

Ghost Kitchens, Virtual Restaurants, and a Delivery-Optimised Future

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Table of Contents

INTRODUCTION

Scope Key findings

EXECUTIVE SUMMARY

Ghost kitchens, virtual restaurants, and physical restaurants Ubiquitous delivery points to a future of less cooking, more services More channels becoming "meal fulfilment centres"

FUTURE SCENARIOS

Mapping key next steps for the food industry

SIZING THE POTENTIAL FOR GHOST KITCHENS

On-demand delivery is changing the entire food and drink industry How big is this now? Key markets with summaries Lower prices for delivery could drive sea change in eating habits How much spending is in play for ghost kitchens? Key drivers also represent major potential barriers

STRATEGIES

Examples of key business models Wow Bao launches national ghost kitchen programme Ghost kitchen operators add takeaway, food court concepts Rebundling the meal: Kraft Heinz's "Honig Freshly Prepared" IFood's Loop targets the commodity lunch Nice Day Chinese aims to aggregate US Chinese food Rebel Foods expands third party Launcher programme

REGIONAL FOCUS: LATIN AMERICA

Latin American context boosts delivery beyond pandemic Decentralisation creates opportunities in mid-sized cities Traffic, congestion in cities drives ghost kitchen growth Challenges to overcome in Latin America Rappi and Muncher partnership allows quick geographic expansion PedidosYa grows through its own private label virtual brands Packaged food players roll out pop-up ghost kitchens Key Takeaways Mapping key next steps for the food industry Expanding delivery forces soft drinks brands to rethink sales models Ghost kitchens will force new beverage business models Distributed "food factories" could reshape cities New omnichannel brands plot new path-to-purchase

CONCLUSIONS

Key takeaways

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