

Back To Campus...Finally Colleges & Universities





Agenda

- What's Happening At Colleges & Universities
- What They Want: Prioritizing Their Needs
- The Blend
- How You Can Take Advantage



Segment Overview



C&U Is...

High Volume



On-Site,
Off-Premise,
Catering, Retail

Specialized
Menus



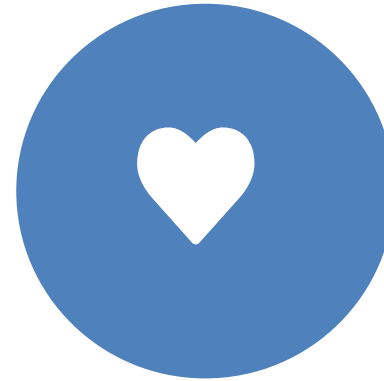
Global, Regional,
Meet Every
Student's Needs

Sustainability



Social
Responsibility

Nutrition



Stealth Health,
Popular Diets,
Allergens
Immunity

Interactive vs.
Transactional



Customers as
"Guests",
Customers as
Critics, Customers
as Partners

Segment Overview



\$9.2

Billion in
purchases

\$18.6

Billion in
Retail sales
equivalent

4,551

Potential contact
points

4.0%

Nominal growth
2019RP

3.6%

Nominal growth
2020F

1.7%

Real growth
2019P

1.6%

Real growth
2020F

UConn Dining Services

University profile

9 DINING UNITS

- South Campus Marketplace
- Northwest Marketplace
- North Campus Dining Hall
- Gelfenbien Commons & Halal
- Putnam Dining Hall
- McMahon Dining Hall
- Buckley Dining Hall
- Whitney Dining Hall
- Kosher Kitchen in Gelfenbien Commons

11 RETAIL LOCATIONS

- Union Street Market
- Freshens
- Chuck & Augie's...A Gathering Place
- Cafe Coop
- UC Cafes – Bookworms
- UC Cafes – Up & Atom
- UC Cafes – Wilbur's
- UC Cafes – Chem Cafe
- UC Cafes – Lu's
- Mort's – Avery Point
- Dairy Bar

KEY FACTS

- 5th Largest in U.S.
- **185,000 Meals/weekly**
- 15,000 Residents
- 11,000 on meal plan
- Top 5 program in \$ volume
- \$68 Million in sales
- \$9 Million renovation (2013) McMahon Hall
- **Catering – 4,800 events annually, dedicated kitchen**
- Central baking, 7 days a week
- New Gluten-free Bakery

Other Examples/Partners

MICHIGAN STATE UNIVERSITY

- \$32 million in Annual Purchases
- **\$150 million in Annual Revenue**
- Student enrollment – 50,000
- Students on Meal Plans – 14,000



UMASS-AMHERST

- \$31 million in Annual Purchases
- **\$99 million in Annual Revenue**
- Student Enrollment – 30,000+
- Students on Meal Plans – 18,000



UNIVERSITY of NOTRE DAME

- \$21 million in Annual Purchases
- **\$66.5 million in Annual Revenue**
- Student enrollment – 12,600
- Students on Meal Plan – 8,100

TOP 500 CHAINS – Where C&Us Rank

Rank	Chain	Annual \$ Sales
218	Rooster's	\$152 million
Michigan State University		\$150 million
219	Hurricane Grill & Wings	\$150 million
238	Lee's Famous Recipe Chicken	\$134 million
Penn State University		\$132 million
242	Baja Fresh Mexican Grill	\$130 million
298	The Palm Restaurant	\$102 million
University of Massachusetts		\$99 million
304		\$99 million

What Colleges & Universities Want



2020 Disruption



From gap semesters to a gap year: college students during the pandemic

COLLEGE VOICES

College interrupted: Many students chose to take time off instead of remote learning during the coronavirus pandemic

PUBLISHED WED, JUN 9 2021-12:04 PM EDT

U.S. | EDUCATION

THE WALL STREET JOURNAL.

Colleges Send Students Home as Outbreaks Worsen.



2020 Disruption

- Getting Back to Normal
- A New Normal—Approachability
- International Students
- Focus on Operations
- Labor Issues
- Extended Dining—more locations, later hours
- Delivery and Robotics
- Safety
- Food Quality
- 2nd Semester Comeback



Key Issues



- Supply Chain
- Controlling Costs
- Less Waste
- Labor, Labor, Labor
- New Food Trends
- Getting Back To Normal
- What's Next

On The Way Back

DINING @HARVARD

Harvard University Dining Services (HUDS) looks forward to welcoming you home to Harvard in the fall! We have been working closely with partners at Harvard College to prepare for your arrival. We are excited to provide a hospitality and dining program that **is delicious and reflects the rich diversity in cultures and experiences** that encompass our community. For many of you, this will be your first chance to dine with us; for others, it will be a reunion and we can't wait. **The changes in dining experiences throughout the past year showed us how we could adapt and change to the needs of the moment.** With that in mind, the coming year will feature modifications to the program that work to address student feedback and usage data to best allocate resources. We look to the next year as the first of a **three-year evolution and process of piloting adjustments, gathering feedback, and shaping a healthy, sustainable & inclusive residential dining program.**

As you arrive on campus, here's what you can expect.

“Extended Hours”

“Stronger vegetable and plant-based choices, alongside lean meat proteins and whole grains”

“Re-imagining the grill at lunchtime as a locally-sourced, biodiverse, beautiful, and customizable vegetable preparation destination”

“Wow you with popular Bistro Bowls, make-your-own stations, globally-inspired dishes, and more.”

“FlyByes”

TOP 10 TRENDS



- Sustainability--Locally Sourced Foods, "Grow Your Own", Zero Waste Initiatives
- Cleaner Labels *and* transparency in our foods
- Smaller Red Meat Footprint
- Authentic Global menu items (SE Asia, India, Korean, African, American Heritage, Regional Spice)
- Plant-based *or* Plant forward menu items
- Bowls - anything in a bowl
- *LTOs - Limited Time Offers: change menus more often*
- Personalization replacing Customization
- Food with a Story/Food Literacy
- Food Insecurity

WHAT'S IMPORTANT TO DINING DIRECTORS

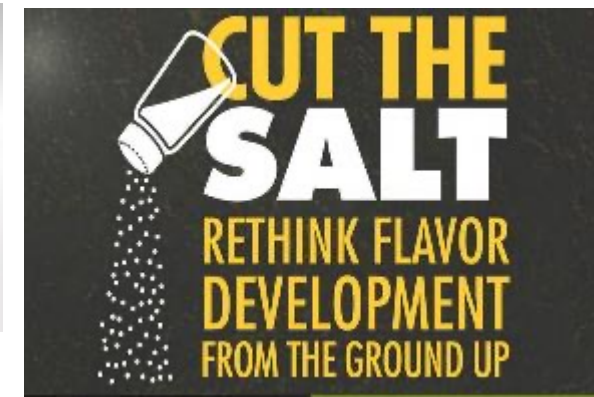
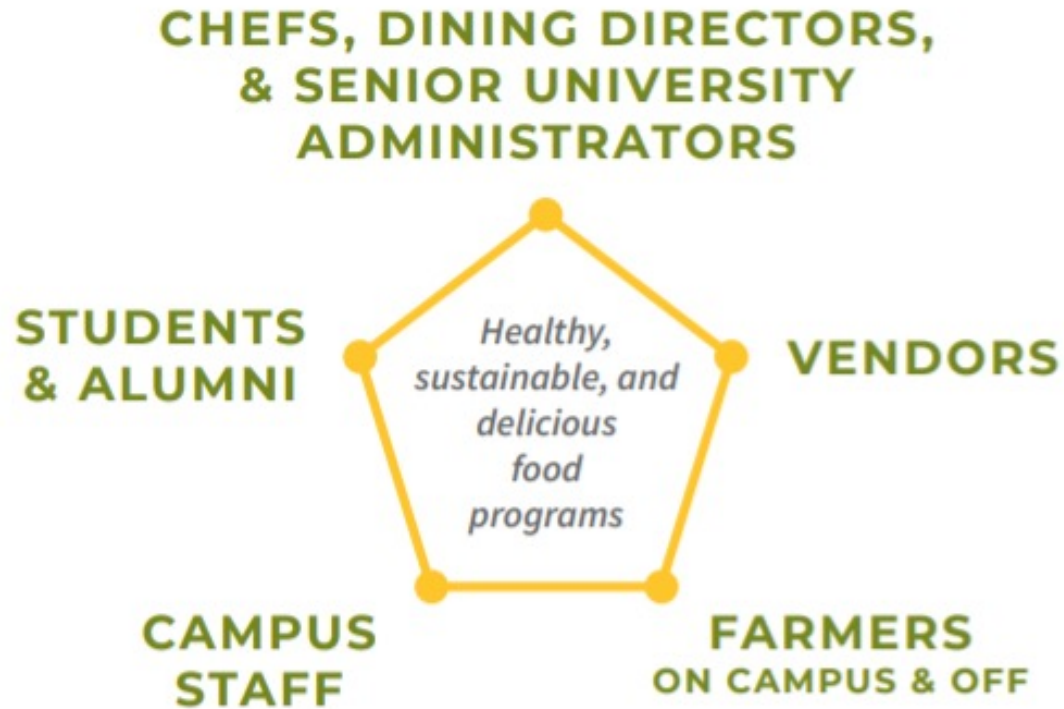
Which of the following Menu Trends are you following to innovate your menu?*

- GLOBAL FLAVORS 88%
- PLANT BASED 72%
- AUTHENTICITY 68%
- PORTABILITY 52%
- IMMUNITY BOOSTING 32%

• Reset. Rethink. Reimagine.



Key Influencers



Influences on Students/Brands They Love



Local Foods & In-House Brands



Penn State University



Redifer Commons
Concepts
State College, PA



Principles in Action

"Michigan Dining leads, feeds and contributes to the education, health and experience of our community, environment and staff."



Banh Mi with Shiitake-Chicken Meatballs

"Plant-forward cuisine needs to be exciting and enticing in order to compete with other animal-based protein dishes on the line. Getting our chefs inspired by global cuisine expands the boundaries, flavors, colors and techniques that we can use for our menus, and draws our customer in to try new and unexpected dishes."

Elijah Golden
University of Colorado - Boulder



Chioggia Beet "Poke" Bowl
Chioggia beets, peeled sweet potato or yam, shiitake mushrooms, edamame, avocadoes, scallions, hijiki seaweed, radish, baby spinach, quinoa, & Sambal Olek chili paste
Stanford University



North Texas Mean Green's Mushroom Curry



Stanford Farms Power Bowl



UC Santa Barbara Mushroom-Lentil Burger



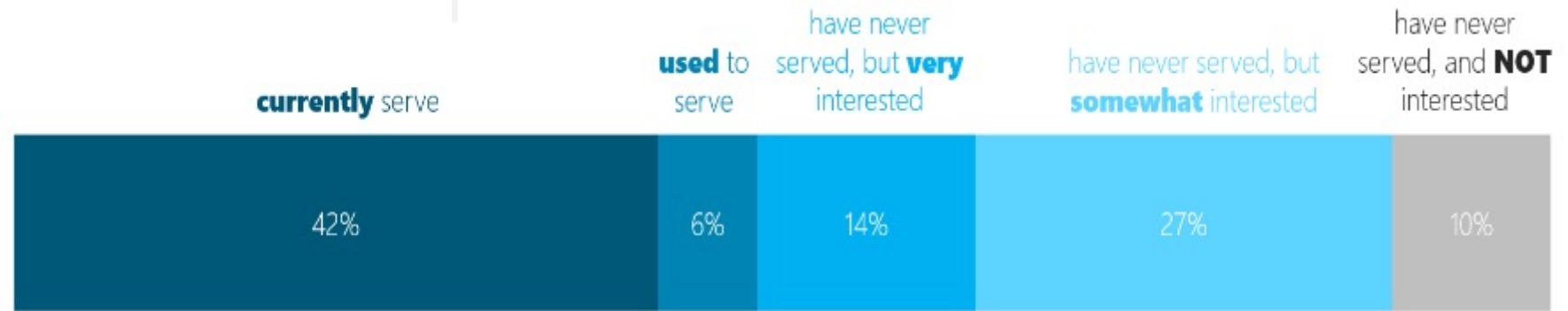
UCLA Carbon Labeling

The Blend On Campus



***83% of all colleges
and universities in
the U.S. (nearly
4,500) menu or
want to menu The
Blend[®]***



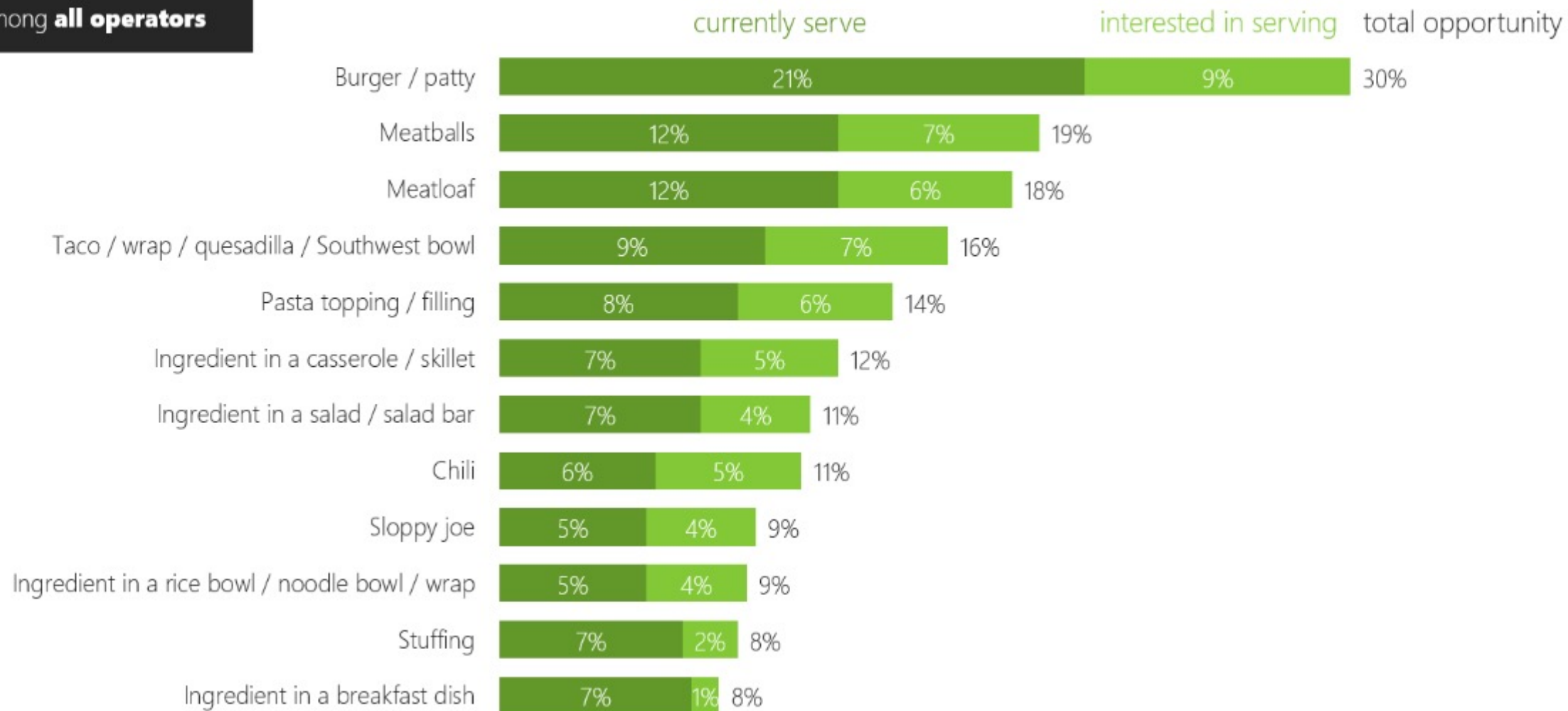


Penetration is high among the MCURC—**89%** of members surveyed currently serve blended protein. **75%** said the top reason was sustainability



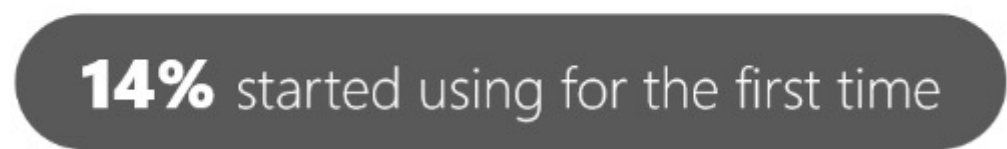
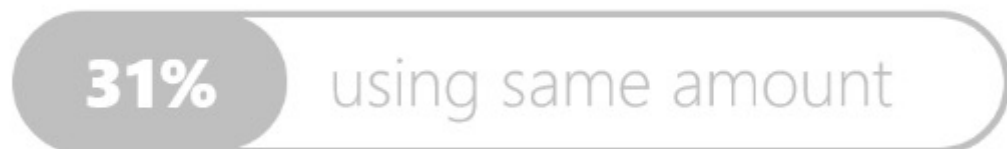
INTEREST & USAGE BY MENU APPLICATION

rebased among **all operators**



among C&U operators who serve blended protein

CHANGE OVER PAST TWO YEARS



CHANGE OVER NEXT TWO YEARS



C&U operators do not plan to decrease the amount of blended protein served over the next two years

Strong Use of Mushrooms



“ We do have a Blended Burger in Retail, but the most fun we have is when we serve a pasta and meat sauce. We have one chef do a traditional meat sauce, another chef do a meat and mushroom, and one does meat-mushrooms-lentils. Every time, they pick the meat-mushroom.”

--University of Arkansas (Medical)

“ We love to stuff portabellas. You can stuff them with anything—making them meat-based or plant-based. Last we did was a Philly-stuffed Port. We even have stuffed them with Beyond Sausage for our vegetarians. We also have the best mycoprotein products from Mollys—I would put their chicken up against anyone.

--University of Dayton

“ We used Blended Burgers throughout campus, but they are now too expensive from our supplier. We switched to Portabella Sandwiches and have had great results. Now that we are back, we are going to do everything we can to bring Blended Burgers back. We also have a new plant-based station, and mushrooms are unbelievably versatile.”

--UCSC

“We were rolling out the Blended Burger and then the pandemic hit, so that was stopped. But mushrooms are like a Swiss Army knife to us. We use them for so many things in so many ways. In fact, for our Welcome Back event, held outside, we are cooking Mushroom Cheesesteak sandwiches with Fontina. I know they will be the bomb.”

--Sodexo at Rensselaer University

“We do so much locally, that we have our own drivers able to pick many items up. That’s one of the reasons we now have a local meat supplier making our Blended Burger which will be campus-wide. Food as medicine will be a big issue for us. And carbon neutrality is critical to our program as we move forward with students back on campus.”

--University of Michigan

“We love the Blend. We are even blending with one of the alternative meat products, and it is keeping costs of that product down. But mushrooms in general are a major player in our dining programs. Natural and plant-based are key for us as we welcome students back, and mushrooms play a significant role.”

--Michigan State University

“Our new mantra is ‘Less is Better’. Things that we were doing two years ago seem ridiculous. Flexitarians now are the biggest segment of our dining, although Vegans are the most vocal. That’s why we are starting most of our dishes with plants—then you can add meat, or tofu or more plants. We do a Latin Tuesday and the most popular taco is the Mushroom taco followed by the blended Lentil-Walnut-Mushroom version.”

--University of Washington

Taking Advantage



THE RISE
OF ASIAN
FOOD



482%
INCREASE
— SINCE 1999 —

- washingtonpost.com



**FEED YOUR
immune
system**



Mushrooms can be
Considered
one of the most
Sustainably
Produced Foods
in the U.S.



MUSHROOMS
IT'S WHAT THE PLANET
WOULD ORDER.



The Blend[®]

Burgers Made Better.

Make a Difference
By Blending in
Mushrooms
For Better Nutrition,
Better Flavor and Better
Sustainability.

THE BLEND[®] IN COLLEGES & UNIVERSITIES

The Blend[®] is a movement that strives to make burgers even better by blending ground meat with chopped mushrooms, creating an incredibly delicious patty that's better for your students and more sustainable for the planet. Join the thousands of colleges and universities nationwide already menuing blended burgers.



THAT'S ALMOST
2000
colleges and universities

41% SAY
they are interested or
very interested in
serving The Blend



Data collected 2019

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THE BLEND

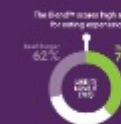
A Great Way To Make Meat More Flavorful, Juicier and Meatier.

The Blend[®] outshined the all-beef burger as a popular plant-based burger in appearance, eating experience, taste, flavor strength, juiciness, texture, mouthfeel, and overall flavor.

Mushrooms
Make Proteins
Better.



After cooking and tasting, The Blend[®] purchase intent actually increased when participants knew that mushrooms were blended with beef in the patty.



The Blend[®] Simply
and Naturally Tastes

Based on a blind sensory test comparing The Blend[®] 50/50 to a standard beef burger, an all-beef burger, and a popular vegetarian burger.

The Blend[®] also outshined a 100% plant-based burger in taste and overall eating experience, based on a blind sensory test.

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For inspiration and recipes visit Blenditarian.com.

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THE BLEND AND THE POWER OF '&'

MEAT. MEET MUSHROOMS.

Research shows consumers are looking for a meat alternative that is sustainable, delicious, and easy to cook. The Blend[®] is a meat alternative that is sustainable, delicious, and easy to cook.

- ✓ Meat alternatives
- ✓ Sustainable
- ✓ Delicious
- ✓ Easy to cook
- ✓ Versatile
- ✓ Meaty
- ✓ Meaty
- ✓ Meaty

WHY UNIVERSITIES ARE GOING PLANT-FORWARD WITH THE BLEND

The Blend[®] is a movement that strives to make burgers even better by blending ground meat with chopped mushrooms, creating an incredibly delicious patty that's better for your students and more sustainable for the planet.

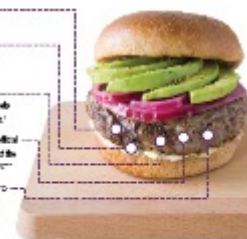
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BLENDITARIAN

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BLENDITARIAN

Reimagine the Burger with THE BLEND

WHY THE BLEND IS RIGHT FOR TODAY!

BETTER FLAVOR: Take advantage of the season's mushrooms to simplify the flavor of meat. You'll get some of the best tasting burgers ever.

BETTER FOR GUESTS: By adding in more 2-in-1 chopped mushrooms to your burger, you can reduce calories, fat intake, cholesterol and sodium.

THE BLEND - NOT JUST FOR BURGERS: Use this culinary technique and blended finely chopped mushrooms in your tacos, meatballs, lasagna, pasta sauce, meatloaf and more. It's made for chefs, cooks, and foodies.

BETTER FOR THE PLANET: New research shows mushrooms are one of the most sustainable products grown in the U.S. The Blend makes meals more sustainable and saves on natural resources and environmental impact.

A TRUE POWER BURGER: The Blend adds more nutrients to the plate like vitamins D, potassium, B vitamins, selenium and antioxidants - making it one of the only burgers with so many beneficial properties.

BETTER FOR TAKEOUT: Blended burgers are juicier because of the meatiness. They hold better without getting soggy, making them perfect for takeout or delivery.



IT'S A POINT OF DIFFERENCE THAT MAKES A DIFFERENCE.

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For more information about The Blend, as well as great recipes visit Blenditarian.com.
What you'll find there: the recipe to change - to your customers, your bottom line and the planet.

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Foodservice Recipes: The Blend



Beef and Maitake Mushroom Meatball Burgers with Tomato Butter Sauce

Recipe Courtesy of Chef Jenn Louie of Lincoln Restaurant



Catalonia Burger

Ground chuck blended with shiitake mushrooms, romesco, grilled spring onions, salsa verde aioli, butter lettuce on a toasted brioche bun.



Hult-a-Burger

Kentucky proud beef, button mushroom patty topped with hultacode queso fresco, avocado crema, crispy potatoes, cilantro & red onion on a local bolillo bun.



Muenster Stuffed Veal And Mushroom Burger

A homemade burger in 20 minutes flat is possible when you're making this Muenster Stuffed Veal and Mushroom Burger. Simply blend tasty ingredients like ground veal, chopped white button mushrooms, and breadcrumbs to make your patties, grill those burgers to perfection, and serve on toasted ciabatta rolls topped with a delectable steak sauce topping.



Mushroom and Beef Tacos with Salsa and Cotija Cheese

Mushroom Blend recipe courtesy of the Culinary Institute of America and the Mushroom Council



Spicy Moroccan Mushroom Meatballs With Harissa Aioli

Courtesy of the Culinary Institute of America and the Mushroom Council.



HERE. THERE. EVERYWHERE.
**EVERYONE'S EXPLORING
MUSHROOMS!**

