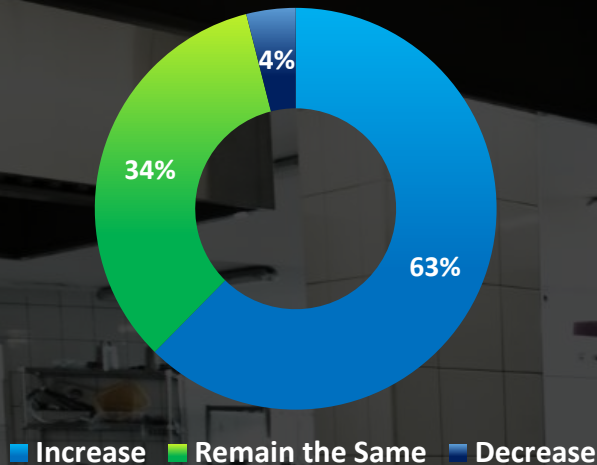
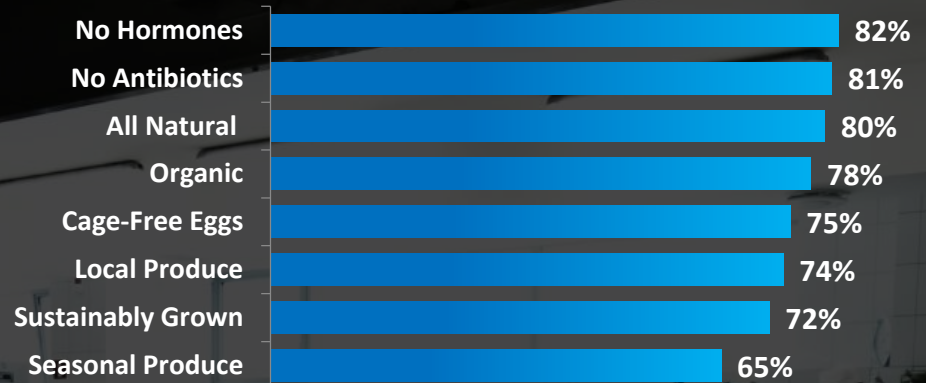


EXPLORING THE RISE OF OFF-SITE FOODSERVICE CENTRAL KITCHENS

Q. In the next two years, do you expect your use of central kitchens to increase, decrease or stay the same?

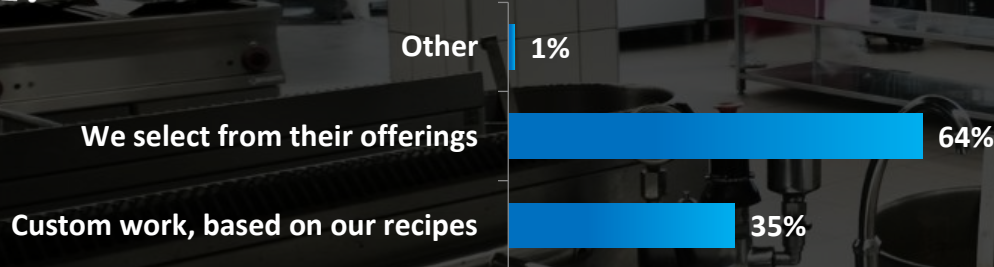


Q. Importance of “Responsible” Claims
To what degree are the following claims important?*



*Top 2 Box Ratings: 1= “Not Important at all” & 5 is “Extremely important”

Q. What role do off-site kitchens play to your culinary innovation process (e.g., adding new dishes /LTOs)?



FSIP'S TAKE



Central kitchens appear to have a substantial degree of autonomy over the offerings that they produce. Nearly two-thirds (64%) of operators reported that when they turn to a central kitchen for a new item or limited-time offer, they are choosing from the central kitchen’s existing offerings. This is especially evident with c-stores. Still, there is opportunity for custom work; 35% of operators report that the culinary innovation process is collaborative with central kitchens in this way.