



2016-2017 ACTIVITY REPORT





# RECTO VERS

What are people looking for at break times?  
Obviously the answer isn't the same for everyone.  
That's why we strive to make each experience  
unique — whether at school, at work or when traveling.  
Come backstage with us to discover six examples  
of successful breaks.



**02**

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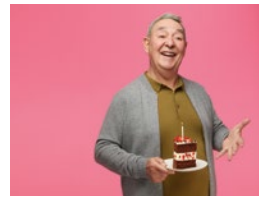
**AT WORK**  
IN HER BUBBLE



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**AT THE HOSPITAL**  
CALM AND CLEAN



# IN HER BUBBLE

## WHAT SARA WANTS

To use her lunch break to save time later in the day, by ordering something to cook for the evening meal or collecting her ironing.





## WHAT WE'VE PUT TOGETHER FOR SARA



HEADQUARTERS OF BNL  
ROME, ITALY



BUSINESS & INDUSTRY

**W**hen in Rome, do as the Romans do — and so we begin our day with a coffee! The café we choose is particularly typical of Rome, with a crowd gathered at the marble-topped counter. Office workers in smart suits, maintenance staff, contractors and interns all mingle, greet each other and chat. Coffee after coffee arrives and the whole place has an urban Italian buzz. But we're not in a street café — we're two floors up, in the heart of the new headquarters of BNL Gruppo BNP Paribas (the former Banca Nazionale del Lavoro).

### Everything starts with a coffee in Italy

*“BNL wanted to give its employees an offering similar to what they can find in downtown Rome. So we started to craft our idea of break time based on coffee,*

*because having a coffee is an essential social ritual of everyday life in Rome,”* explains Isabelle Renoirte, Elior's site director in charge of BNL's headquarters. The bank's teams gradually head off to their offices but the Melò café stays open all day. After 9 a.m., the crowd gives way to smaller groups, with people coming in to discuss a current project, receive a visitor in a cozy atmosphere or reply to emails without being disturbed. Nearby, there is even a “silent room” where people can work in absolute peace and quiet.

### Even the meals are modern in these offices

We now follow Isabelle for a tour of the offices. Inaugurated in May 2017 and covering 12 floors, BNL's new headquarters are ultra-modern, both in terms of design and working methods. Open spaces and desk sharing are de rigueur for the 3,400 people who work here.

As we make our way down a corridor we meet Marco, Elior's main point of contact



**Each morning people gather at the bar counter for a traditional caffè — an essential ritual of everyday life in Rome.**

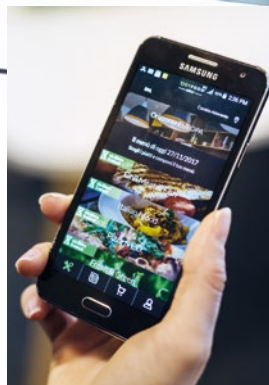






← People come to the Melò cafeteria to discuss a current project, receive a visitor in a cozy atmosphere or reply to emails without being disturbed.

**BNI's new headquarters are ultra-modern, both in terms of design and working methods, with open spaces and desk sharing.**



← Guests can look at the day's menus on the JoyFood app.

at BNL. He is on his cellphone, looking at the day's menus on the JoyFood app. When it comes to ordering and paying for his meal online he hesitates between a sit-down lunch or a take-away option. Isabelle helps him by convincing him to come and eat with us.

### Seven restaurants in one

We go back down to the third floor before the lunchtime crowds arrive to discover the food court created by Elior, whose teams are busy preparing for each of the seven different eateries offered in this impressive light-filled space. "We know that what people want to eat not only changes from one person to another but also from one day to the next. That's why we decided to offer the widest possible choice," explains Isabelle.

Variety is definitely on the menu, with an Italian pasta corner, a pizzeria, a fresh fruit and vegetable salad bar, a steak grill, a space dedicated to the healthy Mediterranean diet, recipes designed by celebrity chefs and much more.

Marco doesn't take long to join us and sits down on one of the colorful banquette seats. "We cater for many different profiles of guest here — groups of colleagues eating together, people having one-on-one lunches or sole diners. The atmosphere is always calm and intimate, even though 2,000 people have lunch here every day," says Isabelle. Here, Elior has successfully risen to the challenge of creating a dining space and food offering that help people recharge their batteries in a warm and friendly atmosphere. Buon appetito!



**Elior seeks to cater for all tastes, which can vary not only from one person to another but also from one day to the next. The ever-successful traditional pizza is homemade.**



**In the food court, the atmosphere is calm and intimate, even though 2,000 people have lunch there every day.**





**CULTURE**  
**HYGGE!**

The word used to describe the specific Danish lifestyle is hygge and it was by putting this very fashionable principle at the heart of its offering that Elior won the catering contract for the Chartres, France-based plant of Novo Nordisk Productions (a Danish pharmaceutical group). The tailored concept that Elior has developed for the company’s 1,100 employees is focused on reducing sugar and fat, based on fresh and organic produce served via a “help yourself” buffet to reduce the risk of food waste, in a lounge-style cafeteria. There are waste sorting tables and fresh fruit is available on each floor of the building. Altogether very hygge!



**KEY FIGURE**  
**32,000**

The number of meals served by Elior every day to the teams at Tesco – the UK’s leading retailer.

**PERSONALIZATION**  
**VITA MOJO**

In the UK, Elior works with Vita Mojo – the world’s first ultra-personalized restaurant. Vita Mojo’s software allows guests choose their own combination of ingredients to create their ideal menu both in terms of taste and nutrition.



**RAISING AWARENESS**  
**LÉO’S BASKET**



In Arpège’s restaurants in France and at leo.arpege-restaurants.fr, guests can find out more about the produce we serve and what we focus on in our supplies (local, organic, non-threatened species, animal welfare, etc.).

**INNOVATION**  
**APPS: THE KEY TO SUCCESS**

In Spain, Serunion won over PSA and Movistar with an offering that showcases innovative solutions, including TimeChef – a mobile app that guests can use to find out information about menus and to order and pay on line, and Vitalista – which proposes vegetarian and organic meals delivered to the office, along with advice from a professional nutritionist.



**HABITS**  
**23%**



This is the percentage\* of people whose working hours change significantly from one day to the next. Elior meets the needs of these workers by creating ever-more flexible and personalized catering solutions.

\*Based on a Sociovision survey for Elior Group carried out in Spain, France, Italy, the United States and the United Kingdom







# VEGGIE- LICIOUS!

## WHAT LILY WANTS

To chill out between classes,  
catch up with friends and stand by  
her convictions by having a healthy,  
vegetarian meal.

Every morning, the students at Hugh Baird College are offered a free slice of toast and a hot drink at Costa Coffee. →



## WHAT WE'VE PUT TOGETHER FOR LILY



HUGH BAIRD COLLEGE  
LIVERPOOL, UNITED KINGDOM



EDUCATION

**F**ollowing the students making their way to Hugh Baird College in Liverpool (UK) feels like a blast from the past. It's 8 o'clock in the morning and it's obvious that early rising is still as difficult for this generation as it was for us. As they enter the main building, most of the students head straight for Costa Coffee on the first floor.

### Filling up on energy

In order to meet the needs of some 5,000 students, Elior has signed a partnership with this well-known main street brand. In association with the College, the students are offered a free slice of toast and a hot drink every morning, all served with a smile. *"Since we developed this offering a lot more students turn up on time for class!"* jokes Karen Beckley – a Commercial Catering Manager for Elior in the UK.

While Costa Coffee is the early morning hotspot, the place to be for the mid-morning break is often Coffeeco on the second floor, where baristas serve fair trade drinks. If students feel peckish they can tuck into a pastry or even make themselves a wrap or sandwich from a range of fillings.

### A bite to eat with friends

When stomachs really begin to rumble maybe it's time to set off for The Balliol Kitchen, which is also on the second floor. This restaurant proposes a wide range of options to satisfy all tastes and appetites, including traditional recipes like fish and chips, various dishes of the day and take-away solutions. The salad bar and nuggets menus are particularly popular options, with groups of students coming to pick up meal boxes and eating lunch on the way to their next class.

Many students also stay in the dining area to socialize with their friends. A few of them greet a young man in a chef's hat and apron as he comes through to the dining area from the food counters. It's Sean who is studying hospitality at the college and is doing work experience with Elior as part of his course. *"We offered to take on four Hugh Baird College hospitality students each term to work in our restaurants under a work experience program,"* explains Karen.





← The salad bar and nuggets menus are particularly popular with students.



There is a wide range of options to satisfy all tastes and appetites, and guests can even make up their own wraps from a selection of fillings.





### A healthy mind in a healthy body

Sean has been following this program for several months and is extremely enthusiastic about it: *“When I compare my experience with that of other students, I realize how lucky I am to be able to try my hand at everything here. My training covers a wide range of subjects including working in the kitchen and the serving area, learning to be a barista and building up my sales skills. I also appreciate the practical side of it as I come directly here after I finish my classes so I don’t waste any time commuting.”*

Karen adds: *“Our commitment to these students goes above and beyond just opening up the doors to our kitchens. We also help them prepare for interviews and develop their talents. We offer them the fullest possible support so they can enter the labor market with real skills and expertise. Elior’s objective in the world of education is to nourish both the body and the mind!”*



**Sean, a hospitality student, is one of four Hugh Baird College hospitality students taken on by Elior at its on-campus restaurants as part of a broad work experience program that covers cooking to serving.**



**APPS****ELIOR'S GEEK LIST**

In 2017 we were more connected than ever, adapting to new usages with dedicated apps. Our geek list now includes:

**bon'App (France) and Educa (Spain):** these are Elior's first apps dedicated to school meals.

**WeeklyConnect:** a solution that enables higher education students in France to book their meals online.

**Yoyo Wallet:** a mobile app that provides quick pay solutions and loyalty programs and is very popular in the UK.



**JoyFood:** a digital ecosystem in Italy that allows guests to view, order and pay for their meals online.

**Kookiz:** a tablet that enables staff to easily carry out compulsory hygiene controls.

**KEY FIGURE****5,500**

The number of students at the University of Wisconsin White-water (USA) who enjoy A'viands' new dining program which combines national franchises with own-brand concepts.

**NUTRITION****DISCOVERING THE MEDITERRANEAN DIET**

Thanks to a partnership set up with the famous Italian pharmacological research institute Mario Negri, based in Milan, Elior is offering its guests the possibility of experimenting with the Mediterranean diet and discovering its numerous health benefits, both in restaurants and through the JoyFood app.

**SUPERFOOD****WOULD YOU LIKE A BIT MORE SEAWEED?**

Which plant has the same or even better nutritional qualities as animal protein, has no negative impact on the environment and is also helping develop a new industry in Brittany, France? Seaweed of course! Ansamble — one of Elior Group's French subsidiaries — has teamed up with Sens'alg to incorporate this super food into its catering offerings.

**SUPPLIERS****ORGANIC & LOCAL**

Elior and Acade & Bio opened the Greater Paris region's first organic/traditional vegetable processing facility, which will be able to supply fully-local produce to over 200,000 children in 700 school restaurants managed by Elior.





# HOME SWEET HOME

## **WHAT ANDRÉ WANTS**

To be on top form to see his grandchildren who have come by to celebrate his 79<sup>th</sup> birthday and to share some happy family time.



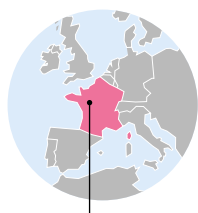








## WHAT WE'VE PUT TOGETHER FOR ANDRÉ



CARE HOME, SAINT-LOUANS PRIORY  
CHINON, FRANCE



HEALTHCARE

**V**ery early in the morning, an Augustinian nun from the Saint-Louans priory opens the door and leads us to the vegetable garden, where we are met with an unusual sight. The chef and the gardener are already out there picking seasonal vegetables together – potatoes, carrots, pumpkins and leeks – which will be used to make lunch and the evening soup for the residents of the care home for the elderly located just next door.

### Highlight of the day

The chef Benoit Nicou has been with Elior for almost 20 years. When he began

working at the care home at the Saint-Louans priory in Chinon some ten years ago, his job took on another dimension, which he enthusiastically shares with us: *“We provide an extremely high-quality catering service here, with 95% of our meals homemade and many ingredients sourced from local producers. But what I like best is that we go above and beyond just supplying meals. At the care home, meal times set the pace of the day. They are moments when we can engage with and offer enjoyment and comfort to the residents, who are sometimes lonely or ill. Our work makes a real contribution to their well-being and that makes us happy too!”*





← Every morning, the chef Benoit Nicou goes to the priory's vegetable garden to pick the seasonal produce that he will use to concoct his meals.



↑ Maxime, who is in charge of the service, knows every resident's name, habits and favorite food. Meals set the pace of their day and are a real time for connecting.



95% of the care home's → meals are homemade.

**A real restaurant ambiance**

After hearing such a testimony, we are impatient to actually meet the residents. So we head to the new dining room, located in a 1,600 sq.m. contemporary-style extension created in 2016. The sun is shining through the floor-to-ceiling windows that open out onto incredible views of the Vienne valley. It's 11 a.m., the tables are laid and a hundred or so guests begin to come in, as they do every day, in a very friendly atmosphere. Some are chatting and laughing while others have more pressing matters to attend to like concentrating on the blackboard showing the menu of the day, just like in a real restaurant!



↑ Sourcing from local producers forms part of the chef's commitments to responsible cooking.

Today, it's Maxime who is in charge of the service and he knows everyone's names, habits, favorite foods and dietary constraints. For those residents who have difficulties chewing he serves a chopped or blended version of the menu of the day, plated up like for everyone else. This means that all the guests can share the same flavors and experience.





Elior regularly puts on activities in the care home to brighten up the day. Here, waffles and crepes are being prepared in front of guests in the dining room.



After the main course is finished, Maxime goes round each table with a cheese and dessert trolley. Lunch is nearly over so there's more time for chatting and the chef comes out of the kitchen to greet the guests. They share thoughts and suggestions and even glean information about the evening meal, which will soon start being prepared.

### **There's no age limit for enjoying food**

But before dinner there are some activities planned. A few days ago, the theme was creating window boxes of herbs to be used later by the chef. Today, it's about tucking in straight away, with waffles and crepes prepared directly in the dining room at tea time and the guests giving a hand. Visiting families are served their afternoon tea as if in a proper tea room — just one of the many possibilities offered by Elior on a daily basis.

*“Throughout the day, the dining room fulfils its mission of being a hub of life and a source of vitality,”* concludes Benoit Nicou.

KEY FIGURE

60



The number of Elior kitchens across the USA that make Meals on Wheels. As the main preparer of meals for this home deliveries solution, Elior is a major player in the sector.

DISABILITIES

A TALKING MENU



Menu Buzz is a new digital menu solution that has an audio component to help guests with disabilities.

INNOVATION

DOING MORE FOR SENIORS

In 2017, Elior launched two innovative offerings that contribute to the well-being of seniors in care homes:

**EXHALIA:** an aroma diffuser which helps stimulate appetite

**DYNSEO:** a memory game app for tablets with programs of fun and cultural exercises, along with a simplified messaging app for families.

INDEPENDENCE

THE CHALLENGE OF SERVING GUESTS IN THEIR OWN HOMES

Every player in the catering industry is currently addressing the question of how best to conquer the home deliveries market. Elior Group has come up with the answer.

Who with?

In France, Elior has developed a new concept in partnership with La Poste (the national postal service) to help prevent seniors from becoming isolated.

How?

Elior makes the meals which are then delivered to people's homes by mail carriers. This means that Elior is playing a major role in helping people grow old healthily and at home.

Since when?

This large-scale project has been in test phase since the second half of 2017.

CONCEPT

DAILY BREAK

Daily Break, the new cafeteria concept designed by Serunion, was launched at the San Juan de Alicante university hospital in Spain. The idea behind this concept is to ensure that hospital patients, staff and visitors are given food services and an environment that help them concentrate on their well-being and give them time out from their daily routine.



INTEGRATION

6.5%



The direct employment rate of people with disabilities in France. Elior is committed to giving employment opportunities to disabled people in its central kitchens, with the Jemmapes, Varennes and Varize kitchens leading the way, followed in 2017 by Villeneuve-la-Garenne and ADAPEI 19.









# A QUICK COFFEE?

## WHAT NILS WANTS

To wait for his next connection in relaxing surroundings, away from the crowd, and enjoy a good cup of coffee while replying to his urgent emails.

## WHAT WE'VE PUT TOGETHER FOR NILS



LOS ANGELES AIRPORT  
LOS ANGELES, UNITED STATES



AIRPORTS

**W**e have absolutely no idea what time it is when we meet up with Patrick Cathcart, Areas' site director at Los Angeles International Airport (LAX), who is sitting at a table at the Engine 28 restaurant. To celebrate our arrival in California, we nevertheless let ourselves be tempted by a magnificent American breakfast — pancakes, eggs and a chai latte. At the table next to us, a jetlagged Australian couple opt for a burger with onion rings. *“An airport’s role is to be a magical place for food lovers,”* says Patrick with a smile. *“We’ve to offer travelers whatever they want to eat whenever they want it.”* And so, between 5 o’clock in the morning and midnight, everything is available and the hardest thing is for travelers to choose. Whether they want a cappuccino, a healthy smoothie, a taco, a salad or pork ribs in barbecue sauce, Areas has thought of it all and caters for every budget.

### A taste of the City of Angels

With Santa Monica pier, Hollywood studios, the chic neighborhood of Beverly Hills, and its many amusement parks, Los Angeles is an iconic destination, but some people in transit will be unable to leave the airport. There’s no fear of frustration though because if they can’t get to LA then Areas will bring LA to them! *“We have set up partnerships with the most fashionable addresses in town — Ford’s, Reilly’s, Engine 28, Sammy’s and LAMILL,”* says Patrick, *“with the aim of recreating the LA atmosphere so everyone can say ‘I was there!’”* Downtown, you sometimes have to wait weeks to get a table at the famous B Grill by BOA, but at LAX you can always order something from the restaurant’s menu which is as chic as it is eclectic. While we speak to Patrick, four friends are taking a photo of their meals to share on Instagram.

### A US-style casting

To work at LAX you need to have a sense of showmanship and service. Areas’ 750 employees go all out to ensure that their guests have an excellent experi-



At LAX, Areas can offer any meal at any time.







**Areas' 750 employees go all out to ensure that their guests have an excellent experience.**



perience, however brief it may be. At Dunkin' Donuts, waitresses pass from table to table to offer tastings of new recipes, and a bell rings joyously whenever a tip is given, making everyone laugh. And there's also a happy atmosphere at the famous California Pizza Kitchen, where the pizzaiolo throws pizza dough high into the air to the delight of guests, whetting their appetites.

*"We have created a far-reaching in-house motivation policy so that our 750 employees feel as if they belong to a family and a shared project. This policy has paid off as we have a very low staff turnover and some of our team members have been at LAX for years,"* points out Patrick. A prime example is Raymond Hernandez, who worked there when Areas had just one concession in the whole airport. Today he is General Manager in charge of half of the 24 concepts managed by Areas, with three more on the horizon.



***"The theater and artistry of California Pizza Kitchen makes the concept one of our most enjoyable restaurants here,"* notes Marta Cuatrecasas, General Manager of the North side of the airport for Areas.**



**← At Dunkin' Donuts, a bell rings joyously whenever a tip is given.**



→ Thanks to a far-reaching in-house motivation policy, staff turnover is very low. Some have been with Areas for years.



← Partnerships have been set up with the most fashionable addresses in town. Here, passengers can experience the typical California lifestyle without having to step outside the airport.



### Flavors take off

Patrick accompanies us back to the exit and we pass in front of California Pizza Kitchen in the domestic flight terminal. This Californian institution is one of the airport's best successes. "Are you still hungry?" asks Patrick. If there had been a table free we'd probably have said yes — and put it down to jetlag of course!

**HABITS**

**HEALTHY SNACKING**

One of Areas’ aims in the United States is to offer healthy grab & go solutions. In line with this objective, eight points of sale at LAX airport and another at the Maryland House motorway service plaza propose a wide range of healthy options, including freshly-squeezed juices, organic drinks, superfood cereal bars, dried fruit, grains and gluten-free and GM-free snacks.

**CONCEPT**

**STREET VIEW**



Areas has created the StrEAT food market at Ibiza airport in Spain: four prestigious brands inspired by the street-food trend, serving departing passengers in a space of over 500 sq.m.

**KEY FIGURES**

**AREAS AT COPENHAGEN AIRPORT**



**2**

new Areas points of sale (Retreat and 42Raw) in Denmark’s largest airport.

**29**

million passengers in 2016, making Copenhagen the busiest airport in Scandinavia.

**2**

The number of awards received for the world’s best airport catering offerings (in 2014 and 2016).

**42°C**

The maximum cooking temperature of the dishes served by 42Raw – a new fast-food concept based on salads, sandwiches, fresh juices and acai bowls. Everything is gluten-free and vegan and is prepared using raw fruit and vegetables, served in their natural state.

**1847**

The creation date of the world-famous Danish institution, the Carlsberg brewery, which has teamed up with Areas to open a restaurant and Bar Jacobsen, named after Carlsberg’s founder.

**ABOUT THE CHEF**



**RICARDO PÉREZ**

is the chef at the La Alhondiga restaurant in downtown Bilbao (Spain) and is involved in the new concept developed by Areas at Bilbao airport: Exploring the World from Bilbao.

One word to define his food commitment

Local.

The chef’s signature dishes?

His gourmet offering blends fusion cooking with street food. His recipes for tacos made with beef cooked in red wine and cod with pil pil sauce and his pork shoulder and camembert sandwich in crusty bread already have a cult following!

And what about drinks?

The chef recommends a beer from the San Miguel brewery – a local institution that is a partner of the Exploring the World concept.



## WHAT WE'VE PUT TOGETHER FOR NILS



GARE DU NORD  
PARIS, FRANCE



RAILWAY STATIONS

**I**t's 4.30 a.m. when we arrive at Gare du Nord station in Paris. Everything is quiet in the huge building, which was built in 1867 and is just opening its doors for the day ahead. It's difficult to believe that before it closes, 750,000 people will have passed through in a type of improvised choreography.

### Crowds, from morning to night

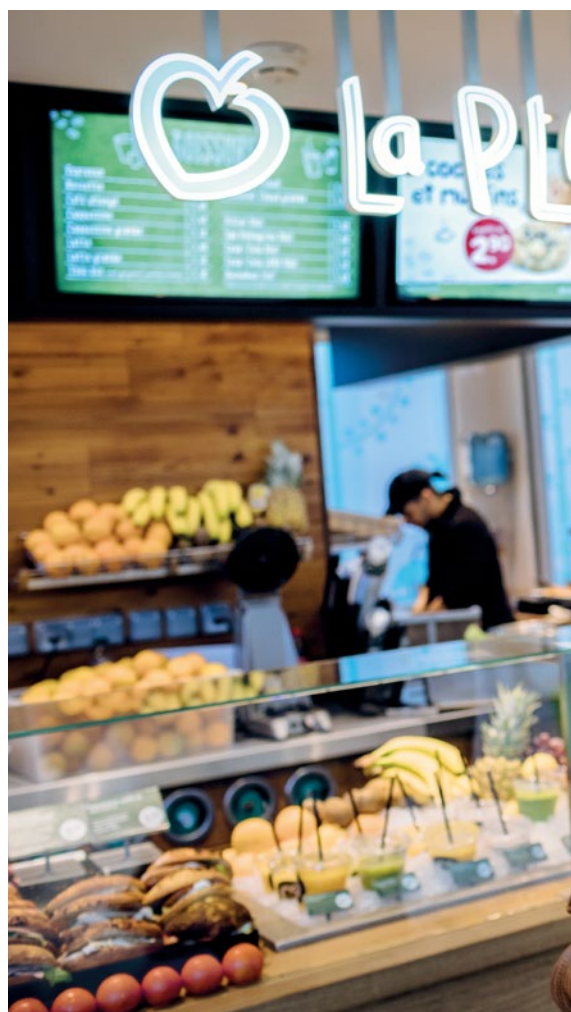
Gare du Nord is Europe's busiest station in terms of passenger numbers. Every day hundreds of thousands of people come here to cross the Channel by Eurostar, travel to the north of France, head for Belgium and Germany with Thalys, do a return journey between Paris and its suburbs, or use one of the five suburban train lines or the subway.

Areas' teams need to get up early to serve these customers on the move. Five o'clock chimes on the station's main clock and we meet up with Romain Osche, Areas' site director, for the first briefing. Our visit starts with the La Place café, whose teams are ready and full of energy to greet the guests who will begin to pour in as soon as the doors open at 5.30 a.m. With its freshly prepared breakfast menu, La Place is a new outlet that attracts early risers!

### Multi-talented and multi-lingual teams

Throughout the morning we follow Romain from outlet to outlet. He knows the station like the back of his hand and navigates effortlessly from one level to another so we'd better not lose him. Knowing how to move quickly and be adaptable are talents that Romain shares with the 220 other people who work for Areas at Gare du Nord. *"Here it's vital to be able to handle orders quickly and in several languages. The pace is intense and we train our teams to help manage stress."*

Time passes differently here because people's break times depend on their own particular schedules and can be taken at any point in the day. Of course there are the last-minute passengers who grab a sandwich before jumping on their train but there are also those who get to the station early or are waiting for someone



and take a longer break out of their often busy day. *"Areas' offerings are particularly varied so we can always give customers what they want when they want it. Whether it be cakes and pastries at PAUL, a healthy salad at Exki, smoothies and sandwiches prepared to order at La Place, a cappuccino at Columbus Café, an original blend at Super Wild Coffee or a dessert at L'Éclair de Génie... the choice is huge,"* explains Romain.

### Behind the scenes

To guarantee the quantities required and constant freshness of the ingredients used, most of the products offered at the station are made on site in a central kitchen open 22 hours a day, seven days a week. Areas' teams have put in place an intricate organizational structure so that all the formulas proposed can be served throughout the day. What goes on behind the scenes is as impressive as a well-rehearsed ballet!





**Most of the products are made on site, guaranteeing freshness and quality as well as sufficient amounts to meet the steady demand throughout the day.**



**Raring to go at dawn, our teams greet their first guests at 5.30 a.m.**

It's 10 p.m. by the time we leave Gare du Nord. Passionate about his job and the place he works at, Romain talks about the upcoming openings of new outlets at the station, including Maison Pradier with its macarons, and a monop'daily convenience store. How about if we come back here soon, even without a train ticket, just to see the sights, hear the sounds and taste the food on offer?

**← 750,000 people pass through Gare du Nord every day.**





↑  
 Areas' offerings are particularly varied — sweet, savory, healthy, gourmet — so customers can always have what they want when they want it, whether it be grab & go or a leisurely meal.



↑  
 Romain Osche, Areas' site director, who is in full discussion here with station manager Jérémie Zegerman, knows the Gare du Nord like the back of his hand. His credo is knowing how to move quickly and be adaptable, just like the 220 people in his team.



→  
 In the Eurostar area passengers have the time to relax, such as here at Exki with its warm and welcoming décor.

## INNOVATION

## CONNECTED EATING

At its L'Agora restaurant in Montpellier-Saint-Roch station in France, Areas has installed digital tables which guests can use to view the menu in different languages, see a detailed description of the dishes (allergen information etc.), rate the quality of the food, look up train times, and even play video games!

Convinced by the potential of this innovative solution – which has resulted in a 20% increase in the restaurant's average customer spend and more efficient service – Areas decided to collaborate with Awadac, a company specialized in digital solutions and connected furniture for restaurants.

This partnership forms part of Elior Group's strategic innovation program called Life<sup>4</sup> (Let's Imagine Future Experiences), through which the Group collaborates with start-ups and lets them test their innovations in its restaurants.



DESDE 2015  
**COMO**  
RESTAURANTE & CAFÉ

## CONCEPT

## ¿COMO ESTAS?

**Concept:** COMO is an Areas own-brand that is focused on healthy, high-quality produce and Mediterranean-inspired cuisine, with food available to eat in or take away.

**History:** After demonstrating its success in the motorways market – at the La Selva and La Jonquera service plazas in Spain – the COMO concept was rolled out to the railway stations market in 2017.

**Success story:** When it opened a new COMO at Sants station in Barcelona – which covers over 1,300 sq.m. – Areas became the leading catering operator at one of Spain's busiest stations in terms of passenger numbers.

## CONCEPT

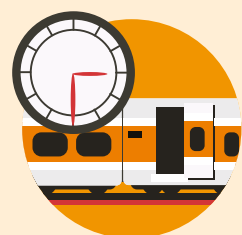
SUPER WILD COFFEE  
PULLS INTO STATION

After opening its doors this year at Versailles-Chantiers station in France, the new Super Wild Coffee concept is already a go-to venue at Gare du Nord, and will soon be at Gare de l'Est and Gare Saint-Lazare stations in Paris, as well as at Fuerteventura airport in the Canary Islands (Spain).

## APP

## MAKE A WISH

Passengers passing through Gare du Nord station in Paris can now use the delivery and loyalty services provided by the Wiiish app designed by Areas and can interact with the food and beverage concepts available at the station before, during and after their visit.







# HAPPY FAMILIES

## WHAT ANA AND JOÃO WANT

To stop off on their journey to their holiday destination and grab a tasty bite to eat with a special menu for children, and then go off and make friends playing in a ball pit.







## WHAT WE'VE PUT TOGETHER FOR ANA AND JOÃO



ALCÁCER DO SAL SERVICE PLAZA  
LISBON, PORTUGAL



MOTORWAYS

**T**he late-morning sun shining on the Via Verde A2 motorway gives it a real holiday feel. Ana Sofia Franco, Marketing Manager for Areas in Portugal, welcomes us with a broad smile at the Alcácer do Sal service plaza, located just south of Lisbon. *“This is the first infrastructure to use the Colibri Via Verde concept, which was developed by the motorway operator Brisa.”*

Colibri is a new and original type of space that groups together several different banners. It offers an à Table ! self-service restaurant with hot and cold food islands, a Delicorner with up-to-the-minute vending machines, a Eureka! shop

selling gifts and regional specialty foods, new Acqua rest rooms and a Kids Zone.

### It's time to eat!

With its offering that changes throughout the day, the à Table ! restaurant is a must for travelers, in Portugal and elsewhere. Ana Sofia leads us directly through to visit the kitchen. *“You might think that because we're at a motorway service plaza we only serve pre-prepared dishes. On the contrary, we are committed to proposing as much ‘homemade’ food as possible.”* As we speak, the kitchen's teams are busy preparing fresh salads, with tomato, pesto and Portuguese sheep's milk cheese. A little earlier, they were making the delicious traditional pastries that Portugal is famous for – pastéis de nata.



Meals are prepared on site as much as possible, from starters to desserts, and drinks. Here, there are traditional pasteis de nata pastries made that very morning by Areas' teams.



The chef puts the finishing touches to his dish of the day: leg of lamb served with asparagus and gratin dauphinois... the wonderful smells are already filling the restaurant!



The chef's dish of the day — which is leg of lamb served with asparagus and gratin dauphinois — has been made from scratch and definitely whets guests' appetites when it is brought into the dining area at lunch time. But some are still hesitating whether to choose the ham of the day, which is cooked and carved by a chef directly in the restaurant in a show-cooking format.





**A five-sense experience**

“We know that a successful meal is not just about taste. It is also essential to stimulate the other senses through attractive presentation, appetizing smells, gourmet textures and other touches,” says Ana Sofia. And this goes beyond the food itself: the entire Colibri concept has been thought out to make guests comfortable and give them a sense of well-being — timber architecture, soft lighting, presentation islands and colorful signage, etc. And it works!

**Taking a break to recharge**

This service plaza has been created to meet the specific needs of a wide range of customer profiles and everyone here seems to be having a great time — the family whose children are running about in the playground, the retired couple browsing through the regional specialties in the shop, the group of youngsters who have stopped to have a sandwich and the business woman sitting at a table with her laptop and a coffee.

And isn't that what motorway stops are all about — breaking the monotony of the journey in order to recharge? At Alcácer do Sal, Areas is proving to travelers that they can enjoy not only their destination but also their journey there.



↑  
The Colibri Via Verde concept is designed to help people feel good and give them a sense of well-being so they can really relax before hitting the road again.



↳  
Everyone seems to be having a great time at this service plaza, whether among family or friends and whatever their age or wants.



**SOLIDARITY**

**HELPING PEOPLE IN NEED**



When hurricanes Harvey and Irma hit the south-east of the United States, Areas' teams did an amazing job at the service plazas along the Florida Turnpike. Thanks to their efforts, the hundreds of thousands of families who took this main artery through the state when they were evacuated from their homes in danger zones were always able to find gas and food on their journeys. Elior North America also moved quickly into action, preparing 1.5 million long-life meals for the inhabitants of Houston and then Florida.

**MANAGEMENT**

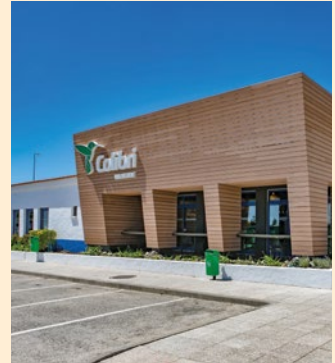
**MEASURING SATISFACTION**



The Net Promoter Score (NPS) system is a tool used by Areas for tracking customer satisfaction in around one hundred restaurants and points of sale in Northern Europe. It measures the difference between the numbers of people who would and would not recommend the brand. 350,000 people responded in 2017. This method is local and action-focused as each site receives and manages a weekly report of its results. This means that local action plans are put in place via a collaborative management system, with teams given considerable autonomy to take initiatives.

**SERVICE PLAZAS**

**SHINY AND NEW**



The year 2017 was marked by refurbishments and new openings at Areas' motorway service plazas in Spain, France and Portugal. The underlying objective: to further improve facilities for travelers and grow revenue through more attractive offerings.

**GROWTH**

**A TASTE OF VACATION**

Areas has strengthened its partnership with Center Parcs by signing a contract for France and Germany that runs until 2031. The leisure segment has now become a strategic development area for Areas.



**TOURISM**

**NEW DESTINATIONS**

Specialized in high-end and events catering, STARR Catering Group (an Elior North America subsidiary) has won a ten-year contract to manage the four restaurants and cafes in the two wings of the National Gallery of Art located in the National Mall in Washington, D.C. (USA).

**KEY FIGURE**

**34**

The total number of motorway service plazas entrusted to Areas by Tank & Rast in Germany, including two new concessions won in 2017.







# CALM AND CLEAN

## WHAT JULIE WANTS

To savor the time after the birth of her first child in a calm and clean environment and to be relaxed enough to rest when baby is asleep.

## WHAT WE'VE PUT TOGETHER FOR JULIE



LA CASAMANCE PRIVATE HOSPITAL  
AUBAGNE, FRANCE



SERVICES

**W**e'd been warned that we would need a lot of energy to keep up with Sylvie Riquelme —

the Elior Services site director — for a whole day. And on arriving at the La Casamance private hospital in Aubagne, we understood why! It was immediately clear that Sylvie had a lot of things to show us. "Where would you like to start?" she asked with a big smile.

### Coordination in the corridors

Sylvie's DECT phone — an essential tool for staying in permanent contact with the 24/7 on-site teams — makes the decision for us by calling her to reception, where patient arrivals are managed. "We use a software that informs us in real time of room availability, and the number of patient arrivals, departures and transfers. This means that our patients never have too long to wait."

Although everything seems calm, in fact the clinic is already in full swing, with surgeries, consultations and examinations all under way. Sylvie goes to meet Adèle who is in charge of centralizing calls and dispatching the clinic's porters. "Thanks to the Fluigo system, we always know where the porters are and if a patient should be getting from one place to another on foot, in a wheelchair or wheeled in their bed. We have an eye on everything!" Adèle gets a call from the OR: a surgery just finished.

Now it's time for the specialized cleaning teams to step in. Elior Services uses the Trapese software to manage, sort and weigh waste, including waste from operating rooms. "At a hospital, waste is an extremely important subject, for environmental, sanitary and economical reasons. There are rigorous processes in place and we take these tasks very seriously."

### More technology for more humanity

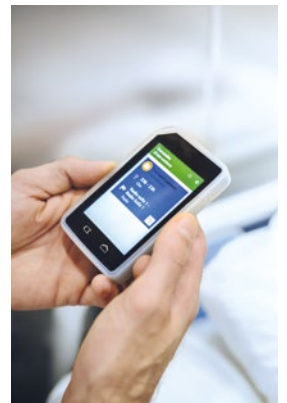
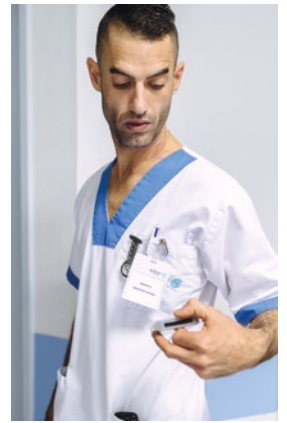
It's midday and the patients' meals are brought to their rooms by teams who changed into the appropriate smart uniforms. Lunch is an important time, with staff meeting and chatting to patients, which often helps brighten up their day.



It's time for us to have a break too and we intend to savor it after our busy morning! So we head to the Sous-Marin dining area to join Elior Services' teams — around 70 people in all. The room is filled with laughter and the good mood of the place is catching. "People often think that technological development comes at the expense of humanity. But here it's the exact opposite. By facilitating working conditions, our technological solutions improve relations not only between team members but also with the medical staff and patients."



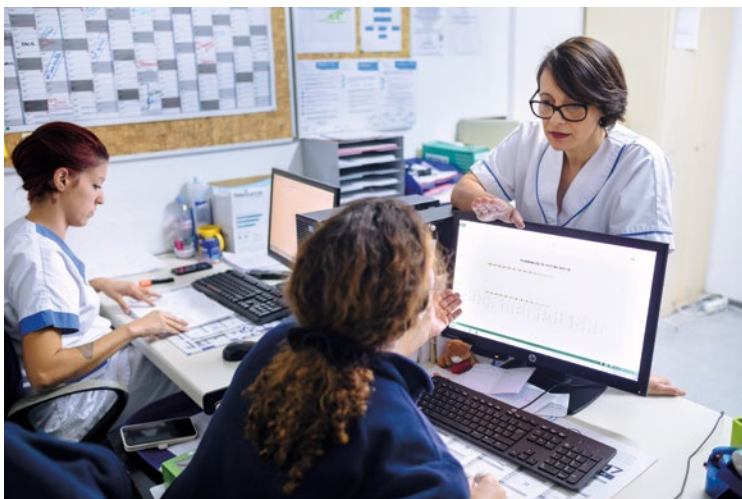




Thanks to Fluigo nomad technology, the transportation of people can be more effectively tracked within the hospital.



← Because logistics are crucial to running a hospital, it uses a software that shows room availability in real time. No sooner is the room freed than it is cleaned and made ready for the next patient!



← Elior Services' site director at La Casamance private hospital, Sylvie Riquelme, sees every day how new technologies have had a beneficial effect on work organization — and on the good humor of her team.

**A responsive cleaning service**

Enough chatting! A number of rooms have just been freed up and having been alerted, the specialized cleaning staff arrive immediately. Thanks to their connected trolley they can track on a tablet all of the protocols for each specific area. Once the cleaning is finished, reception is automatically informed and the room can be allocated to a new patient. As General Manager of the hospital, Caroline Berthet is always open to testing innovations, ensuring Elior Services teams can give their best.

It's now time for us to leave La Casamance. With barely the time to say goodbye, Sylvie sets off again into the hospital's corridors, accompanied by her precious DECT of course!



→ **Meals are an important time for chatting with patients and Elior Services teams take great care to give best quality service.**

← **The specialized cleaning teams use tablets for quality control.**





## TECHNOLOGY

## A GALAXY OF INNOVATIONS

To convince its clients, Elior Services constantly innovates to stay ahead of the pack. It has even created an innovation challenge called Novacio to act as an incubator for projects that will shape the future of hospitality services and logistics in the healthcare sector.

In France, Elior Services' numerous exclusive high-tech offerings have helped it win contracts with prestigious clients such as the two public procurement agencies UniHa and Resah, and Ramsay Générale de Santé.

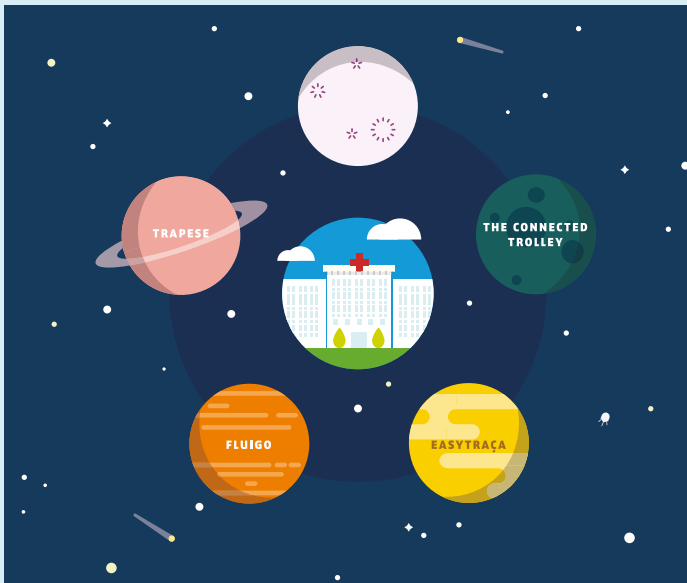
**The connected trolley:** to optimize cleanliness and turnaround times for spaces, starting with hospital rooms.

**Easytraça:** a technology that clients can use to monitor Elior Services' work in real time.

**Fluigo:** a tracking system for optimizing internal requests.

**Trapese:** a digital system for controlling waste management costs.

**As well as** a healthcare-specific platform for in-room services related to Wi-Fi and multimedia...



## REFERENCING

## PUBLIC SERVICE

Elior Services was referenced by the two main public health-care public procurement agencies (UniHa and Resah).



## STANDARDS

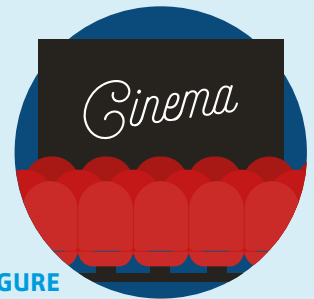
## NEW CERTIFICATIONS

In 2017, Elior Services obtained new certifications further confirming its expertise. They come in addition to the MASE certifications that already guarantee the conditions for operations.

**ISO 14001 SIEGE ESPS:** shows Elior Services' ability to offer services that have a reduced environmental impact.

**ISO 9001:** renewed for cleaning services in the multisegment market, healthcare hospitality services and facility management services.

**QUALIPAYSAGE ESPACES VERTS:** certification for the management of green spaces.



## KEY FIGURE

71

The number of Gaumont-Pathé cinemas whose auditoriums, foyers and rest rooms are now managed by Elior Services. This cinema operator was won over by the quality of Elior Services' offering and customer relations as well as its ability to provide scalable teams that can be adapted to changes in audience numbers.

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Elior Group  
worldwide



As the caterer of choice for 5.5 million guests who are served every day at 25,000 restaurants and points of sale by our 127,000 employees from all walks of life, we play a key part in their break times.

For more than 25 years we have stayed ahead of the curve by anticipating the changing needs and expectations of our guests – children, pupils, students, workers, travelers, hospital patients, care home residents... And we have a full menu for the future, with ever-more information, quality, local offerings, choice, flexibility and sustainability.

In the 16 countries where we operate, food is an essential part of life and culture, which we take into account by blending culinary expertise, operational excellence and constant innovation.

Break times are vital and constantly evolving and our role is to provide the best possible customer experience from morning to night. Digital solutions help achieve this by saving our guests precious time.

Fully aware of the impact our business has on the environment and the economic and social fabric of our communities, we are working hard with all of our stakeholders to leave a positive foodprint from the farm to the fork.

Elior Group. Time savored.

# PURSUE OUR INTERNATIONAL EXPANSION AND CONTINUE THE TRANSFORMATION PROCESS



**Gilles Cojan**

Chairman of the Board of  
Directors of Elior Group

## How would you sum up the Group's performance in fiscal 2016-2017?

FY 2016-2017 was a year that saw an acceleration in the growth momentum begun the previous fiscal year, with revenue climbing 8.9% and topping the €6 billion mark for the first time. International operations accounted for 56% of the total revenue figure and the United States became the Group's second-largest revenue contributor. Overall, our business performance was very satisfactory, even though some divisions did not achieve the ambitious objectives they were set, which meant that we didn't meet our target of significant growth in adjusted EPS. The main reasons for this were the combination of an unfavorable calendar effect for contract catering and a sharp increase in the costs incurred for the Group's IT and digital transformation process.

## How did the Group's ownership structure change during the year?

The Group's long-term shareholding has been consolidated and now represents over 44% of our capital with BIM (23.1%), Emesa (9.9%), Caisse de dépôt et placement du Québec (6.5%) and the entry of Fonds Stratégique de Participations (5.0%).

## Elior Group's governance structure was changed during the summer. Why?

Yes, the Board of Directors decided to separate the roles of Chairman and Chief Executive Officer in order to comply with current best corporate governance practices. The Group's ambitious business development plan means that the Chairman needs to devote a large amount of time to overseeing the Board and its committees, which is not compatible with also being the CEO of a world-leading player. The change will make the Group's corporate governance more effective.

We have now appointed a new Chief Executive Officer – Philippe Guillemot – whose managerial skills, in-depth experience and undisputed leadership qualities put him in excellent stead to pursue the Group's international expansion drive and continue the transformation process we have already begun with the aim of delivering ever-more services and value added for our clients and guests, speeding up the introduction of digital solutions and strengthening the Group's competitive edge.

## How do you perceive Elior Group's future?

We expect to see a further revenue rise in 2017-2018, with organic growth amounting to at least 3% and acquisition-led growth representing over 2%. We anticipate that adjusted EBITDA margin will remain stable based on a constant scope of consolidation and exchange rates and that adjusted earnings per share will increase slightly.

The proportion of revenue contributed by international operations will continue to increase, especially in the United States, where our organic growth is currently the strongest. We will of course pursue our productivity drive and, as has been the case in recent years, we will pass on some of our efficiency gains to our clients. In addition, as a world leader in catering and related services it is our duty to lead the way. Corporate social responsibility now plays a key role in the success of companies and their teams and we are rising to this challenge, notably through the Positive Footprint Plan – our CSR strategy which is aimed at leaving a positive footprint by 2025. I have every confidence that our people will leverage this new strategic tool in order to ensure the Group's sustainable development.



# MAKE ELIOR GROUP THE CATERING INDUSTRY'S BENCHMARK PLAYER



**Philippe Guillemot**  
Chief Executive Officer  
of Elior Group

## What was your assessment of the Group when you first arrived?

I joined a group that has a balanced business portfolio, is well positioned in its markets and has solid fundamentals. The client retention rate for contract catering & services is a very high 93% despite fierce competition and voluntary exits from certain contracts. There were several operational challenges in 2016-2017, especially in the second half of the fiscal year, such as the extremely adverse calendar effect for contract catering and the fact that a considerable portion of the Group's motorways contracts in France came up for renewal. We now need to put strict discipline measures in place for our resource allocation if we want to genuinely transform our group and achieve the growth we are aiming for.

## Which countries are expected to play a key role in the Group's growth?

The Group pursued its external growth strategy in the United States in 2016-2017 via numerous acquisitions, and the USA is now the Group's second-largest revenue contributor, accounting for 19% of the consolidated total — behind France but ahead of other historic markets like Spain and Italy. We plan to put in place the structures, teams and systems we need to maintain our robust organic growth, for instance by concentrating on the main US airports as well as niche markets such as correctional facilities. In the UK, thanks to ongoing business development and a small acquisition in the education market, we are now the country's fourth-largest contract caterer. And lastly, we entered the Indian market during the year by simultaneously acquiring two contract catering companies operating in the business & industry sector, creating a subsidiary that has propelled the Group straight into the ranks of India's top three contract catering players.

## Excluding acquisitions, what are the Group's main capital expenditure projects?

Our Group-wide project to transform our technologies and upgrade our information systems involves a capital expenditure plan representing several tens of millions of euros over the period from 2016 through 2020. This project is essential for our long-term growth and its positive effects have yet to be fully felt. The corresponding operations budgets are gradually increasing and several different areas of our businesses will see the benefits, including customer relations, site management, financial and operational reporting, and IT and personal data security. Data analysis and digital technology will be key factors for improving our growth and efficiency going forward.

## What are your priorities for 2017-2018?

Once I have been out to see our teams in action and meet our clients, by July I intend to announce our long-term goals for growth and financial performance. What will definitely be on the agenda will be transforming our business to make it even more focused, more guest- and client-centric and more operationally efficient, by putting in place long-lasting and carefully targeted projects. I firmly believe that our markets — including the most mature ones — offer many opportunities that can be tapped if we take the right approach to sharpening our competitive edge. I am counting on our ability to combine best-in-class service delivery with our well-proven entrepreneurial mindset to make Elior Group the catering industry's benchmark player, with even stronger credentials than it has today.

# GROUP PROFILE



**5.5 million**

GUESTS  
EACH DAY



**16**

COUNTRIES



**25,000**

RESTAURANTS  
AND POINTS OF SALE



**127,000**

EMPLOYEES



**€6.422bn**

IN REVENUE

*Miam*

**150**

DIRECTLY-OWNED  
AND FRANCHISED BRANDS

## CONTRACT CATERING

**No.4**

worldwide

**23,000**

restaurants and points of sale in



Education



Business & industry



Healthcare

## CONCESSION CATERING

**No.3**

worldwide

**2,000**

restaurants and points of sale in



**90**

airports



**84**

railway stations



**220**

motorway service plazas



**107**

city and leisure sites

## SERVICES

**No.1**

in cleaning services for the healthcare  
market in France



**2,300**

sites



**20,000**

employees in France

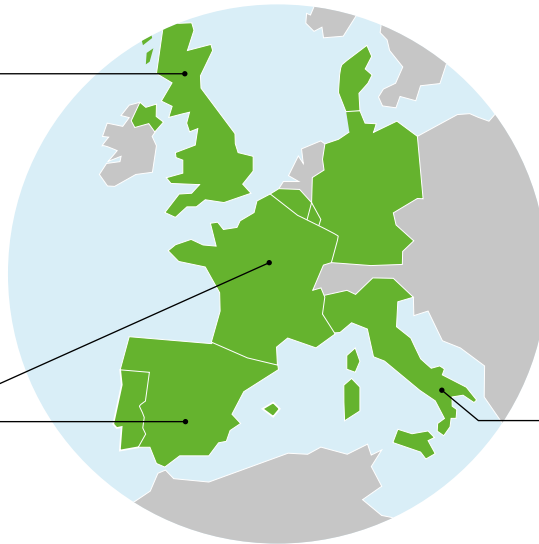


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## IN EUROPE

**No.4**

in contract catering  
in the United Kingdom



**No.3**

in contract catering  
in Europe

**No.1**

in contract catering  
and concession catering  
in France and Spain

**No.1**

in contract catering  
and airport concession  
catering in Italy

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## IN THE AMERICAS

**No.5**

in contract catering  
in the United States

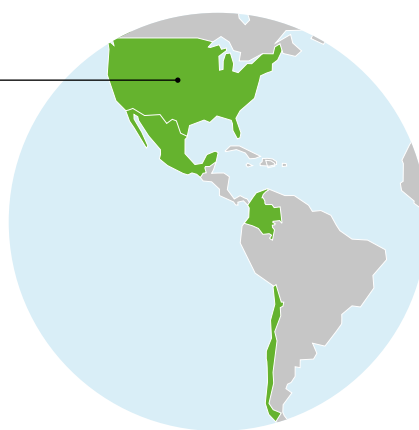
Present at

**10**

major airports  
in the United States

**No.2**

on toll motorways  
in the United States



## IN INDIA



**No.3**

in contract catering  
in India

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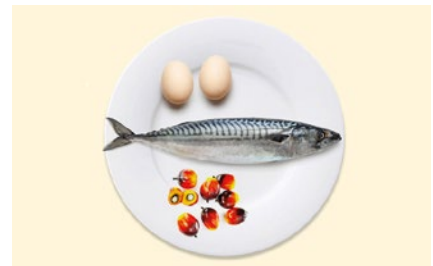
# CORPORATE HIGHLIGHTS OF THE YEAR

In fiscal 2016-2017 the Group continued to reap the benefits of its corporate strategy, with further strong international growth. We are keeping a firm hold on our position as a global leader in our industry by giving ourselves the resources to shape the future of catering while leaving a positive foodprint from the farm to the fork, with the aim of promoting the well-being of everyone.



## A TASTE FOR BETTER

In May 2017, Elior launched a new slogan — “A taste for better” — demonstrating its unwavering commitment to its guests, clients and society as a whole. As the Group’s historic flagship brand, Elior is proving its mettle as a caterer of choice by becoming a real driver of progress. Food quality is a major preoccupation in today’s society and companies that provide food services have an important role to play. Elior treats each of its guests as an individual and seeks to make all meal times an enjoyable experience. Its new slogan is based on four pillars: eating better, living together better, being a better corporate citizen and providing better value for money.



## A POSITIVE FOODPRINT

The Group’s new CSR strategy — the Elior Group Positive Foodprint Plan™ — was unveiled in October 2016 and was followed by a series of announcements and measures throughout the fiscal year. Just a few weeks after the unveiling, the Group made sustainable sourcing commitments for three ingredients: eggs, palm oil and fish. July 2017 saw the launch of Elior Group Solidarities, a non-profit organization for financing, supporting and promoting community initiatives. And in September 2017 the Group took further steps to promote animal welfare by becoming Europe’s first contract caterer to commit to welfare standards for broiler chickens.



## A COLLECTIVE VICTORY

As one of the first companies to believe in Paris' bid for the 2024 Olympic and Paralympic Games, Elior Group became one of its official partners and mobilized all of its resources to support the bid. The Group was entrusted with the “sport, nutrition and well-being” aspect and launched a campaign called #2024secondes, encouraging the French to take at least 2,024 seconds each day (about 34 minutes) to have a “well-being break” by practicing the sport of their choice and enjoying a healthy meal. The campaign was extremely popular and we are proud to have played our part in Paris' victory!



## INCREASINGLY GLOBAL GROWTH

The Group pursued its international expansion throughout the year, making five new acquisitions in the United States and winning its first contracts in Luxembourg. The concession catering business also extended its geographic footprint, opening points of sale in Colombian and Danish airports for the first time. Meanwhile, our more longstanding host countries did not rest on their laurels, as illustrated by the growth seen in the German motorways market. We also made our entry into the Asian market in November 2016, by simultaneously acquiring two India-based contract caterers.



## THE CATERING MODEL OF THE FUTURE

Innovation is one of the Group's key growth drivers that is already delivering results and we are supporting an ecosystem that encourages it in all its forms. The Life<sup>4</sup> (Let's Imagine Future Experiences) program guides our teams in both internal and external innovation processes, with projects ranging from connected restaurant furniture to ultra-personalized meals and predictive analysis solutions. In parallel, we created a new space for collaborative creation in our Parisian head office — the LAB — which is a laboratory for ideas and experiments to craft cutting-edge solutions.



## COUNTRY FOCUS



## INDIA — A FAST-GROWING AND HIGHLY-FRAGMENTED MARKET

As the second-largest market in Asia after China, India represents over \$3 billion in potential contract catering revenue, with 1.3 billion inhabitants in four regions and 29 provinces.



### No.3

in contract catering



### 165,000

guests a day



### 3,800

employees



### 5

main types of cooking



### 70 to 80%

of guests are vegetarian

**Our objective in India is to be the caterer of choice in the business & industry market, with a premium positioning, and to expand our coverage to the healthcare and education markets.**



### MEGABITE FOOD SERVICES

Megabite  
— elior

**Based in:** Bangalore

**Founded in:** 2005

**Profile:** a contract catering specialist for major corporations in Bangalore and Mumbai (South and West India) with a premium positioning

**Team:** 1,000 employees

**Some client references:** Accenture, Cisco, Facebook, Google, LinkedIn, McKinsey & Company, Microsoft, Shell, Walmart

### CRCL

CRCL  
— elior

**Based in:** Chennai

**Founded in:** 1983

**Profile:** one of the largest and most well-known players in South India; an expert in large-scale catering for the manufacturing sector and is also present in the healthcare and education markets.

**Team:** 2,800 employees

**3 central kitchens**

**Some client references:** Caterpillar, Daimler, LGT Shipbuilding, Madras Rubber Factory, Pfizer, Vellore Institute of Technology, Yamaha

# BUSINESS HIGHLIGHTS OF THE YEAR



## AIRPORTS TAKE OFF WORLDWIDE

Global air passenger traffic is still increasing and the Group is ideally positioned to reap the benefits of this upward trend. In 2016-2017, Areas won its tenth US airport – Minneapolis-Saint Paul – as well as extending its presence at LAX in the USA, signing new contracts in Mexico and making a successful entry at Bogota airport in Colombia. In Europe, we won ground at Paris-Charles-de-Gaulle airport (France) and Rome-Fiumicino (Italy), gained a foothold at Copenhagen airport (Denmark) and Berlin (Germany) and inaugurated new outlets at Faro (Portugal) and Ibiza (Spain).



## NEW MARKETS, NEW APPROACHES

The Group took several steps in expanding its contract catering business during the year. In France, we continued to craft premium offerings that combine non-stop services and regional products and which have won over clients such as Airbus Helicopters and the Les Echos-Le Parisien group. For Gustave Roussy – Europe's leading cancer center – we teamed up with a Michelin-starred chef to create a new offering aimed at helping patients get their appetite back and therefore have an easier stay in hospital. In Spain and Italy, we won major multi-site contracts in the defense sector thanks to our central kitchens. And in the United States, the government-run schools in Waukegan (Illinois) selected us for the new approach we proposed to cater for 12,000 pupils from pre-school to high school.



## CLEANER VENUES FOR PERFECT LEISURE

Although healthcare hospitality is still the core business of Elior Services – which is number one in this sector in France – the company is experiencing significant growth in cleaning services and facility management at leisure venues thanks to several key contracts. As a long-standing partner of the Stade de France stadium in Paris, its proven expertise helped it win a contract with the U Arena, the new modular and multi-use site located near the Group's head office. Also, having already worked with one Gaumont-Pathé cinema, Elior Services won a bid for the company's entire network of 71 sites in France, thanks to the quality of its offering and customer relations.

# STRATEGY AND ORGANIZATION

The Group has a clear strategy focused on its core business of catering, which has two components – contract catering and concession catering. It also has a services business (cleaning and facility management), primarily operated in France.

Our strategy is underpinned by three key principles:

- Remaining focused on a select number of countries;
- Achieving leadership positions;
- Balancing the geographic and/or market segment mix.

Our ambition is to be the caterer of choice driven by quality and innovative customer experience. We have a differentiation strategy underpinned by a leading-edge marketing and digital approach that is resolutely customer-focused. In tandem, we are pursuing an external growth strategy aimed at achieving leadership positions in our host countries, especially in contract catering in the United States and the United Kingdom.





# GOVERNANCE

AT JANUARY 31, 2018

Elior Group's single-tier governance structure was changed during 2016-2017 as the roles of the Chairman of the Board of Directors and Chief Executive Officer were separated, in line with best corporate governance practices.

## BOARD OF DIRECTORS

### Roles and responsibilities

The Board of Directors examines and approves all major decisions concerning the business, human resources and financial strategies of the Group and oversees their implementation by management. Its operating procedures are described in the Registration Document.

#### Gilles Cojan

Chairman

#### Gilles Auffret

Senior independent director

#### Laurence Batlle

Independent director

#### Anne Busquet

Independent director

#### Célia Cornu

Director (representative of Sofibim\*)

### Membership structure

Elior Group's Board of Directors comprises nine members who are elected for four-year terms. Five of the directors are independent and five are women.

#### Emilio Cuatrecasas

Independent director (representative of Emesa)

#### Sophie Javary

Director (representative of Servinvest\*)

#### Elisabeth Van Damme

Independent director (representative of CDPQ)

#### Robert Zolade

Honorary Chairman, director (representative of BIM\*)

\* Entities directly or indirectly controlled by Robert Zolade

## EXECUTIVE MANAGEMENT

The Chief Executive Officer's work is based on objectives set within the framework of the strategic roadmap as well as on goals established by the Board of Directors. He actively participates in meetings of the Board of Directors and reports regularly to the Board on the Company's operational management and on significant events in the life of the Group, and as such is involved in road mapping and adjusting the Group's overall strategy.

#### Philippe Guillemot

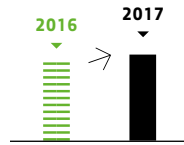
Group Chief Executive Officer

#### Pedro Fontana

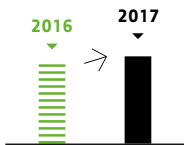
Group Deputy Chief Executive Officer and CEO of Concession Catering Worldwide

# FINANCIAL PERFORMANCE IN 2016-2017

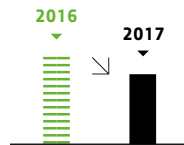
Elior Group pursued its expansion drive, with total revenue growth for the year coming to 8.9%, confirming the quality of our offerings and the strong momentum in our markets. Adjusted EBITDA rose 5.9%.



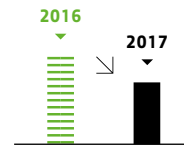
**€6.422 billion**  
CONSOLIDATED REVENUE  
(UP 8,9% YEAR ON YEAR)



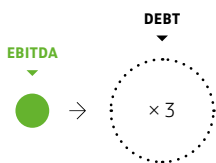
**€531 million**  
EBITDA  
(UP 5.9% YEAR ON YEAR)



**€114 million**  
ATTRIBUTABLE PROFIT  
FOR THE PERIOD  
(DOWN 15.6% YEAR ON YEAR)



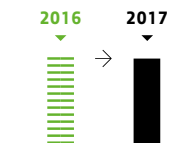
**€122 million**  
FREE CASH FLOW  
(DOWN 29.7% YEAR ON YEAR)



**3 x EBITDA**  
LEVERAGE RATIO



**€1.02**  
AJUSTED EARNINGS PER SHARE



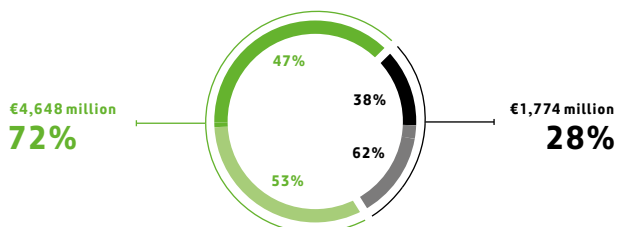
**€0.42**  
DIVIDEND\*

## REVENUE BY BUSINESS LINE AND GEOGRAPHIC REGION

### 2016-2017

Contract catering & Services

Concession catering



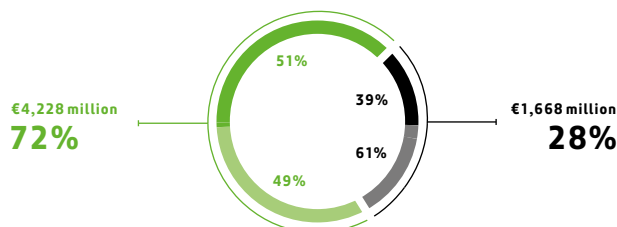
- 47% France
- 53% International

- 38% France
- 62% International

### 2015-2016

Contract catering & Services

Concession catering



- 51% France
- 49% International

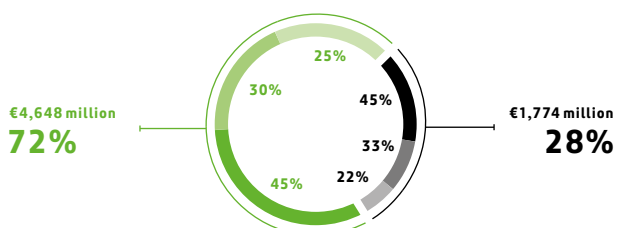
- 39% France
- 61% International

## REVENUE BY BUSINESS LINE AND MARKET

### 2016-2017

Contract catering & Services

Concession catering



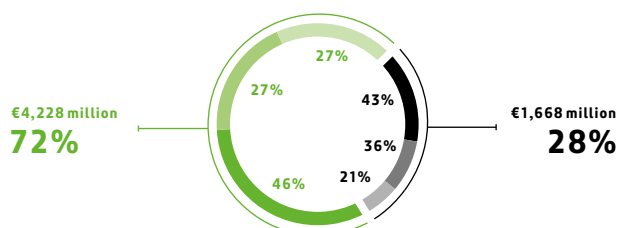
- 25% Healthcare
- 30% Education
- 45% Business & Industry

- 45% Airports
- 33% Motorways
- 22% City sites & Leisure

### 2015-2016

Contract catering & Services

Concession catering



- 27% Healthcare
- 27% Education
- 46% Business & Industry

- 43% Airports
- 36% Motorways
- 21% City sites & Leisure

## EBITDA BY BUSINESS LINE AND GEOGRAPHIC REGION

### 2016-2017

Contract catering & Services

Concession catering

€342 million

€193 million

Corporate  
€(4) million

- €162 million International
- €180 million France

- €123 million International
- €70 million France

- €(4) million Corporate

### 2015-2016

Contract catering & Services

Concession catering

€325 million

€183 million

Corporate  
€(8) million

- €139 million International
- €186 million France

- €108 million International
- €76 million France

- €(8) million Corporate



# CSR STRATEGY AND OBJECTIVES



THE ELIOR GROUP  
**POSITIVE  
FOOTPRINT  
PLAN™**

In 2017 we began to roll out our new CSR strategy, the Elior Group Positive Foodprint Plan. The plan's aims were published, specific commitments were set out and measures concerning sustainable sourcing of ingredients were launched. This strategy – which has been well-received by all of the Group's stakeholders – entails our employees, clients, guests and suppliers working closely together to achieve ambitious goals.

## COMBATING FOOD WASTE

In October 2017, Elior Group drew up a zero-waste charter which sets the target of sending zero food waste to landfill by 2025. We act to combat food waste at each stage of the service chain: at source by taking care to use high quality products and recipes; on a daily basis by efficiently managing quantities and training employees to “think green”; and at the end of the chain by redistributing unsold food, recycling waste and encouraging guests to adopt eco-friendly behaviors.

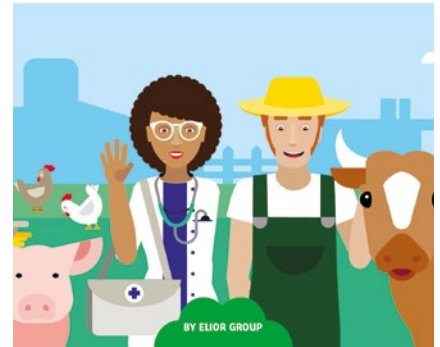


## HELPING CANCER PATIENTS

During the year, Arpège reaffirmed the Group's commitment to the Cancer@Work non-profit organization by signing up to the Cancer@Work Charter and taking part in its Pionniers (Pioneers) program. This organization's objective is to help cancer sufferers to be able to keep their jobs and return to work and also to improve the quality of their working lives. Having been a member of Cancer@Work since 2012, the Group's ongoing aim is to change attitudes towards cancer sufferers and the way they are treated, at all levels of the business.

## OBTAINING ORGANIC CERTIFICATIONS

In Spain, the central kitchens in Malaga, Seville and Almeria – which make over 5.3 million meals a day for the education and healthcare markets – have been awarded 100%-organic certification by the CAAE. In France, Elior had its Level 1 Ecocert certification renewed for its central kitchens in Rosny and Fresnes and for three care homes for the elderly. Obtaining this certification requires offering a varied choice throughout the year as well as providing organic food, using short supply chains and favoring local produce.



## PROMOTING ANIMAL WELFARE

As part of its overall aim to be a good corporate citizen and in line with the UN Sustainable Development Goal (SDG) 2, the Group has put its commitments into practice by requiring its suppliers to comply with ethical practice standards for animal breeding. Because we believe that animal welfare is essential for good animal health and that it forms a vital link in a sustainable supply chain, animal welfare is a priority in our CSR strategy.



Elior Group has been a member of the United Nations Global Compact since 2004, reaching the GC Advanced Level in 2015.



## HEALTHY CHOICES

**125,979**

product analyses

**476**

nutrition specialists

### ALL OF OUR GUESTS WILL BE ABLE TO CHOOSE HEALTHY AND DELICIOUS FOOD BY 2025

The Rueil-Malmaison central kitchen (France) prepares more than 7,000 meals every day for nurseries, schools and care homes. Thanks to the state-of-the-art equipment at this kitchen, it can offer a special menu that excludes 9 of the 14 main allergens as well as meals that meet the requirements of 14 different types of specific diet.

Also in 2017, Elior UK launched Elements — a new health and well-being concept to give customers the “elements for a super life.” The concept puts a strong focus on fresh, natural food and offers tasty, healthy recipes that are low in calories and fat and have no additives.



## SUSTAINABLE INGREDIENTS

**36%**

of eggs come from free-range hens

**3,448**

organic product references

**95%**

of suppliers have signed the Elior Responsible Purchasing Charter in France

### TEN OF OUR MAJOR INGREDIENTS WILL MEET OUR SUSTAINABLE AND LOCAL SOURCING CRITERIA BY 2025

ISO 50001 certification has been awarded to all of Elior's entities in Italy for setting up an energy management system designed to improve energy performance. All of Areas' points of sale at Rome Fiumicino airport are also ISO 50001-certified.

Since 2012, Elior has reduced its levels of pollutant plastics waste from food containers by more than 750 tonnes. Five million fully-compostable, and therefore safer, food containers were used in 2016-2017.



## A CIRCULAR MODEL

**76%**

of Elior's vehicles are eco-efficient

**82%**

of used food oils are recycled or re-used

### ZERO WASTE TO LANDFILL BY 2025

Elior has joined forces with Mr.Goodfish to promote responsible fishing in its French restaurants by signing a partnership agreement aimed at enhancing its offering of fish sourced from sustainable fisheries.

Another of our eco-moves is our recent backing of Greater Paris's first mixed organic/traditional vegetable processing facility, which will be able to supply fully-local produce to 700 school restaurants managed by Elior that cater for over 200,000 children. This project is in line with Elior's overall aim of achieving a balanced ecosystem from farm to fork.



## THRIVING PEOPLE AND COMMUNITIES

**62%**

of our training programs relate to food safety and trade-specific techniques

**47%**

of our managers have reached their positions through internal recruitment

### BY 2025, 70% OF THE GROUP'S MANAGERS WILL COME FROM INTERNAL PROMOTIONS

For its cleaning operations in the tertiary sector, Elior Services has developed an offering called Coabiz, which is based on the principle of cleaning staff doing their jobs during, rather than before or after, office hours. This helps these employees achieve a better work-life balance as well as professional recognition.

In Northern Europe, Areas has strengthened its induction and training programs for the future managers of its points of sale. These programs entail (i) an external work-study program set up with Schola Nova for 20 young people each year, and (ii) four in-house experience-based programs designed with ESCP Europe, which enable trainees to access managerial-level positions.

# ELIOR GROUP WORLDWIDE

## CHILE

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areas.com

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### Gemeaz-Elior

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T: +39 02 390391  
gemeaz.it

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hospesitaly.it

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T: +52 5551332100  
latam.areas.com

## PORTUGAL

### Areas

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### Serunion

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# ELIOR GROUP ON SOCIAL MEDIA



## TWITTER

Corporate and BtoB news, press releases, events... keep up with everything that's going on in the Group via our Twitter accounts.



## LINKEDIN

All the latest corporate, business and recruitment news.



## INSTAGRAM

All of our savoir-faire... in pictures!



## FACEBOOK

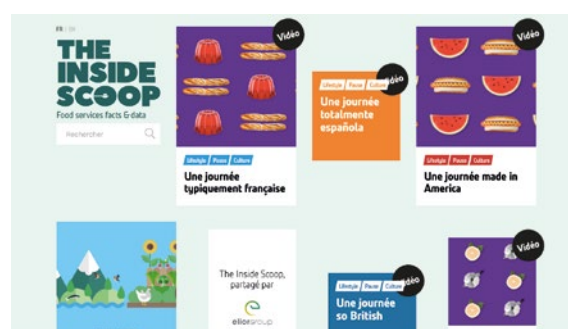
Go behind the scenes.

<b>Group</b>	@Areas @Elior_Group	Elior Group	@elior_group	
<b>France</b>	@Areas_FR @Elior_France @EliorServicesFR	Areas France Arpège Cook And Style Elior France Elior Services	@arpege_cookandstyle	@areascarrieres @elior.carrieres
<b>Italy</b>	@Areas_IT	Areas Italia Elior Italia		
<b>Spain</b>	@Areas_ES @Serunion @singularis_tw	Areas España Serunion S.A.	@areas.es @singulariscatering	@serunion
<b>United Kingdom</b>	@elioruk @LexyFood	Elior UK Lexington Catering	@elior_uk @lexyfood	@elioruk
<b>United States</b>	@AreasUSA @STARRevents	Areas, United States Elior North America STARR Events	@starrevents	@curahospitality @Events.STARR

## The Inside Scoop – food services facts and data

With The Inside Scoop, we aim to share and spread key food services facts and data, in various gummy formats. The themes we selected (food, innovation, lifestyle, foodprint) allow us to reveal the trends and recipes of a fast-changing business. Most of this information comes from Elior Group's activities.

[theinsidescoop.eliorgroup.com](http://theinsidescoop.eliorgroup.com)



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Communication & CSR Director

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Aymeric Thon-Adjalín (page 20)

Eléonore Gusta

and Edgar Gusta Cordier (page 30)

Andréa Durand (page 36)





# A UNIQUE BRAND CAPITAL

## OUR COMPANY BRANDS



### FRANCE



### INDIA



### ITALY



### SPAIN



### UNITED KINGDOM

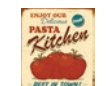


### UNITED STATES



## CONTRACT CATERING

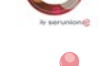
### BUSINESS & INDUSTRY



### HEALTHCARE



### EDUCATION



## FRANCHISED BRANDS



## CONCESSION CATERING

### DIRECTLY-OWNED BRANDS



### FRANCHISED BRANDS



### RETAIL



### PRESTIGIOUS RESTAURANTS



