inclusion



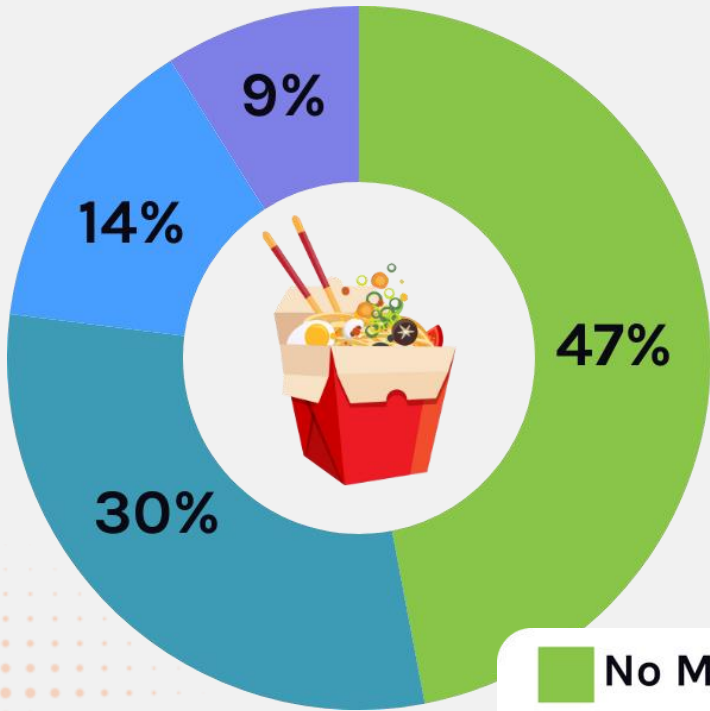
What's next? As we continue to expand our historical database, you'll be able to track the prevalence of these flavors over time (already available for our North American markets).



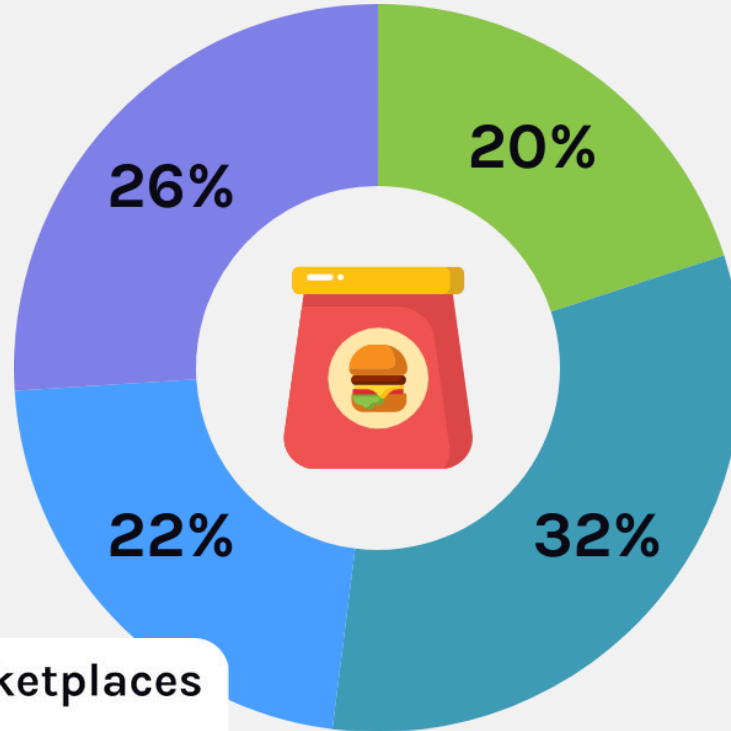
Restaurant Tech Adoption in Australia



Independents



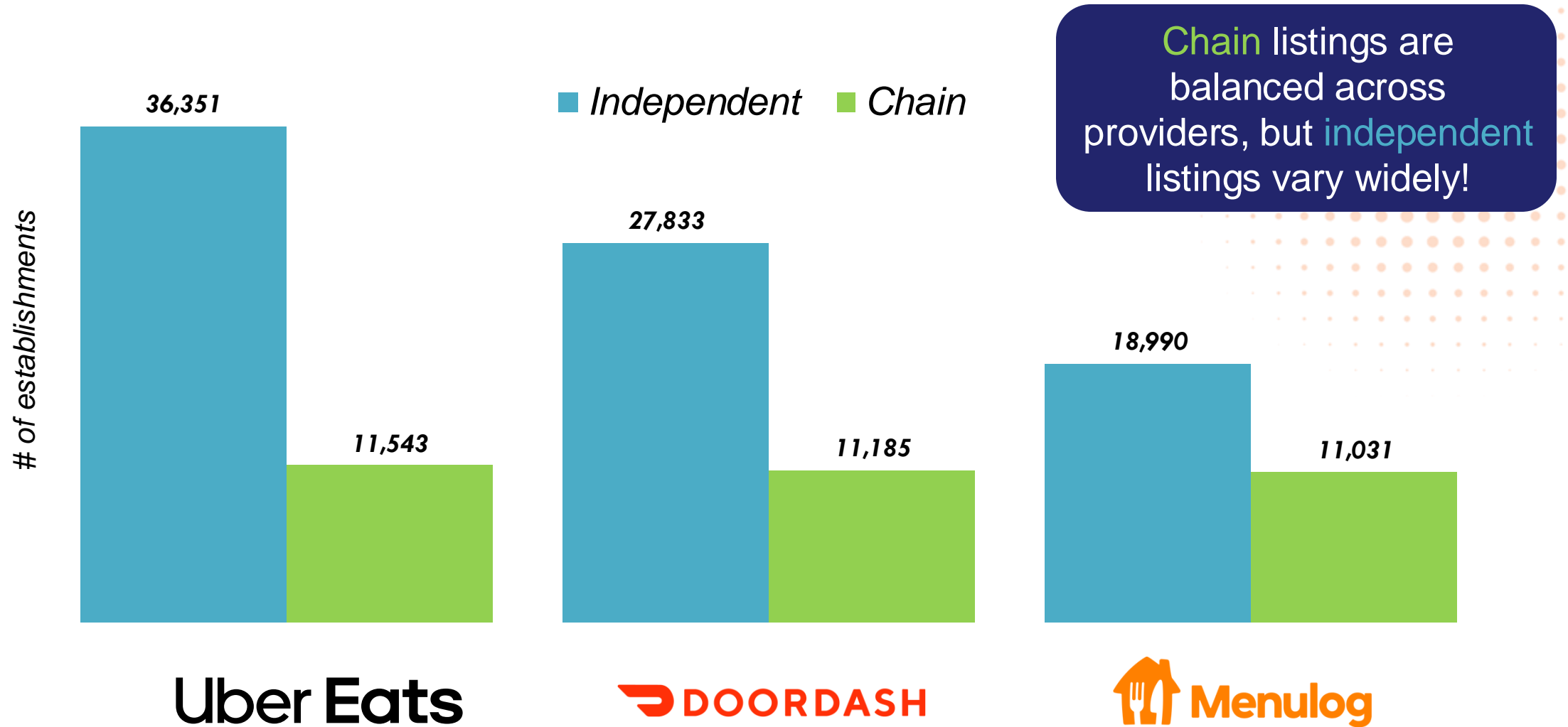
Chains



- No Marketplaces
- 1 Marketplace
- 2 Marketplaces
- 3+ Marketplaces

80%
of Australian chain locations list on at least one third-party marketplace (vs only **53%** of independents)

Top Delivery Marketplaces in Australia

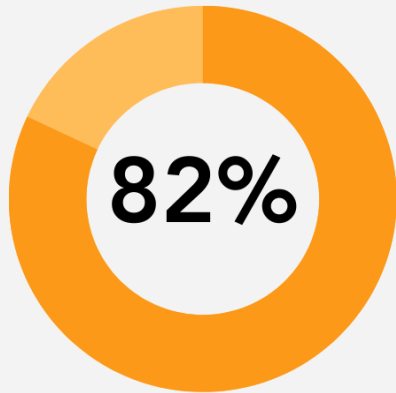


Takeaway & Delivery Adoption in Australia

Source: Brizo FoodMetrics, August 2024



Takeaway Adoption



Independents

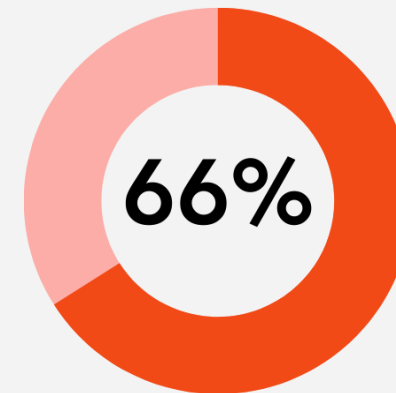
81%

Chains

87%



Delivery Adoption



Independents

61%

Chains

85%

Market
Research



Sales
Prospecting



Competitor
Analysis



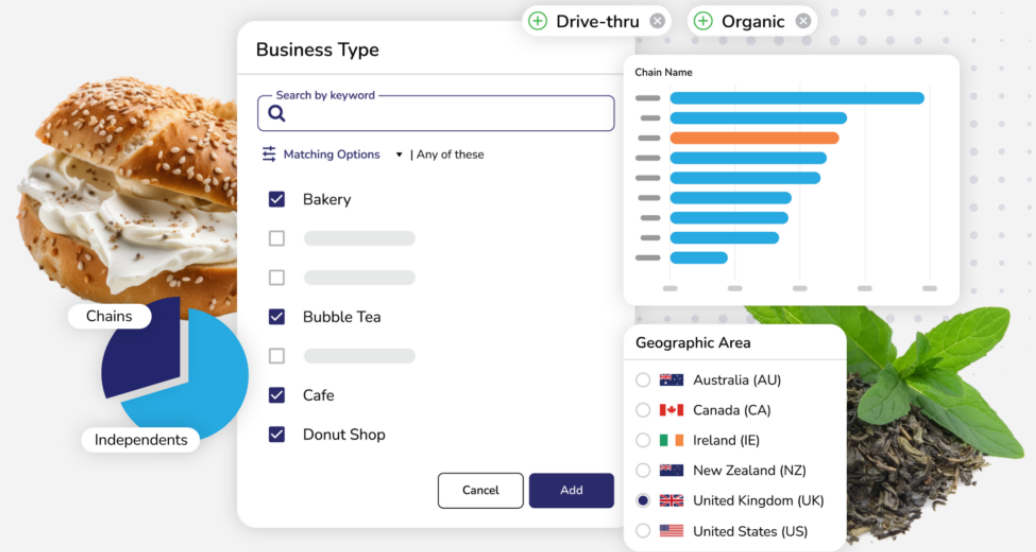
Marketing
Campaigns



Menu
Innovation



Data
Enrichment



How can market
intelligence benefit
your business?

Navigate the
FRAGMENTED,
FAST-PACED
foodservice industry
with **CONFIDENCE**



Improve
Market
Clarity



Enhance
Team
Productivity



Increase
Lead Quality
& Conversion



Thank you!

For more tasty insights,
go to brizodata.com



Appendix





Our Data

For the 115K Australian foodservice establishments analyzed in this presentation, the Brizo FoodMetrics filter criteria are as follows:

Country = Australia

Business Type = any of the following 15:

- Bakery
- Brewery
- Cafe
- Cafeteria
- Coffee/Tea/Boba Shop
- Delivery Only
- Donut Shop
- Drinking Place
- Eatertainment
- Food Court
- Ice Cream Shop
- Juice Bar
- Mobile Food
- Quick Service
- Restaurant