



**BURN**  
slices  
URBAN GOURMET SLICES

# MARKET SIZE

## TOP DOWN ANALYSIS



- Fast casual is in steady growth.
- USA is still the leading country.
- Europe and Asia are still in their infancy with wide growth opportunity.

## MARKET SIZE FAST CASUAL

# MARKET SIZE



**\$825bn**

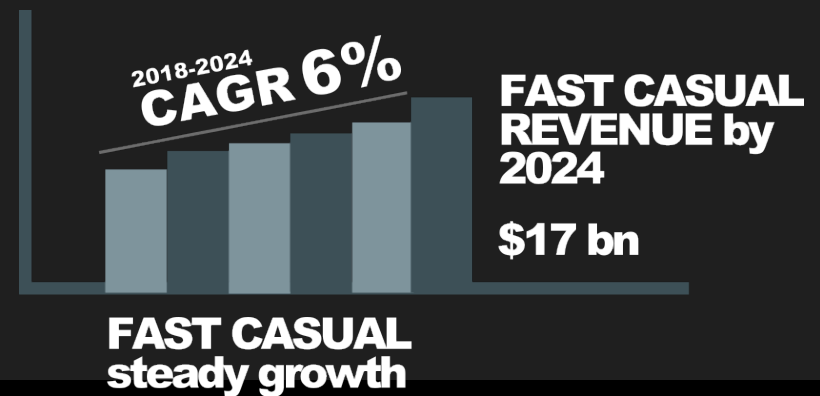
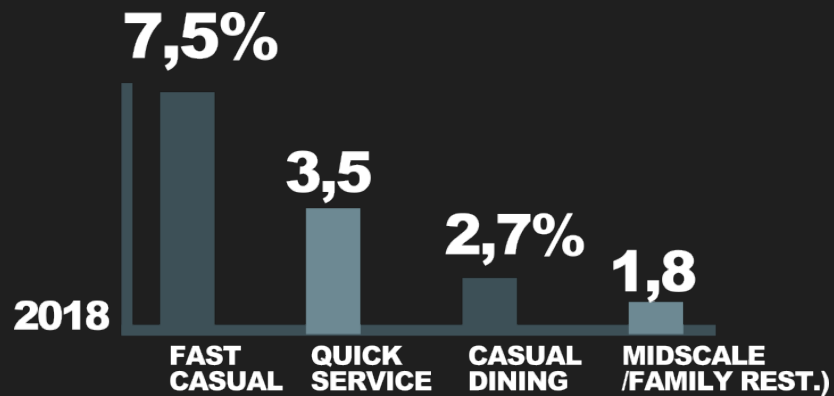
data: National Restaurant Association (NRA).



**\$508bn**



**\$624bn**



# FORECAST

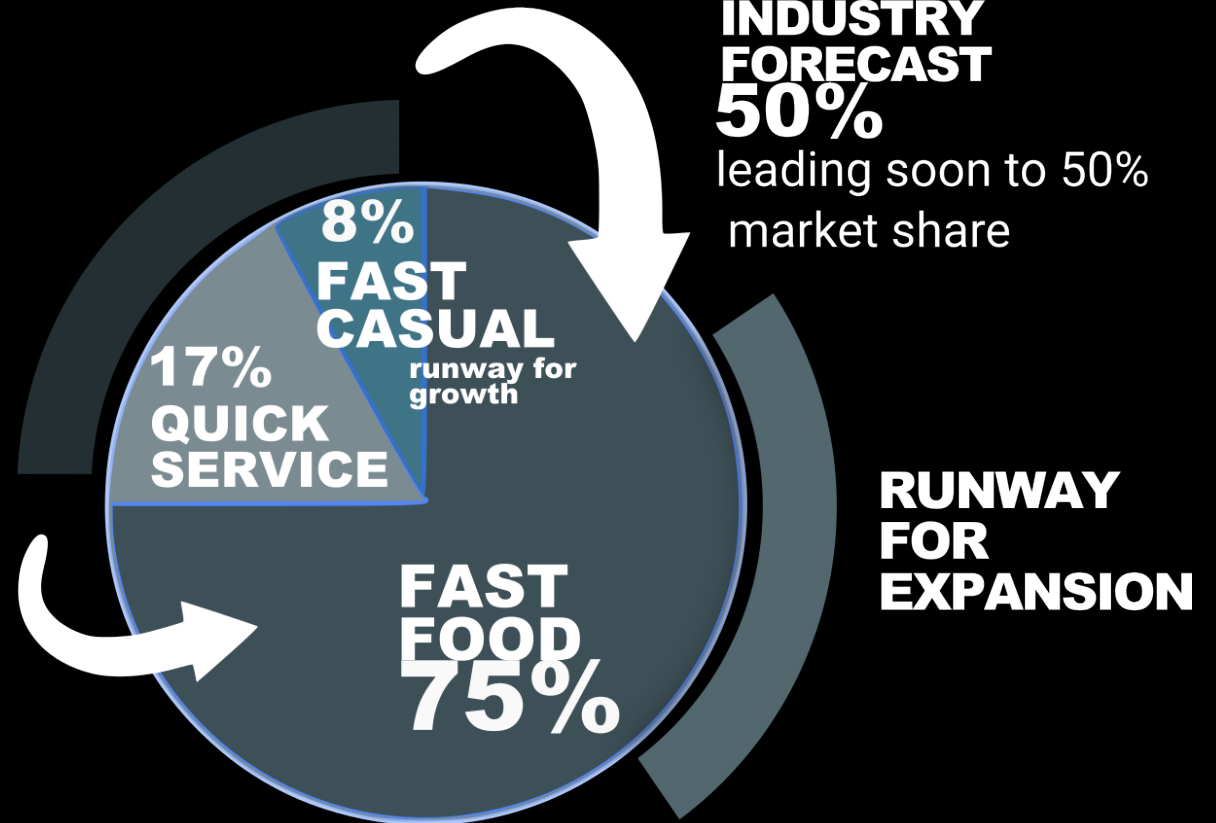


**25,312  
FAST CASUAL  
UNITS**

total fast casual units  
in operation in the US

**7,5 %  
2018** ↑

**USA**



# EUROPEAN GROWTH



**GROWTH**  
**\$10.3b**   
**2018-2021**

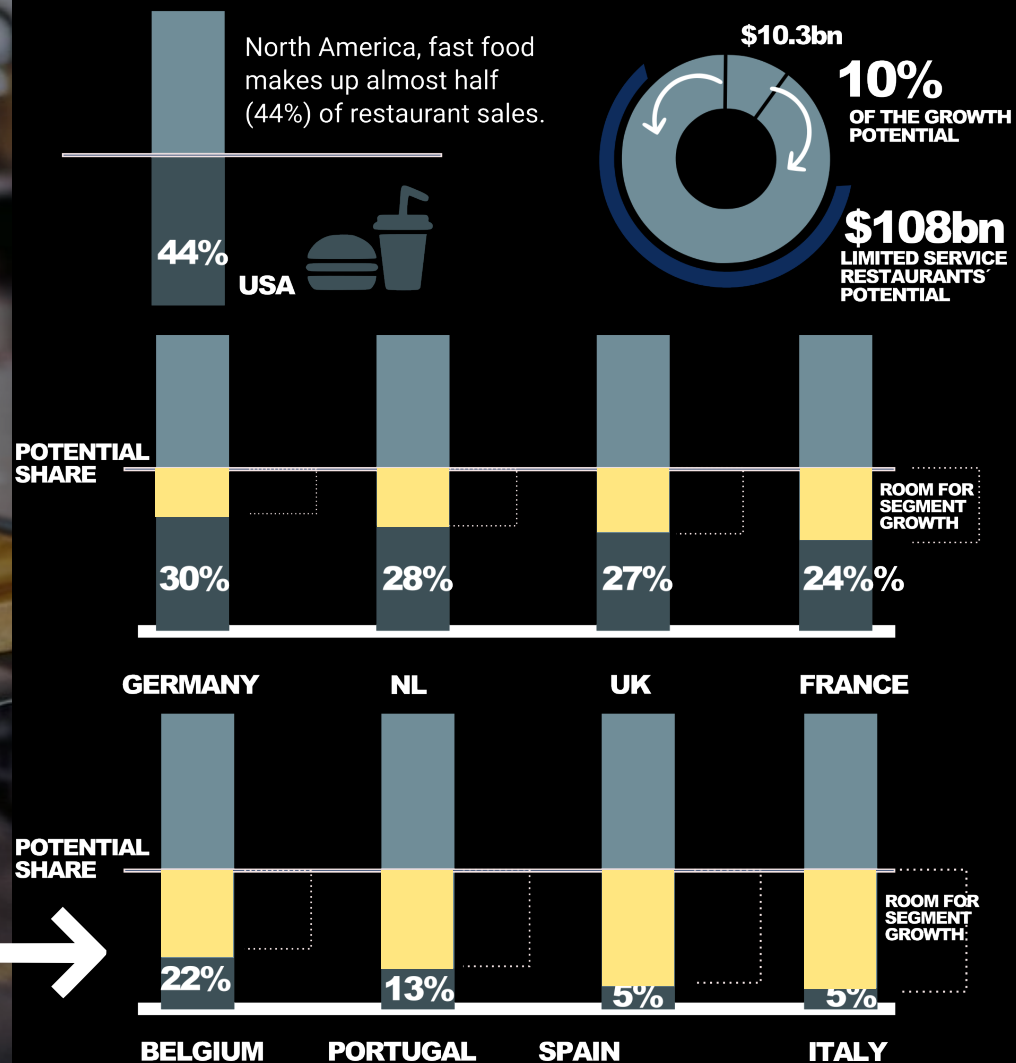
**BELGIUM**  
**FRANCE**  
**GERMANY**  
**ITALY**  
**THE NETHERLANDS**  
**PORTUGAL**  
**SPAIN**  
**UK**

# FAST CASUAL

IN EUROPE, IS STILL IN ITS INFANCY

EUROPE

ROOM FOR GROWTH





# MARKET SIZE

BOTTOM UP



Estimating potential sales

# POTENTIAL OUTCOME FROM SALES

GERMANY  
DOMESTIC  
MARKET

ENTRY  
LEVEL



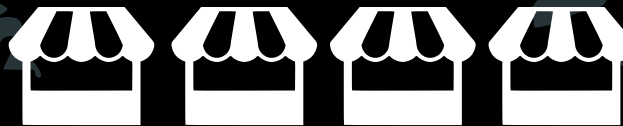
57 mln year / revenue

30

UNITS

EUROPE

REALISTIC  
SUCCESS  
SCENARIO



189 mln year / revenue

100

UNITS ★

GLOBAL  
BRAND

BEST  
CASE  
SCENARIO



1.10 bn year / revenue

10% OF THE MARKET SHARE

900

UNITS

# MEDIUM/ SIZED STORE RENDERING CONCEPTS

45 M<sup>2</sup>

90 M<sup>2</sup>

**BURN**  
slices  
URBAN GOURMET SLICES

**BURN**  
slices  
URBAN GOURMET SLICES

