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New Year's Message from our Chief Executive

To all our Customers , Friends and Readers,

This is the last edition of our fortnightly e-zine in 2011.

The purpose of the e-zine is to keep you informed of the fast moving events in the food industry. This year we also introduced TOP 9 For Friday to brief you on consumer and product trends from around the world which has proved hugely popular.

2011 has been a tough year in our industry characterised by rising raw material prices and uncertain consumer demand. Our hope is that our political leaders across Europe provide a clear direction out of the debt impasse as a matter of priority in 2012.

In Dawn Farms , our new year's resolution is to strive to bring quality and value driven solutions to our customers so that you in turn can stimulate interest and activity with your own customers. We believe that by working together with you, we will be best placed to take advantage of the opportunities that will undoubtedly emerge in the year ahead.

On behalf of all my colleagues , may I take this opportunity to thank you for your support this year and we wish you season's greetings and a healthy and prosperous new year.

Larry Murrin
Chief Executive Officer

What consumers will want from restaurants next year

Analysts and restaurateurs are bracing for a slow dining-out start for 2012. Some forecasters say consumers will continue to trade down to less pricey meals, but many say the diners' sharp focus on value doesn't just mean price. Successful eateries will be the ones offering the right combination of food, service and environment for the right price, says NPD Group's Bonnie Riggs.

<http://www.rmgmagazine.com>

Sushi bar owner wraps up Tortilla

The owner of Yo! Sushi restaurants has paid £3.5m for a stake in Tortilla, a fast-growing Mexican chain. The burrito and taco restaurant was founded by Brandon Stephens, a Californian who moved to England in 2003. Tortilla has since grown to seven outlets, all in the capital, with two



more in the pipeline.

<http://www.thesundaytimes.co.uk>

Two-speed highstreet as wealthy shoppers boost sales

Wealthy shoppers are boosting sales for luxury goods and London department stores creating a “two-speed” high-street at the start of a “make or break” shopping week for retailers. As a report warned that shops are facing a brutal “austerity Christmas”, John Lewis defied the gloom by achieving its best ever weekly sales figure last week. The department store said it notched up sales of £133.1m for the week to December 17. Sales were up 7.8pc on the previous week and 10.6pc compared to the same week last year. Its online operation also enjoyed a record week, with takings up 42pc on last year. Lesley Ballantyne, director for operation development at John Lewis, conceded that the figures were boosted by higher prices, a favourable comparison to last December’s snowy weather conditions and the benefit of three new stores. However, she said like-for-like sales were up significantly.

<http://www.telegraph.co.uk>

Wendy's, Subway cut prices

Subway's \$5 foot long program has proved perennially popular, but the sandwiches still cost five times as much as the dollar-menu items at many quick service rivals, spurring the addition recently of a \$2 sandwich promotion. Wendy's has also found a way to fight back in the low-priced category, with new W burgers priced just under \$3.

<http://www.qsrmagazine.com>

PERIScope 6 – “A food by any other name?”

As part of our coverage of the results of PERIScope 6 - Bord Bia's biennial study that tracks the Irish, British and Northern Irish consumer – this week we focus on the sixth theme; “A food by any other name?” and identify the main findings.

<http://www.bordbia.ie>

QSR to propel growth in Dutch Foodservice

The economic recession has clearly proved beneficial for the Dutch Quick Service Restaurant (QSR) channel as consumers opt for more affordable foodservice choices and down trade from full-service restaurants.

<http://www.bordbia.ie>

Smashburger CEO talks global expansion

Four-year-old Denver-based Smashburger aims to become the biggest fast-casual better-burger chain in the world, and the company began its global push this year with plans to open eateries in the Middle East and Canada. Chairman and CEO Dave Prokupek shares insight into the chain's plans and the importance of finding the right partners. <http://smartblogs.com>

Domino's chief aims broadside at rivals

At the headquarters of Domino's Pizza outside Milton Keynes, next to its new hangar-like dough plant, Lance Batchelor applies naval tactics to the business of selling pizzas. “Engage the enemy more closely,” says the former submariner, quoting Lord Nelson, his hero. “That attitude drives me.” Back on dry land, Mr Batchelor, the incoming chief executive, adds: “There’s a huge buzz about operating in a highly competitive environment. “Strong competition keeps us on our toes,” he says, referring to the importance of responding quickly to customer orders. It is not an approach Mr Batchelor plans to change when he takes over from Chris Moore on December 26.

According to the company, the average delivery time from when an order is placed is 23 minutes. Mr Batchelor, who was recruited from Tesco, quit the Royal Navy to enter the corporate world because life became “much less exciting” with the fall of the Soviet Union. Domino’s has some of the best growth figures in the food industry – an average of 10 per cent like-for-like sales growth a year since 2002 – but there are recent signs of a slowdown. The shares fell 10 per cent on the day of its latest trading statement in September after it revealed like-for-like sales for the year of 2.9 per cent, compared with 12.5 per cent in 2010 in spite of the roll-out of new pizza ranges and a higher advertising spend.

<http://www.ft.com>

Report: Breakfast business ripe for more growth

Restaurants have steadily grown their breakfast business to about 12% of total sales, and there's still significant room to expand, according to a report from Technomic. Consumers are willing to pay more for convenience and speedy service in the morning, and 33% of coffee drinkers said they're loyal to eateries that serve their brand of java.

<http://www.pizzamarketplace.com>

Yum! Brands sees jump in international earnings

Yum! Brands expects to see 75% of its profit from international operations this year, and global operations have more than made up for softer U.S. sales, CFO Rick Carucci said. The parent of chains including KFC, Pizza Hut and Taco Bell expects China to contribute \$900 million in profit, and small-but-growing markets India, France, Germany and Russia are on track to generate profits of about \$100 million each by 2020.

<http://www.marketwatch.com>

Chinese pressure hits food producers

Escalating local competition is forcing Nestlé & Danone, two of the world’s biggest food companies, to overhaul their business models in China. The moves illustrate how multinationals, which have flocked to emerging markets including China in a bid to offset sluggish market growth in the developed world, are increasingly coming under pressure from savvy local rivals. Nestlé, which is closing one of its three ice-cream factories in mainland China and rowing back on retail sales in Shanghai, is to focus on more profitable markets in the country and out-of-home sales, such as in restaurants. France’s Danone is suspending production at its Shanghai plant to concentrate on more upmarket offerings.

<http://www.ft.com>



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