

INNOVATION:  
AUTOGRILL®  
INGREDIENT TO  
TRANSFORM TRAVEL  
FOOD & BEVERAGE  
EXPERIENCE



*Feeling good on the move®*



A close-up photograph of a hand holding a translucent globe. The globe is overlaid with a white network of lines, suggesting global connectivity. The background is softly blurred, showing the hand and part of the person's face.

Autogrill® Group is the world's leading provider of food & beverage services for guests on the move.

We operate mainly in airports, motorways and railway stations but also on high streets and in selected commercial sites and cultural venues. We serve a world on the move, travellers or urban moving in the city.



# WELCOME TO AUTOGRILL® GROUP

## Our vision as a Group

To be the undisputed traveller's choice and trustworthy travel food & beverage company in the world.

## Our mission is to take care of people on the move

Whether it's about eating, drinking or shopping, we want people on the move to reach their destination happier, safer and more satisfied thanks to our services. We make their time more effective and their journey more comfortable, adding value to their experience.



Dear Shareholders,

Last year saw significant results in terms of growth and the strengthening of our international reach through Autogrill®'s strong strategic focus over the last three years, which has enabled our Group to consolidate and to capitalise on new development opportunities. In 2016, the Group grew strongly in the airport channel by further strengthening its leadership in the United States, by entering new markets with promising growth prospects, such as China, and by expanding its operations in important countries like Germany, the UK and Scandinavia.

In the motorway channel we continued to adopt a policy of selective investments in certain key markets.

Strongly positive results were also obtained on the innovation front, where Autogrill® introduced new products and formats addressing customers' changing tastes and needs.

The strengthening of the Group's position is clearly reflected in its portfolio of concessions, which grew significantly in size and with an excellent average contract length. In line with the Group's strategic goals, we grew strongly in the airport and railway station channels, while stability was maintained in the motorway channel.

Such progress confirms Autogrill®'s global leadership, which we intend to continue consolidating in countries where we are well established and build in those countries that we are now entering with determination, at the same time as evaluating external growth opportunities that may arise, that meet our criteria.

**Gilberto Benetton**  
**Chairman**

Dear Stakeholders,

Autogrill® posted excellent financial results for 2015. While North America produced impressive figures that were key to the Group's overall performance, we should also remember the return to profitability in Europe and double-digit growth in the International area, where we won several new contracts and opened over a hundred new points of sale. Solid growth in sales and margins enabled the Group to double its profits and cash flow generation.

Over the year the Group continued to strengthen its medium-term competitive position both by increasing its contracts portfolio and by making significant investments, more than 50% of which are in North America. Almost 80% of total investments went into development.

We continue to take opportunities that will benefit us in the short and medium term by leveraging our know-how: our ability to partner with the world's biggest food & beverage brands at the same time as developing strong and innovative in-house brands, that are increasingly valued and competitive in Italy and abroad. Take Bistrot, for instance, which caters to travellers in channels and countries with different culinary traditions, from Dutch railway stations to North American and European airports and onto Italian motorways. And other award winning formats that we've created, such as Gorgeous Kitchen at Heathrow and Whisky River at Charlotte Airport, to mention just a couple. Geographical and channel diversification, the capacity to constantly innovate our offering and the passion and commitment of all our people are, in my opinion, the most effective means to successfully negotiate an environment that is still characterized by uncertainty and continue to grow in the future.

**Gianmario Tondato Da Ruos**  
**CEO**



# AUTOGRILL® AT A GLANCE

Hello

2.5 M  
said "Hello"  
everyday

30 countries\*  
about  
1,000 locations\*  
around  
4,200 stores\*  
Euro 4.3 BN  
in revenues in 2015\*

\*2015 Autogrill® figures



230 M  
coffees served\*



83 M  
sandwiches sold\*\*



67 M  
main courses served\*\*



900 M  
customers

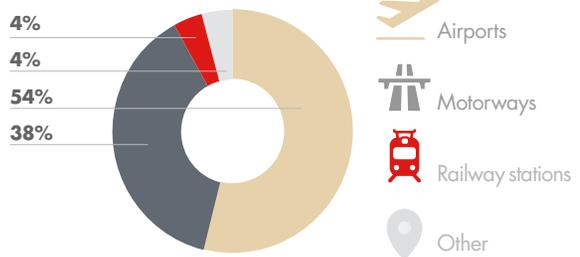


57,000  
employees

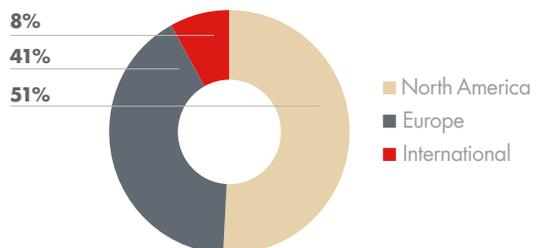


1997  
Autogrill® listed on the Milan  
stock exchange

## 2015 food & beverage sales breakdown by business channel



## 2015 food & beverage sales breakdown by business division



\*excluding Starbucks

\*\* including proprietary and franchise brands



+100,000 fans on Facebook  
 +9,000 followers on Twitter  
 +100,000 views on YouTube  
 around 30,000 followers on LinkedIn  
 around 2,000 followers on Instagram  
 more than 26 spoken languages

### Franchise brands

**Proprietary brands**  
 Feeling good on the move  
 +300 BRANDS

The collage includes logos for: Blaze Pizza, Le Place, Smash Burger, Wolegong Truck, Starbucks, Tim Hortons, Crystal Jade, Brioche Dorée, Dunkin' Donuts, Longhorn Steakhouse, Torta Fratello, Pizzeria Hut, Eataly, Burger King, McDonald's, Motta, Grab & Fly, Beau Devlin, Umaizumi, Two Tigers, Asia Street Cooking, La Tapenade, PZA, Bubbles, Puro Gusto, A Cafe, Spizzico, Territori D'Italia, Storie & Caffè, Ice, and Mo.

90%

Business carried out through concessions

### Concessions: a winning model

Autogrill® provides food and beverages services in airports, motorways and railway stations thanks to concession agreements with the owners of the infrastructures. A concession is the right to sell products or to provide services in exchange for a rent or a capital commitment at a specific location for a pre-determined amount of time. Main selection guidelines for the granting of a concession are brand offering, concept design and layout, brand reputation and experience. Over the last few decades, Autogrill® has built up extensive international and multi-channel experience in concession markets. This has enabled the Group to develop best-practice standards and significant expertise in analyzing passenger flows and identifying, for each location, winning commercial offers that generate value for both landlords and consumers.

# OUR STORY SO FAR 1947 - TODAY

## 1947

The first Autogrill® opens on the Milan-Turin motorway. The creator of this new consumer space for motorists was Mario Pavesi. In the '60s and '70s the catering market on Italian motorways expands and is predominantly managed by three different companies: Pavesi, Motta and Alemagna (those last two are specialized in the confectionery industry).

## 1977

Autogrill® SpA is born from the merger of the motorway catering operations of Motta, Pavesi and Alemagna. The company passes under the public control of IRI (Istituto per la Ricostruzione Industriale), the Italian state holding company.

## 1997

Autogrill® is listed on the Milan Stock Exchange. The company grows through acquisitions in France, Austria, Belgium, the Netherlands and Germany.

### ORIGINS

### PRIVATISATION & INTERNATIONAL DEVELOPMENT

## 1954

Founded in 1897, HMSHost starts its food & beverage and retail business on big railway networks. By the '20s it takes in shipping as well. In 1954 it is the first company to invest in America's large airports and wins its first airport concession contract at San Francisco International.

## 1995

Autogrill® goes private. Edizione Holding, controlled by the Benetton family, becomes the majority shareholder.

## 1999

Autogrill® acquires HMSHost in the United States.



FIRST AUTOGRILL® PAVESI ON ITALIAN MOTORWAYS, A4 MOTORWAY, NOVARA (ITALY)



AUTOGRILL® BRIDGE CANTAGALLO, A1 MOTORWAY, BOLOGNA (ITALY)



ARNWIESEN SERVICE AREA, A2 MOTORWAY, GLEISDORF (AUSTRIA)



HMSHOST'S HEADQUARTERS, BETHESDA (USA)



BUBBLES SEAFOOD & WINE BAR, AMSTERDAM SCHIPHOL AIRPORT (THE NETHERLANDS)

2005

Autogrill® enters the travel retail & duty free sector by acquiring control of Aldeasa, a leading operator in Spain with a significant presence in Latin America and the Middle East.

2008

Acquisition of World Duty Free (WDF), the leading operator in the UK, and completion of the acquisition of 100% of Aldeasa. To its leadership in the food & beverage sector, Autogrill® adds a leadership role in the field of travel retail & duty free.

2013

Autogrill® demerges its travel retail & duty free business.

BUSINESS DIVERSIFICATION

BUSINESS EVOLUTION

2007

Acquisition of Alpha Group, a leading in-flight catering and retail business based in the United Kingdom. The in-flight catering division of Alpha Flight Group Ltd was subsequently sold in 2010.

2012

Integration of the airport retail activities of Alpha Airport Group, WDF and Aldeasa. World Duty Free Group, Autogrill®'s travel retail & duty free division, is born.

2015

Entry in China with first opening of Puro Gusto in Asia. Expansion in Scandinavia with entry in Norway (already present in Sweden, Finland and Denmark).



AUTOGRILL® VILLORESI EST, A8 MOTORWAY, MILANO (ITALY)



BISTROT, MILANO CENTRALE (ITALY)



PURO GUSTO, BEIJING (CHINA)



BISTROT FIORENZUOLA D'ARDA (ITALY)



UTRECHT CENTRAL STATION (THE NETHERLANDS)



MERCATO DEL DUOMO, MILANO CITY CENTER (ITALY)

# A GLOBAL RESTAURANT

Autogrill® operates across four continents. Our activities are managed through three business divisions: Europe, North America (United States and Canada) and International (Northern Europe, Middle East, Asia, Australia and New Zealand).

In each of our markets, our guests know us through familiar international and local brands.



“Europe is where Autogrill® is born. Its **historical roots** represent 41% of the total Group business. The Group inherited from Italy its passion for food, its inspiration for culinary culture and its high expectation for premium quality. Autogrill® Europe focused on a customer centric approach, improvement of our sales effectiveness, innovation booster and work on structural improvements. Autogrill® is the unbeatable leader on **motorways**. Fiorenzuola d’Arda is our latest exceptional site example. In 1959 the Group built the first iconic bridge on motorways in Italy, today it is completely modernized, where we offer the first Bistrot concept on motorways. Bistrot concept is unique and differentiating thanks to its global value proposition with a locally inspired offer, a partnership with University of Gastronomic Sciences of Pollenzo and recovery of craft techniques.”

**Alessandro Preda,**  
**CEO Autogrill® Europe**



“We entered the airport business in 1954 with our first location in San Francisco International Airport, and now we operate in more than 80 airports in North America, with award-winning restaurants such as 1897 Market at Charlotte Douglas International Airport. We’ve **set industry trends in motion**, being the first to bring national chains into the airports in the ‘80s; to bringing local street side restaurants that create a sense of place for travellers; to even creating our own proprietary dining experiences. The complex **airport environment** and the uniqueness of each one challenge us every day to continuously evolve through innovation, best-in-class guest service, and unparalleled culinary expertise; all to ensure the traveller is feeling good on the move.”

**Steve Johnson,**  
**CEO HMSHost North America**



“Think global, cook local”, that’s our belief to create innovative foodservice experiences for international travellers. Thanks to our global reach, we are able to bring operational excellence and expertise, new concepts and attractive food & beverage offers to different parts of the world. We focus on different **geographic opportunities**: India, Middle East, China, South East Asia and Northern Europe.

Entering a new channel, like **railway stations**, was a major step in 2015. We opened three brand-new food & beverage concepts at Utrecht Centraal Station in the Netherlands, in the lively heart of the station and city. By creating meaningful experiences, speed and affordability, we underwrite our signature: “Feeling good on the move.”

**Walter Seib,**  
**CEO HMSHost International**

**EMEA**  
43 airports  
600 motorways  
52 railway stations  
67 towns, malls &  
other venues



**AMERICAS**  
85 airports  
100 motorways  
3 shopping malls



**ASIA & OCEANIA**  
20 airports



# AIRPORTS

148 airports

27 countries

54% of Group food & beverage Sales



AIRPORTS ARE THE  
HUB OF GLOBAL  
GROWTH. AUTOGRILL®  
ACCOMPANIES TRAVELLERS  
IN THE BUSIEST AIRPORTS.

## **Autogrill® serves a world on the move**

Autogrill® provides food & beverage services in approximately 150 airports worldwide, including the biggest passenger airports: from Atlanta to Beijing, Amsterdam to Dubai, Charlotte to Helsinki, Los Angeles to Hanoi. In the US, Autogrill® is the number one travel caterer: through HMSHost it manages food & beverage services in the top 30 US airports. The global trend is for more and more people to travel by plane: between 2012 and 2031 worldwide passenger numbers will rapidly increase to 12 billion travellers, a compound annual growth rate of 4.1% (source: ACI forecasts).

## Managing big hub, case study: Schiphol



In 1995 we started the partnership with Schiphol Group. This has led to a high-level partnership covering 71 points of sales at Amsterdam Airport Schiphol. "What

really sets Autogrill® Group apart is its leadership in hospitality and innovation, making it a prime example in the business." said our Airport Schiphol business partner. The partnership is extended to 2027, because Schiphol Group has trust and confidence in our Group as their business partner. The strong basis of this partnership is evident from the seven iconic new food & beverage concepts that are developed for the completely removed Lounge 2 at this airport.

## Entry to China, expansion in Asia



Since 2015, the Group announced nine points of sales at Beijing International Airport and four concepts at Sanya Airport. We operate at Beijing International

Airport in partnership with Huazhou, a locally experienced hospitality company. Entry to China is an important step for our expansion ambitions in Asia. These new openings are the continuation of a program which is in line with the strategy of expanding into the growing and emerging economies of the Asia Pacific region, and will enable the Group to continue its ambition to obtain a global presence.

## Pier Zero, Finland



Pier Zero is our newest concept in Finland and with its iconic design: a real flagship store. This restaurant and bar reflects the famous four seasons of Finland. The rough

nature is reflected in the menu, specially developed by our Finnish chefs.

The opening of Pier Zero is part of a long-term agreement that was signed in October 2013 with Finavia Corporation, the operator of Helsinki Airport and 23 other airports in Finland. Besides Pier Zero we operate 12 other concepts at Helsinki Airport, which is the gateway to China.

## 1897 Market, US

This exclusive brand is a distinctive urban gourmet



marketplace, an emporium for the senses where travellers can experience an epicurean immersion before jet-setting. Named for the year HMSHost was

founded, then as the Van Noy Railway News business, the inspiration for 1897 Market comes from a lasting legacy and was developed through a partnership with celebrity chef and television personality Todd English. Cues from English's knowledge of culinary traditions and emerging food trends from around the world are infused into 1897 Market.

## Airport Restaurant Month & Channel Your Inner Chef initiatives



Capitalizing on the popular Restaurant Week, we launched in October 2014 the first-of-its-kind Airport Restaurant Month. For a full month, travellers

have the opportunity to take part in an innovative culinary experience in the middle of selected airports. This includes a set menu created by our team of expert chefs that welcomes diners to sample a selection of appetizers. Due to popular demand, it is now held in May and October every year across more than 60 North America airports and expanded to Europe in 2016. In partnership with the Chicago Department of Aviation, the Group held Channel Your Inner Chef in 2015 and 2016, an innovative recipe contest that spotlights local flavor and celebrates HMSHost's sponsorship of the 2016 James Beard Awards. A panel of experts select five finalists to compete in a cook-off in front of a live audience and panel of judges.

# MOTORWAYS

700 service stations

14 countries

38% of Group food & beverage Sales

IT ALL STARTED ON ITALY'S  
MOTORWAYS DURING  
THE 'DOLCE VITA' ERA.  
AUTOGRILL®'S HISTORIC  
CORE BUSINESS  
HAS CHANGED  
SIGNIFICANTLY OVER  
THE YEARS.

## **Autogrill® has leveraged its Italian experience to develop outstanding expertise and quality of service**

The Group manages 700 service areas along the main motorways across 12 European countries and two in North America. In North America, through HMSHost, the Group runs catering outlets at some 80 highway locations in the US and 20 in Canada. Autogrill® is focusing investments in specific and profitable areas of the motorway business.

### Delaware Welcome Center, USA



The innovative Delaware Welcome Center is the sole service station on the Delaware Turnpike section of Interstate 95, the busiest motorway in North America. Opened

in 2010, the 4,000m<sup>2</sup> catering area was Silver LEED-certified by the US Green Building Council. Among the many innovations, the area has a geothermal energy plant, recharge stations for electric cars and incorporates recycled materials.

### Taponas, France



Reopened in 2015, the area of Taponas is emblematic of the new service centers in France: an offer of various motorways concepts and services in

a contemporary building shared with the oil company. This building has a strong design architecture, echoing the Beaujolais landscapes. It hosted in 2015 more than 760,000 guests in its three restaurants, Burger King, Ciao and Pains à la ligne.

### Villoresi Est, Italy



Re-invented in January 2013, Villoresi Est is a next-generation sustainable motorway service station, offering an innovative experience for the full range of

visitors. Amenities include wifi and meeting rooms for business travellers, dedicated parking and services for truck drivers and family areas including a play area for children. The food & beverage facilities meet the wide variety of customer needs, with four expertly designed

food outlets – Spizzico, Ciao, Territori d’Italia and Motta – and a large retail area providing customers with an experience reminiscent of duty free shopping at the airport. The project site was awarded the prestigious gold certificate issued by LEED (the leading world authority on green building). All the construction materials are eco-friendly and recyclable.

### Autogrill® Pratteln, Switzerland



Opened in 1978, Autogrill®’s Pratteln motorway service station and shopping bridge is known as “the gateway to Switzerland” for its bright yellow exterior,

designed by the famous Cuban artist José Pardo. Every day around 125,000 motor vehicles pass under the bridge, which houses a large food and retail area including eight sales outlets.

There is a mixed shop as well as a petrol station shop on each side. Furthermore, a large free flow restaurant, a bakery with a woodstove and a Burger King comprises the great food & beverage offers.

### Woodstock Service Center, Canada



Woodstock Service Centre in Ontario Canada delivers a large choice of concept brands: Tim Hortons, Starbucks, Burger King, New York Fries, East Side Mario’s and M Market.

This travel plaza is part of ONroute Services Centers regrouping 23 motorway locations across more than 800km. Each center is designed to ensure a positive and uplifting experience for the public. Targeting LEED Silver or Gold for environmental sustainability, the material selection focused on maximizing regional and recycled content, ensuring durability and cleanability.

# RAILWAYS STATIONS & CITY CENTERS

52 railway stations

8 countries

8% of Group food & beverage Sales

HIGH-SPEED TRAINS  
ARE TRANSFORMING  
THE WAY PEOPLE TRAVEL.  
CITY-CENTERS ARE THE  
NEW DESTINATIONS.  
AUTOGRILL® ALSO  
RENEWS ITSELF.

**Since 2008, Autogrill® has further developed its railway concession business, increasing its presence in European stations as superfast trains start to connect the continent.**

We now operate over 250 outlets in 52 railway stations across Italy, Switzerland, Spain, Belgium, Czech Republic, the Netherlands and United Kingdom. We are also the main provider of food & beverage services in both the UK and French rail terminals of the Eurotunnel.

### Atocha, Spain



Autogrill® operates in Spain Madrid's largest railway station, Puerta de Atocha, serving 5,000 customers a day. All 13 outlets the Group manages at Atocha have

been refurbished over the last eight years, following more than 5M of investment, and new brands such as Foodissimo, Puro Gusto, Burger King and Wine Plaza have been introduced to the station.

Turnover has increased to over 15M in 2015 from 4M in 2002. To mark the inauguration of the Madrid-Valencia high-speed line in 2010, Autogrill® opened two new outlets, Pic-Nic and Il Caffè di Roma in the new arrivals hall.

### Bistrot Milano Centrale, Italy



Bistrot Milano Centrale is a new outlet in Milan's busy railway hub and the perfect marriage of sustainability and gastronomy. Conceived in cooperation with the Italian

University of Gastronomic Sciences of Pollenzo, it serves seasonal, zero miles and locally-sourced products. The restaurant is laid out like a local market with stalls such as "Il Forno", selling sourdough bread products, "La Caffetteria", providing authentic Neapolitan coffee, "Il Frutteto", with fresh smoothies and fruit salads, and the "Cucine di Strada", serving local speciality street food.

### Utrecht Centraal Station, the Netherlands



In 2015 we entered Dutch railway stations by opening at Utrecht Centraal Station three brand-new concepts: Bistrot Centrale (second Bistrot format on railways),

't Koffiehuis (coffee house, in collaboration with the famous Dutch coffee company Douwe Egberts), Bar Centraal (in collaboration with Heineken and especially designed beer bottles with the Utrecht DOM Towe). With space for 400 to 500 seats and a pleasant atmosphere, the first floor of the Utrecht Centraal station is the perfect meeting place for business professionals, travellers and students, in the heart of the station and the city. We also operate 4 La Place and 17 Burger Kings into the complete Railway collaborations.

### Il Mercato del Duomo, Italy



Il Mercato del Duomo is the flagship store that the Group opened in 2015 in the heart of Milan. It was developed in partnership with the University of Gastronomical Sciences

in Pollenzo and the training school of the three Michelin star chef, Niko Romito to meet the needs of the over 30,000 people that cross the city centre everyday. Motta Caffè Bar, Il Mercato, Bistrot Milano Duomo, Terrazza Aperol, Berlucchi Franciacorta Lounge and Spazio Milano - a Niko Romito Formazione project - are the concepts chosen to celebrate the excellence of Italian food and its local gastronomic traditions.

# INNOVATION

## Working with chefs

Food is Autogrill®'s passion so we aim to excellence collaborating with top-class Chefs on daily basis at different levels: deep commitment with the Culinary Council to transform and improve our food & beverage offer, in-store special culinary events to deliver our guests a living experience (see page 13) and creation of exclusive and unique signature concept restaurants to enhance guests experience and surprise.

### Meet our celebrity chefs

We are working with celebrity chefs all around the world. From "signature dishes" to "signature restaurants" and even include in our location some chefs training own location like Niko Romito Formazione in Duomo Milano.



Lorena Garcia, Miami and Atlanta Airports



Four females chefs in The Goregous kitchen, Heathrow



Benjamin Luzuy in Le Chef, Geneva



Nikko Romito's team in Spazio, Milan



Susur Lee in LEE kitchen, Toronto Airport



Lynn Crawford in The Hearth, Toronto Airport



## Food Partnerships for our Culinary Council

### Culinary Council

The mission of our New Product Development teams is to ensure we build the "Best in Class" Foodservice travel industry, also through high quality collaborations and networks. This is why we have created the **Culinary Council** inside our Group, which is an international yearly program of gastronomic innovation bringing chefs and opinion leaders from the foodservice industry together to discuss ideas for transforming the foodservice offering for our industry. The ambition is to develop the real and perceived quality of Autogrill®'s foods, focusing straight away on ingredients, as well as on preparations, packaging and development of new ranges.

Part of this Culinary Council are various partners including celebrity chefs from Europe and North America, expert nutritionists, **Magenta Bureau**, **UNISG** (University of Gastronomic Sciences), **EATALY**, **Gambero Rosso**, opinion leaders from the hospitality industry and also our own experts like the Autogrill Bread Academy or the "Autogrill Ateliers Expertise" called **Spazio Fucina**. 2015 marked the launch of exciting new initiatives and partnerships including the first ever HMSHost sponsorship of the prestigious **JAMES BEARD FOUNDATION AWARDS** in Chicago.

The great breakthrough for our Culinary Council is to share the experiences of the greatest chefs, who have led to that fusion of styles that we can witness at **Identità Golose**, first international culinary congress created in 2005 in Italy entirely dedicated to signature cuisine and pastry making. During this three day-convention at Mi.CO in Milan, the most recognized chefs come from around the world to meet and discuss best practices and new culinary trends. They present their innovative ideas through astonishing demonstration cooking. In 2016 Autogrill® has been for the first time one of the official partners of Identità Golose 12th edition with Bistrot concept brand stand.



PROUD SPONSOR OF THE 2016 JAMES BEARD AWARDS



MAGENTA bureau

## AUTOGRILL® IS ALWAYS LOOKING FOR INNOVATIVE SOLUTIONS IN 5 DIFFERENT AREAS



**1. Food & beverage** innovation led by our culinary experts team to create genuine meals. More and more **we transform our offer**, looking for local solutions for supply and quality product sourcing. As coffee-making experts we host Barista contests and have a global partnership with Kimbo. We care about vegetarians and healthy food attentive people, and offer them a dedicated food selection.



**2. Digital or non digital services** innovation because we know our consumers well, we know their experience can differ thanks to services. We pay attention to our consumers to answer their increasingly demanding needs with **the right solution**.



**3. Brand and concept** innovation to create a **unique customer experience** by selecting and developing the right brand and concept for each individual location in all regions and channels globally, totally devoted to customer satisfaction through high food and service quality.



**4. Location** innovation to create a place like no where else. **Zurick Foodland** is an airport foodcourt with seven concepts offering a great variety of delicacy from all over the world. In **Lambert-St. Louis International Airport**, we deliver catering services to a previously unused part of the airport that has now been transformed into an event space: 26,000 square feet in Concourse B featuring sweeping views of Lambert's airfield. We created a new meeting point on the first floor of **Utrecht Centraal Station**, using the slogan #meetmeupstairs with a range of three concepts (Bistrot Centraal, Bar Centraal and 't Koffiehuis).

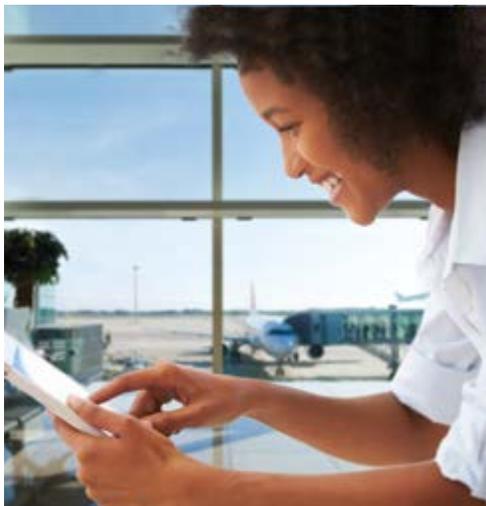


**5. Design** innovation **with state-of-the-art contemporary environments** within the many airport landscapes, like Mercedes-Benz Café in Rome, Le Chef in Geneva, Beaudévin in Brussels and Bubbles in Munich.



### Autogrill® digital priority

Digital transformation is a Group strategic priority. Digitalization is totally embedded inside the company organization, working continuously on different activities, initiatives and tools.



- Autogrill® uses **digital marketing** to support all initiatives, to create different relationship with people, hence more effective marketing campaigns, that build stronger brands.
- Today the customer journey is not only about food. Sets of front-end digital services (i.e. pre-order kiosks, digital boards, tablets, immediate guest feedback tools, order & pay App, geolocalized App, food & beverage delivery to airport gate, menupad, payment with mobile, self cashier) radically change and enrich the **customer experience in and out of store**. The experience becomes more interactive, personalized, memorable and transparent, increasing the guest engagement and satisfaction. For example, Autogrill® launched a deep and strong new Customer Relationship Management (CRM) program in Europe to truly and deeply engage with our people on the move.



# Our Brands

## Our strategy

The rich variety of our brand portfolio (more than 300 international and local brands) is one of the strengths of our marketing strategy. It makes the Autogrill® business model stand out from the crowd. We reinforce our competitive advantage thanks to internally-developed brands such as Bistrot & Puro Gusto because they leverage our Italian heritage of which we are proud. Bistrot leverages a partnership with UNISG. Puro Gusto leverages our Italian coffee and food know-how. We continually monitor market trends to ensure that the mix is up-to-date in every location. This brand mix is aimed at ensuring maximum satisfaction for landlords and travellers alike.

## Global brand portfolio

As a global company with advanced marketing intelligence from our in-house market research department, we understand each country's needs and adapt our brand strategy to the maturity of each geography. For North America, the key ingredients for success are partnerships with international brands, a constant flow of new concepts and the development of proprietary local brands to ensure travellers can dine on local specialties. In Europe, a similar strategy is needed, with a balanced mix of international brands and local brands, and a constant eye for innovation. We also benefit from our landlords and customers trusting our best-performing proprietary brands. For emerging markets, the best-performing internal brands and a selection of local brands offer the right choice to today's travellers.



### International franchise brands

Strategic agreements with leading world brands to provide popular choices for travellers looking for familiarity.

Around  
**40**



### National and local franchise brands

Partners with outstanding national and local brands, to capture the taste and character of specific countries and regions, and to reflect the local environment for travellers.

Almost  
**100**



### Proprietary Group brands

Internally-developed concepts provide winning formats to be replicated in other contexts.

Almost  
**150**



### Proprietary bespoke brands

Concepts created for specific locations and needs

A rich variety  
**+++**



## Bistrot success story (proprietary Group brand)

Bistrot was created by Autogrill® in 2013 through a partnership with UNISG to change the way we feed people “on the move”: the goal was to innovate by coming back to traditional and local food, with a great emphasis on high-quality local raw materials and artisanal production process. Since its first opening in 2013 in Milano Centrale, Bistrot concept expanded its boundaries, reaching new countries (Germany, Finland, Netherlands, Switzerland) and new channels (Airport and Motorways).



### Sourcing quality, locally with UNISG

“The University of Gastronomic Sciences of Pollenzo is a specialist university where the gastronomy of the future is shaped, along with a holistic and sustainable vision of food supply. Autogrill® has partnered with the University to create concepts incorporating a new vision of food & beverage for travellers combined with sustainable quality. The first achievement of this collaboration was the Bistrot Milano Centrale. The success of this innovative format prompted us to continue the journey and to work together on a new concept in Autogrill® outlets on Italian motorways. The relationship with local territories is the essence of our partnership, as well as a common endeavour to shape the future of travel food & beverage.”

CARLO PETRINI, *Founder and President, the University of Gastronomic Sciences, Pollenzo*

## The Gorgeous Kitchen, world’s number 1 airport restaurant (proprietary bespoke brand)

A unique collaboration between four female British chefs. Gee Charman (former chef at Kensington Palace), Sophie Michell (executive chef of Pont St.), Jo Pratt (Author of ‘In The Mood For Food’) and Caroline Mi Li Artiss (the first YouTube chef) have come together for the launch of The Gorgeous Kitchen in Heathrow. Specializing in beautiful global cuisine utilizing British-grown produce, The Gorgeous Kitchen is serving seasonal dishes throughout the day in an elegant space. Proof of quality is the no.1 ranking for best airport restaurant (Daily Meal).



### A Winning Partnership with Starbucks (international franchise brand)

Our partnership with Autogrill® started over 20 years ago when we only had 100 stores. Autogrill®’s food & beverage expertise together with its capability to operate in complex environments, such as airports, are fundamental to our collective success. Autogrill® works incredibly hard to deliver a great experience to their customers in every brand, and offers them a seamless experience which is very important for us. Our partnership is about trust and innovation: they embrace new concepts and challenge us to innovate, and they bring ideas forward. This means that the outcome of the partnership is bigger than the sum of its parts.”

CLIFF BURROWS, *Group President Starbucks Americas, Emea, And Teavana*

- Since 1991
- 12 countries (North America and Europe)
- Over 430 stores

## Design

All our brand concepts are translated by outstanding design as evidenced by a few examples below.



# OUR TOMORROW IS GREEN AND SUSTAINABLE



## 10 years of sustainability looking at our future



In 2015 Autogrill® celebrated in Milan the 10th anniversary of its Sustainability Report. The main goal was promoting the dialogue between companies, institutions and non-profit organizations about CSR, engaging a panel of renowned experts in order to outline the benefits of joining efforts by building strategic partnerships.

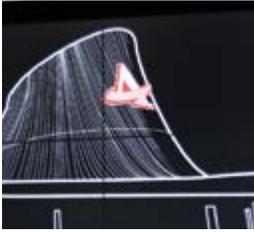
In 2005, the Group took the first step towards developing sustainability projects. In 2007, Autogrill® launched its Afuture initiative to make its business more eco-friendly and socially responsible. In 2010, its model defined a three-pronged strategic approach with the 3 "Ps": People, Product and Planet. In 2011, a three-year sustainability road map was launched setting out the priorities given to staff health and safety, reducing energy and water consumption, certificating LEED buildings and cutting back on packaging. Now, Autogrill® launches the new 2016-2018 roadmap, focusing in addition on quality relationship with workers, HR development & assessment, product and service quality&safety, product information and communication, supply chain management and waste management.

## Villoresi Est, a crucial step in Autogrill®'s sustainability efforts



The service area on the Milano-Laghi motorway embodies a number of innovative expert solutions that optimize energy consumption and resources use while safeguarding nature and the environment. Autogrill® has completely refurbished the facility adhering to the most rigorous standards for energy savings and eco-sustainability (59% reduction of CO<sub>2</sub> emissions). The site project was awarded the prestigious gold certificate issued by LEED, the leading world authority on green building, and the DFA-Quality mark for its accessibility. The building's structure, which covers 2,500m<sup>2</sup>, was entirely built from PEFC-certified glued laminated timber from sustainable forests. All the construction materials used are eco-friendly and recyclable. Villoresi Est operates using both geothermal and photovoltaic energy. A rain and groundwater collection system also reduces water consumption.





## Sustainable events at EXPO Milano 2015

### 1) Food for sustainable growth. Innovation paves the path to a “second life” on 18/09/2015

The entire morning was devoted to the topics of Sustainability and Innovation at Coca Cola Pavillon. Several start-ups (Giunko, Hangreen, OrtiAlti, The GreenWatcher) presented exhibitions of their innovative projects and discussed subjects about the second life of materials, the apps to reduce food waste, the sustainable agriculture models and the development of the sharing economy.

### 2) Food waste as a raw material of the future on 16/10/2015

On World Food Day, FCA and Autogrill® presented to the public at EXPO Milano 2015 a number of projects that recover organic waste and transform it into “alternative” raw materials for a second or even third life. Food waste can be a real source of wealth. For the occasion, Autogrill® produced a video in collaboration with environmental scientist and ecosustainable cooking expert Lisa Casali to present the integrated chain project developed with the WWF in Oasi - Bosco di Vanzago and recommend good sustainability practice with a “Km 0 & zero waste” recipe video.

## Startsomewhere®, a powerful program in North America



At HMSHost, we believe that each of us starts somewhere to make our world a better place. Our startsomewhere® initiative recognizes that it takes many small acts to build a better future. We strive to lead by example to become more sustainable in three major areas:

- The Environment
- Nutrition and Wellness
- Community Partnerships

According to our recent quantitative measurement of sustainability practices, startsomewhere® continues to have a significant impact. In 2015, HMSHost recycled approximately:

 10.3 M  
Litres of cooking oil

 3.10 M  
Kg of cardboard

 2.6 M  
Kg of coffee

 38,000  
Kg of paper

 0.72 M Kg of food  
to community food banks



## Recycling bottles into uniforms

One of Autogrill®’s spearheads is sustainable business operations and to that end, conscious choices are being made to strike a balance between CSR, costs and quality: shirts of all GrabandFly outlets at Schiphol and chairs at two venues at Amsterdam Airport Schiphol are made from recycled PET bottles. Following an extensive process, in which a range of cotton-polyester blends were tested, a shirt was developed made from 80% recycled PET bottles and 20% cotton. And now that they have been introduced at Amsterdam Airport Schiphol, the shirts are ready to be rolled out internationally to all GrabandFly locations worldwide. In doing so, Autogrill® has once again reduced its footprint on the planet.

 1 “chair is made from” >

 111 recycled plastic Coca-Cola bottles”

 1 “shirt is made from” >

 10 50cl recycled plastic Coca-Cola bottles”

# OUR CORE KNOW HOW



## 1. Guest centricity & experience – Our priority

- We know our guests very well, thanks to our Marketing Intelligence (Feel Good survey and proprietary study like “Tribes”).
- We welcome them better with our Welcome programs, new uniforms and a permanent hospitality, which is our deep DNA.
- We also engage with them via CRM programs, social media and mobile Apps.
- We offer them tailored services from our services portfolio and dedicated customized promotions.



## 2. Travel food & beverage retail expertise – Unbeatable leader, the concept factory expert

- We are a concept factory, developing new concepts and new partnerships with the best chefs and the best equipments.
- We do Research & Development with the best experts (UNISG, Identità Golose, James Beard, ...).
- We are experts with proprietary tools (Brand portfolio expertise and platform) and team (dedicated concepts expert team).
- We take care of product safety with our Quality Assurance and nutritional experts.
- We have an Italian food lovers culture and roots (one of our successful iconic products is coffee), but we are able to think global & cook local.
- Our expertise is recognized as we win industry awards.



## 3. Wherever people travel – Our footprint expansion

- We have a global footprint through three Business Units, 31 countries and four channels.
- We expanded rapidly with HMSHost International and entry into six new countries between 2012-2015.
- We take a Global Approach, as concepts and food categories are adapted to local taste.

**Our focus on sustainability is transversal. Flagships like Il Mercato del Duomo, Villorosi or Delaware Welcome Center are concretization of all our know-how.**

# AWARDS

**Autogrill®'s expertise in food & beverage and its flair for innovation is recognized in the industry.**

We are proud of our many awards and the honours we have received for our leadership in providing high-quality, innovative and eco-friendly services to the global traveller.



## 2016

**Brand Identity Grand Prix in the retail category: Bistrot Milano Duomo**

**Best Food & Beverage Partner category: HMSHost's Bushmills Bar**

**Airports Council International - North America: 4 prizes for HMSHost**

- Best Innovative Consumer Experience Concept or Practice: Channel Your Inner Chef at Chicago O'Hare International Airport
- Best New Food and Beverage (Full-Service Concept): 1897 Market at Charlotte Douglas International Airport
- Best New Food and Beverage (Quick-Service Concept): La Madeleine at Dallas/Fort Worth International Airport
- Best New National Brand Concept: Starbucks Evenings at Los Angeles International Airport

**Airport Revenue News Awards 2016: 4 prizes for HMSHost**

- Best Overall Food & Beverage Operator
- Food Operator with Highest Regard for Customer Service
- Best Food & Beverage Brand Operator
- Best New Food & Beverage Concept (1897 Market)

## 2015

**CNCC Retailer Awards (organised by National Council of Shopping Centers): Bistrot**

**World's number 1 airport restaurant by The Daily Meal: The Gorgeous Kitchen**

## 2014

**FAB Awards 2014: 3 prizes for Autogrill® Group**

- Airport Fast Food/Quick Service Restaurant of the Year - 8 oz Burger Bar Concept - Los Angeles International Airport
- Best CSR Initiative - Food Donation Program project delivered in the US
- The Judges' Award for Thought Leadership in Food & Beverage

## 2013

**Design and sustainability recognition with LEED-Gold certification and Design for All mark DfA-Quality: Villoresi Est**

**FAB Awards 2013: 5 prizes for Autogrill® Group**

- Best Railways station Food & Beverage Offer - Bistrot Milano centrale - Milano
- Best Airport Wine Bar - Cru - Denver International Airport
- Best Corporate Social Responsibility Initiative - Afuture
- Best Airport Food Court - F Concourse - Hartsfield-Jackson Atlanta International Airport
- Best Digital or Social Media Initiative - Vyaggio

# FEELING GOOD ON THE MOVE®





---

***Feeling good on the move®***

[autogrill.com](http://autogrill.com)



# Latest from Autogrill®

## **Headquarters**

Centro Direzionale Milanofiori - Palazzo Z, Strada 5,  
20089 Rozzano (Milano), Italy  
Tel. (+39) 02 4826.1