



Foodservice Equipment in Australia

1st edition
2007 – 2011



EXTRACT TO INDICATE THE GENERAL NATURE OF THE REPORT

FOOD & BEVERAGES

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BIS Shrapnel contact:

Sissel Rosengren
BIS Shrapnel Pty Limited
Level 8, 181 Miller St
North Sydney NSW 2060
Australia
Tel. +61 (0)2 9959 5924
Fax +61 (0)2 9959 5795
email: temmerson@bis.com.au
srosengren@bis.com.au

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*This report has been written by Jan Roach with assistance from Sissel Rosengren and Kate Guerrero.
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Contents

Introduction	i
1 The Australian foodservice equipment market.....	3
1.1 Product categories.....	5
1.1.1 Preparation equipment.....	5
1.1.2 Cooking equipment.....	6
1.1.3 Refrigeration equipment.....	7
1.1.4 Washing equipment	7
1.2 Foodservice channels.....	8
2 The Australian Foodservice market.....	11
2.1 <i>Foodservice</i> market size	12
2.2 Institutional and commercial channels	13
2.3 Key trends and developments in the Australian <i>foodservice</i> market	17
2.4 Main cuisine types.....	19
3 Market structure and drivers	23
3.1 Hospitals.....	25
3.1.1 Channel structure.....	25
3.1.2 Main equipment used in the channel	25
3.1.3 New versus second hand equipment.....	26
3.1.4 Replacement rates and life cycle	26
3.1.5 The purchasing process.....	26
3.1.6 Importance of price	27
3.1.7 Key drivers	27
3.2 Nursing homes	28
3.2.1 Channel structure.....	28
3.2.2 Main equipment used in the channel	28
3.2.3 New versus second hand equipment.....	28
3.2.4 Replacement rates and life cycle	28
3.2.5 The purchasing process.....	29
3.2.6 Importance of price	29
3.2.7 Key drivers	30
3.3 Schools.....	31
3.3.1 Channel structure.....	31
3.3.2 Main equipment used in this channel.....	31
3.3.3 New versus second hand equipment.....	32
3.3.4 Replacement rates and life cycle	32
3.3.5 The purchasing process.....	32
3.3.6 Importance of price	33
3.3.7 Key drivers	33
3.4 Tertiary institutions	34
3.4.1 Channel structure.....	34
3.4.2 Main equipment used in the channel	36
3.4.3 New versus second hand equipment.....	36
3.4.4 Replacement rates and life cycle	37
3.4.5 The purchasing process.....	38
3.4.6 Importance of price	38
3.4.7 Key drivers	39

3.5	Workplace canteens/private	40
3.5.1	Channel structure.....	40
3.5.2	Main equipment used in the channel	40
3.5.3	New versus second hand equipment.....	40
3.5.4	Replacement rates and life cycle	40
3.5.5	The purchasing process.....	41
3.5.6	Importance of price	41
3.5.7	Key drivers	42
3.6	Government canteens incl. military & correctional	43
3.6.1	Channel structure.....	43
3.6.2	Main equipment used in the channel	43
3.6.3	New versus second hand equipment.....	43
3.6.4	Replacement rates and life cycle	43
3.6.5	The purchasing process.....	44
3.6.6	Importance of price	44
3.6.7	Key drivers	45
3.7	Restaurants	46
3.7.1	Channel structure.....	46
3.7.2	Main equipment used in the channel	46
3.7.3	New versus second hand equipment.....	46
3.7.4	Replacement rates and life cycle	46
3.7.5	The purchasing process.....	47
3.7.6	Importance of price	47
3.7.7	Key drivers	48
3.8	Cafés	49
3.8.1	Channel structure.....	49
3.8.2	Main equipment used in the channel	49
3.8.3	New versus second hand equipment.....	49
3.8.4	Replacement rates and life cycle	49
3.8.5	The purchasing process.....	50
3.8.6	Importance of price	50
3.8.7	Key drivers	50
3.9	Hotels	51
3.9.1	Channel structure.....	51
3.9.2	Main equipment used in the channel	51
3.9.3	New versus second hand equipment.....	51
3.9.4	Replacement rates and life cycle	52
3.9.5	The purchasing process.....	52
3.9.6	The importance of price	53
3.9.7	Key drivers	53
3.10	Clubs	54
3.10.1	Channel structure.....	54
3.10.2	Main equipment used in the channel	54
3.10.3	New versus second hand equipment.....	54
3.10.4	Replacement rates and life cycle	54
3.10.5	The purchasing process.....	55
3.10.6	Importance of price	55
3.10.7	Key drivers	56
3.11	Fast food/QSRs	57
3.11.1	Channel Structure	57
3.11.2	Main equipment used in the channel	58
3.11.3	New versus second hand equipment.....	58
3.11.4	Replacement rates and life cycle	59
3.11.5	The purchasing process.....	59
3.11.6	Importance of price	59
3.11.7	Key drivers	60

3.12	Caterers.....	61
3.12.1	Channel structure.....	61
3.12.2	Main equipment used in the channel.....	61
3.12.3	New versus second hand equipment.....	61
3.12.4	Replacement rates and life cycle.....	61
3.12.5	The purchasing process.....	62
3.12.6	Importance of price.....	62
3.12.7	Key drivers.....	63
3.13	Function centres.....	64
3.13.1	Channel structure.....	64
3.13.2	Main equipment used in the channel.....	64
3.13.3	New versus second hand equipment.....	64
3.13.4	Replacement rates and life cycle.....	64
3.13.5	The purchasing process.....	65
3.13.6	Importance of price.....	65
3.13.7	Key drivers.....	66
4	Supplier issues.....	69
4.1	Awareness of suppliers.....	69
4.2	Gap Analysis.....	72
5	Service & maintenance.....	87
5.1	Methods of servicing equipment.....	87
6	Outlook to 2011.....	95
6.1	Macroeconomic Overview — Australia.....	95
6.2	Foodservice equipment outlook.....	97
6.2.1	The institutional sector.....	98
6.2.2	The commercial sector.....	98
6.3	Equipment categories.....	98
7	Conclusions & recommendations.....	101

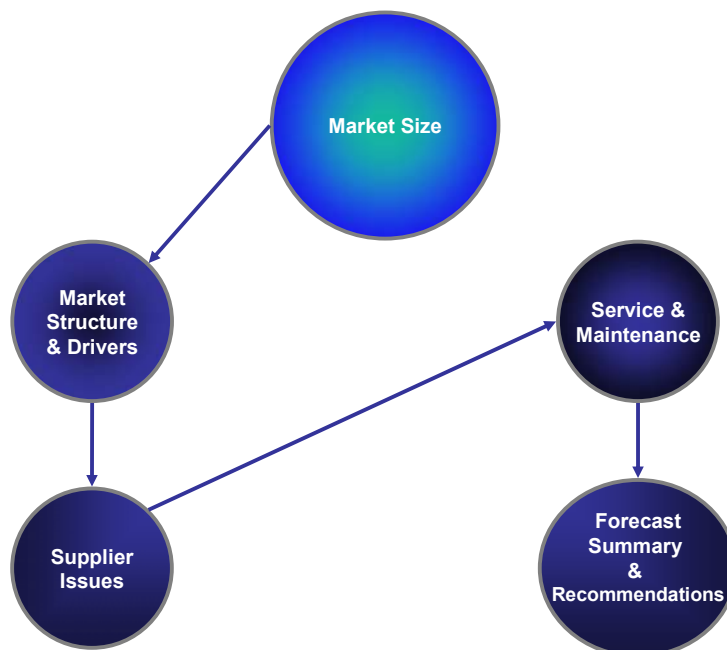
List of Tables

Foodservice equipment products	3
Average value of foodservice equipment per outlet by channel.....	8
Institutional foodservice outlets – 2007	15
Commercial foodservice outlets – 2007	16
Institutional outlets.....	24
Commercial outlets.....	24
Number of hospitals in Australia, 2004/05.....	25
Number of available hospital beds in Australia, 2004/05	25
Number of schools and pupils in Australia, by state, 1998-2005	31
Number of full and part-time university students in Australia, 1998–2003.....	35
Number of full and part-time* TAFE students in Australia, 2000 and 2003 ('000)	35
Average age of equipment – years	52
Institutional sector.....	70
Commercial sector.....	71
Foodservice equipment market growth per annum.....	97

INTRODUCTION

This report is the first edition of a comprehensive study of the Foodservice Equipment Market in Australia with forecasts to 2011. It complements our study of the Australian foodservice sector. This study provides our estimate of the size of the equipment market.

The following chart represents an outline of the key modules comprising the report.



- *Market size* – includes the total market size value of each of the four product categories we cover in this report; preparation, cooking, refrigeration and washing equipment as well as the value of 30 separate items of equipment. We also analyse the percentage of the category each product represents.
- *Market structures and drivers* – looks at trends in the Australian foodservice sector that ultimately influences the purchase of equipment. We also examine, within each channel, a definition of outlet types included, main equipment used, and the propensity to purchase new versus second hand equipment. The current average age of equipment within channel, the purchasing process, the importance of price and key drivers affecting this channel.
- *Supplier issues* – provides an indication of the awareness among outlets of a range of brands/suppliers. We also present gap analysis which shows the performance of several major suppliers measured against factors considered when choosing a brand/supplier.
- *Service and maintenance* – examines methods used for servicing of equipment, companies or systems for servicing and maintenance, rates of payment, the number of service providers, satisfaction with current arrangements and a propensity to change arrangements. We also investigate the importance of availability of spare parts and the relative cost of servicing against the original cost of equipment.
- *Forecasts, summary and recommendations* – provides our forecast for the Australian economy to 2011 and our forecast for foodservice equipment in Australia for the same period.

Sample and methodology

To gain an understanding of this market the authors of this report undertook several *qualitative* interviews with foodservice outlets, including the education sector, hospitals and nursing homes, restaurants, cafés, hotels, fast food outlets and clubs.

From this information we were able to develop a structured questionnaire used in the collection of data, which enabled us to quantify the market. To ensure a representative sample for the *quantitative* interviews we were able to use BIS Shrapnel's proprietary databases, and other on-line databases and industry information.

The *quantitative* interviews were conducted in Sydney, Melbourne, Brisbane, Adelaide and Perth with outlets in the institutional and commercial sectors.

These interviews were undertaken with:

Institutional

- *Hospitals* – public and private, small and large
- *Nursing homes* – public and private, small and large
- *Schools* – public and private day schools and boarding schools
- *Tertiary institutions*
- *Private workplace canteens*
- *Government canteens* – including the military and correctional facilities.

Commercial

- *Restaurants* – low end, mid range and fine dining
- *Cafés*
- *Hotels and motels* – 2/3 star and 4/5 star
- *Clubs* – a range of small, medium and large
- *Fast food/QSRs* – chains and independents
- *Caterers* – sole operators/functions and commercial caterers
- *Function centres*.



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For further enquiries please contact:

Sissel Rosengren (srosengren@bis.com.au) at our Sydney office

or

Kevin McDonald (kmcdonald@bis.com.au) at our Melbourne office.

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