



EXPORT CONFERENCE 13TH MAY 2025

**LUBOŠ KASTNER
LIVING THE TURNING POINT OF
EUROPEAN GASTRONOMY**

GASTRONOMIC CYCLE 2019-2025 – CZ & EUROPE

DEMAND DRIVEN
ORGANIC GROWTH

TECHNOLOGY:

Price increases, delivery, systems, marketing
Fast Food concepts development, bistros & cafeterias

EXPERIENCE:
premiumisation &
consolidation

2019

2020

2021

2022

2023

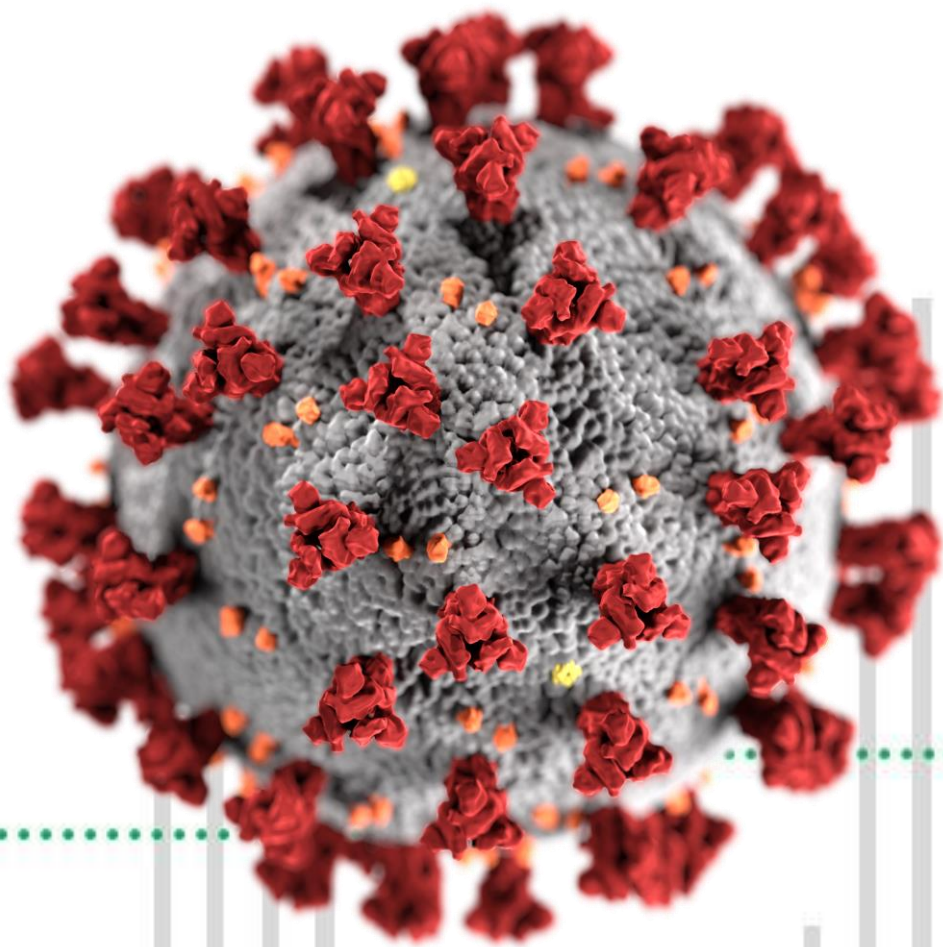
2024

2025

-11%

-6%

-2%



LOCATION CONSOLIDATION :

cities vs villages. Due to price
increase, village gastro life under
pressure

CONCEPT
DIFFERENTIATION:

all day bistros winning
over pubs

VILLAGE PUB:

Traditional basic formats in decline

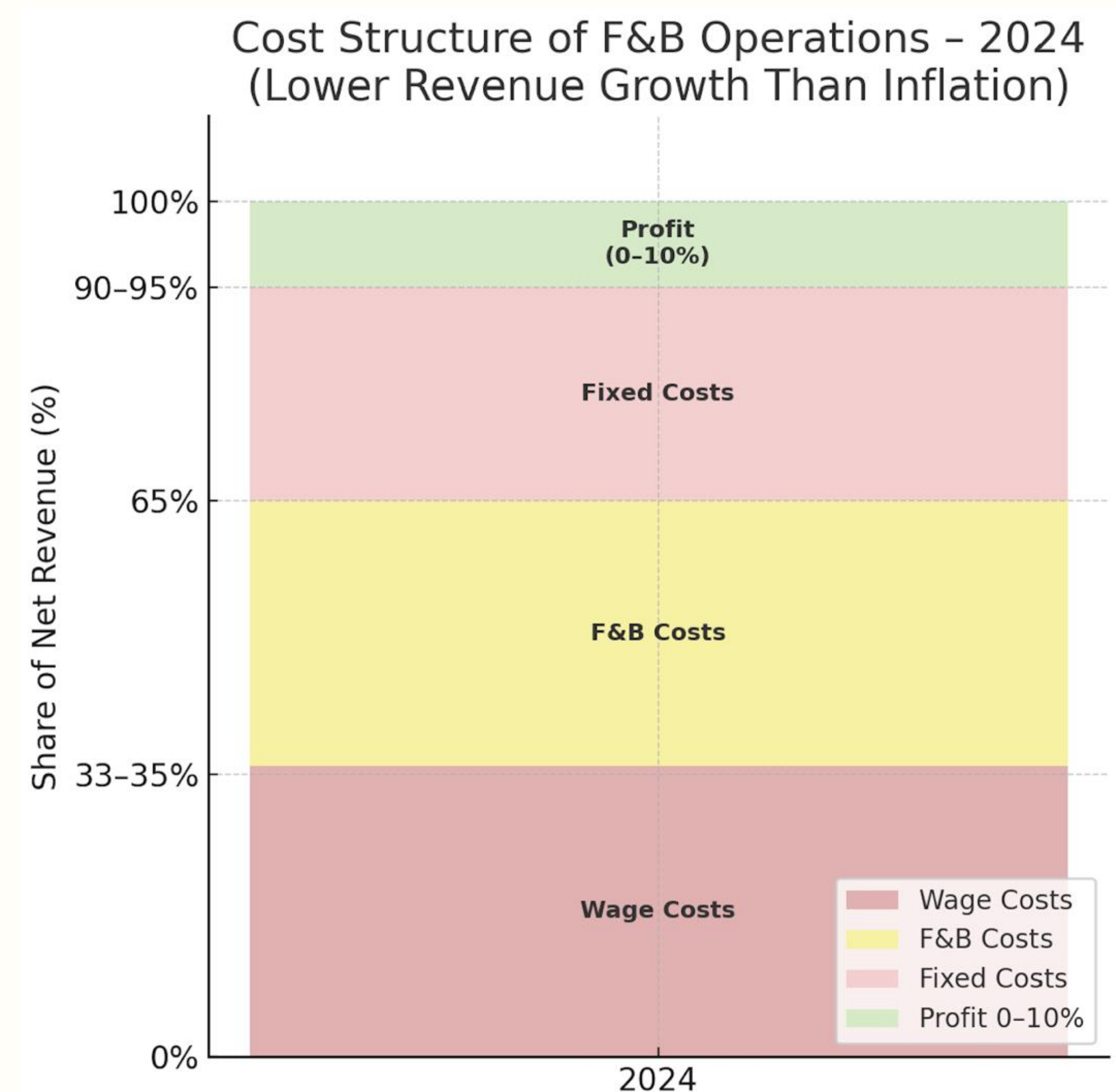
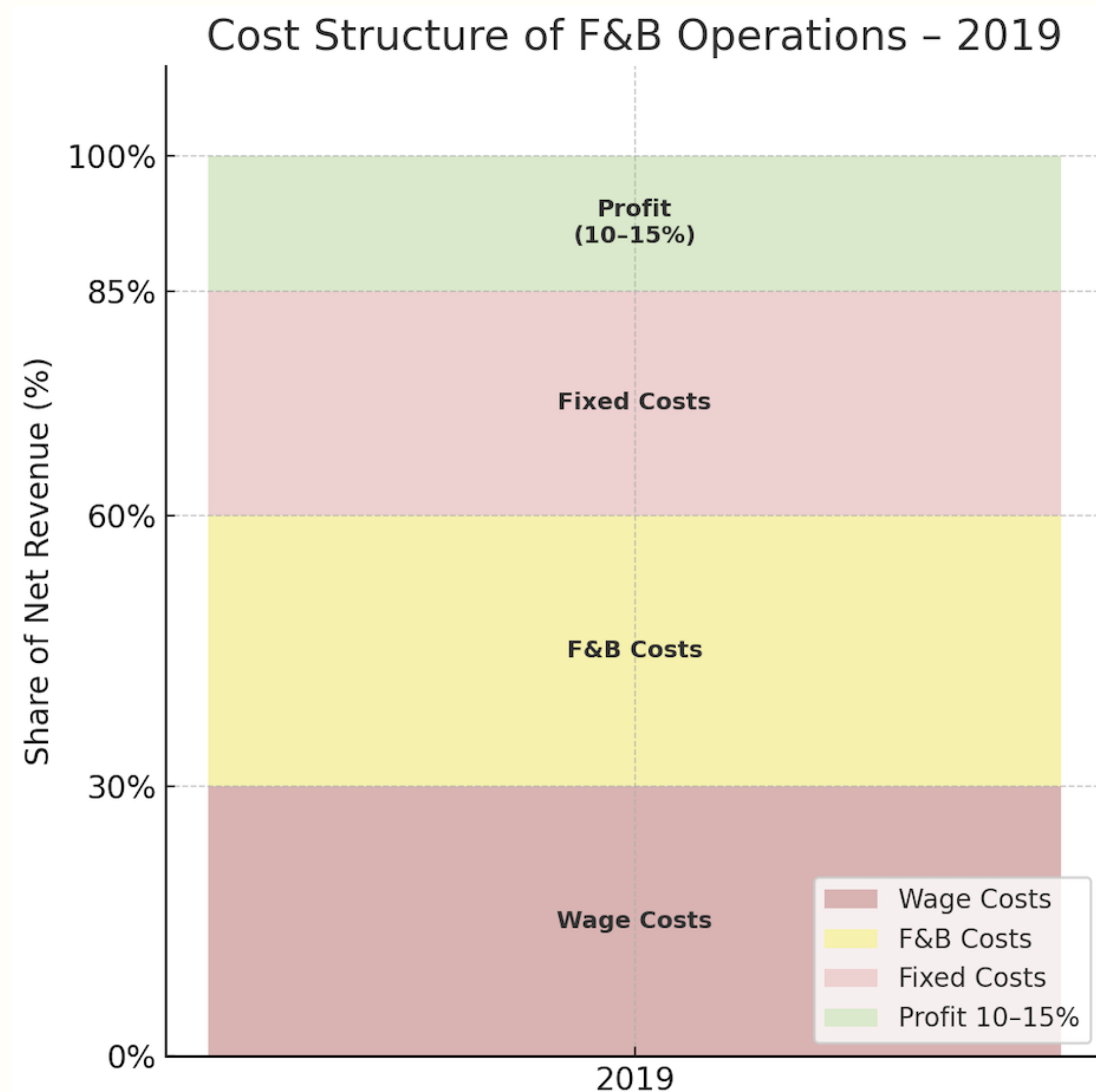
NIGHT LIFE

in decline and restructuring



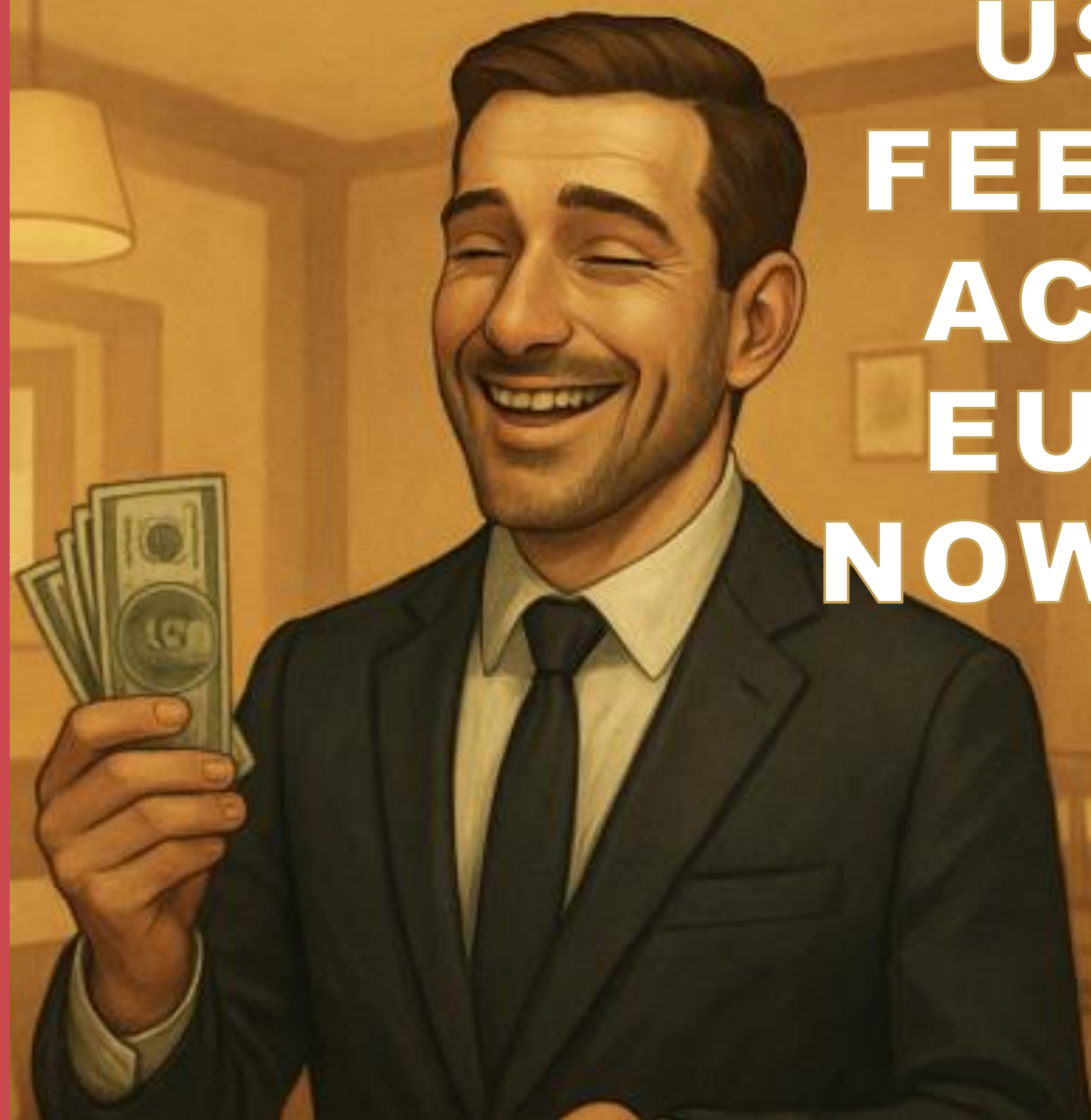
DEMAND CHANGED DUE TO EXTERNALITIES; KEEPS CHANGING

HOW DOES IT FEEL TO BE A PUB OWNER?



PROFITABILITY UNDER SEVERE PRESSURE

2019



**USUAL
FEELINGS
ACROSS
EUROPE
NOWADAYS**

2025



7 KEY CENTRAL EUROPEAN TRENDS

- **FROM FOOD TO EXPERIENCE:** Restaurants are evolving into stages for lifestyle expression, not just places to eat. Emotions, atmosphere, and storytelling.
- **AUTHENTICITY & VALUES:** Tell the story – the origin of ingredients, local sourcing, and ethical principles. Sustainability is no longer a bonus; it's an expectation.
- **ECONOMIC PRESSURE & NEW MODELS:** Rising costs are pushing businesses to rethink offerings and adopting flexible operating models (hybrid teams, shared kitchens).
- **CUSTOMER POLARISATION:** Some guests seek unique, curated experiences, while others focus on function, price, and ethics. Tailor the offer to each segment.
- **CONCEPT DIVERSIFICATION:** There's growing space for both upscale bistro-style dining and efficient everyday lunch spots. A single universal format is no longer sufficient.
- **REDEFINING QUALITY:** Quality today includes not just taste, but also values, originality, aesthetics, and transparency.
- **NEW LUNCH PARADIGMS:** Changes in work rhythm and lifestyle are driving demand for fresh formats – fast, high-quality, and accessible lunch solutions.

7 KEY TRENDS IN GASTRONOMY



FROM FOOD TO
EXPERIENCE



AUTHENTICITY
AND VALUES



ECONOMIC
PRESSURE AND
NEW MODELS



CUSTOMER
POLARIZATION



CONCEPT
DIVERSIFICATION



REDEFINING
QUALITY



NEW LUNCH PARADIGMS

3 MOST EFFICIENT BUSINESS GROWTH WEAPONS

1) QUALITY

- Delivering **ABOVE AVERAGE F&B INDULGENCE**
- Driving **ABOVE AVERAGE CONCEPT PERCEPTION** standards

2) MARKETING

- Ability to drive and **MAINTAIN TRAFFIC**
- Communicating broader customer **EXPERIENCE**
- **BUILDING COMMUNITY**

3) SEAMLESS EFFICIENT OPERATION

- **SIMPLE AND FOCUSED CONCEPT** – choose your territory and play within
- **EFFICIENT MENU** – Right mix and rotation of offering wins over static complexity
- **OPERATIONS** – simplify your management routines and involve consistent data set based decision making
- **PROCUREMENT** - Get best purchase price for all cost items everyday



WHO SHOWS THE WAY?

- **SHARP FOCUSED CONCEPTS** with profiled and understood customer offering
- Places, where **BEER QUALITY IS OF NO QUESTION**
- Concepts with consistently **ATTRACTIVE MARKETING PROFILES**
- Strong **LEADERSHIP OF THE OWNERS**
- **PROVEN SKILLS** or expertise in gastro function



LOKÁL

- **WHY LOKÁL WINS:**

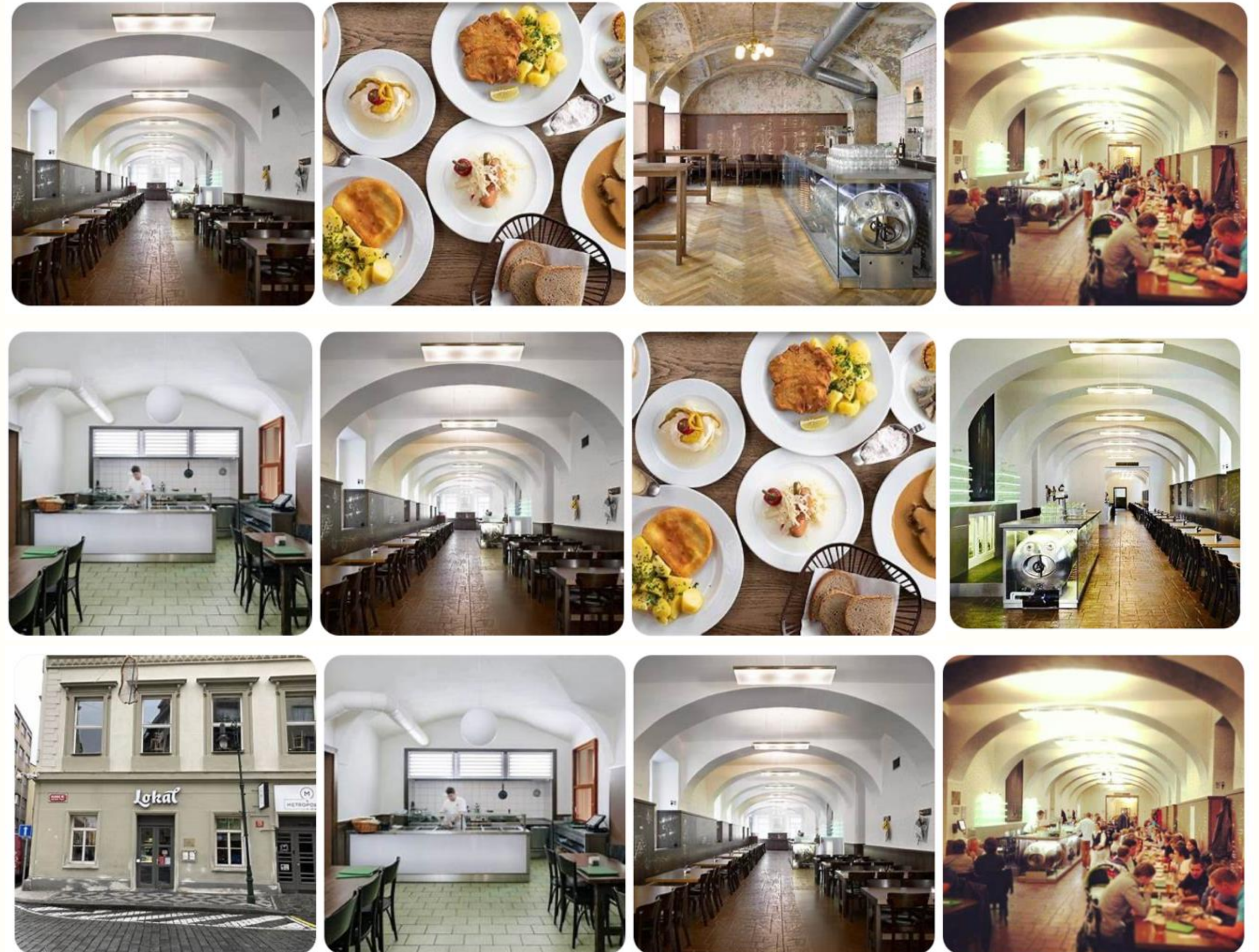
- Always good rent (3-5% of net sales)
- Quality and speed of beer service
- Ability to provide free feeling non-stressful atmosphere for all communities
- Tank beer and communication around it
- Simple effective visuality

- **THREAD OF THE CONCEPT:**

- Average static food offering
- Too much dependant on stabile traffic
- Lower performance during lunch occasion

- **WHAT YOU DID NOT KNOW:**

- Almost 50% of sales skewed to beverages of lower margin. Lower rent needed to achieve 10% net profit margin.



ČERVENÝ JELEN

- **WHY ČERVENÝ JELEN WINS:**

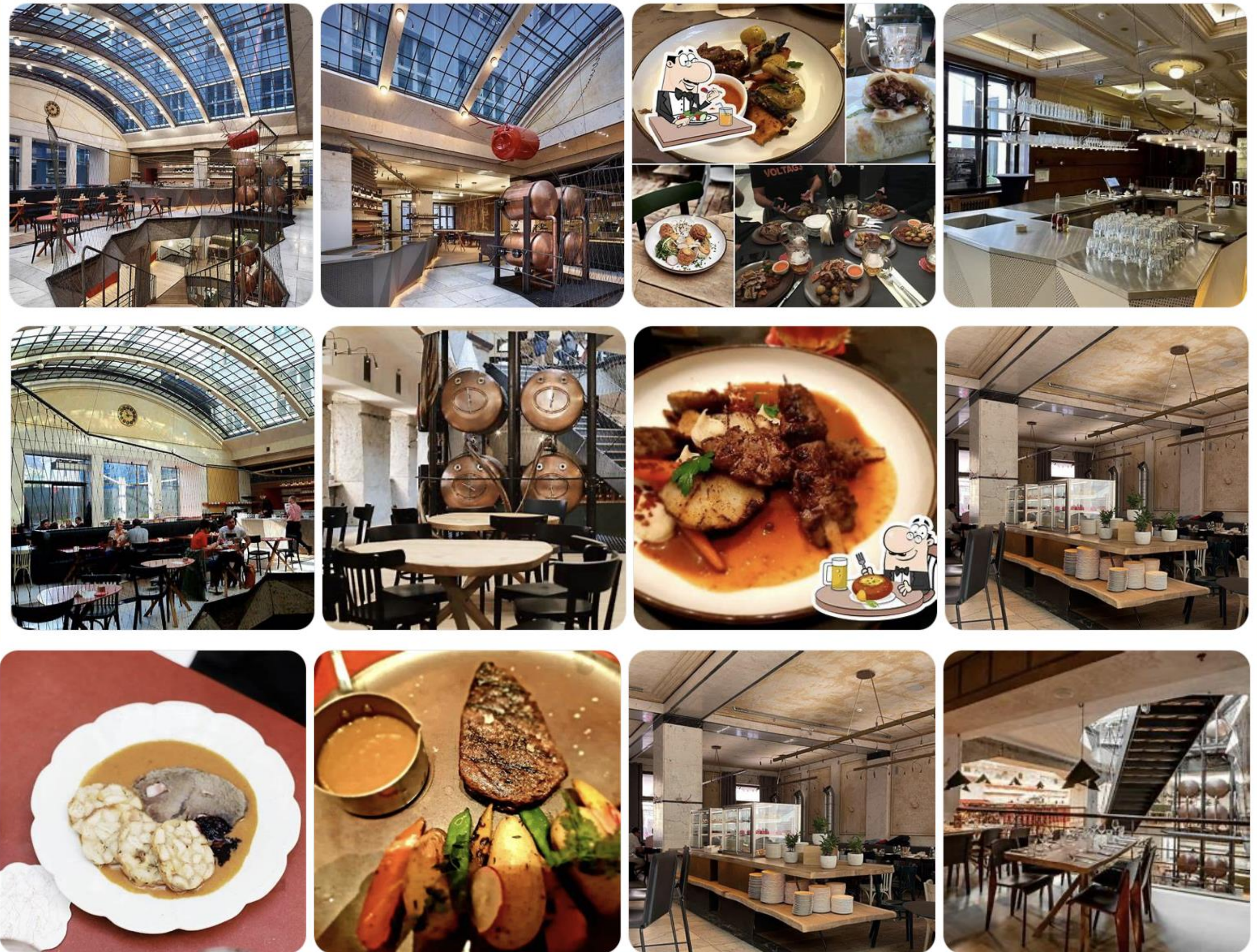
- Unique premise working with mood enhancing experience (music, temperature, light, smell)
- Process discipline enabling quality food and beverages quick service
- Top quality of food & beverages & sweets
- Open fire for cosy atmosphere

- **THREAD OF THE CONCEPT:**

- Staying relevant even at higher price point

- **WHAT YOU DID NOT KNOW:**

- Events create 30% of business
- 97% of visitors are Czechs
- Own beer tapping school



DVA KOHOUTI

- **WHY DVA KOHOUTI WINS:**

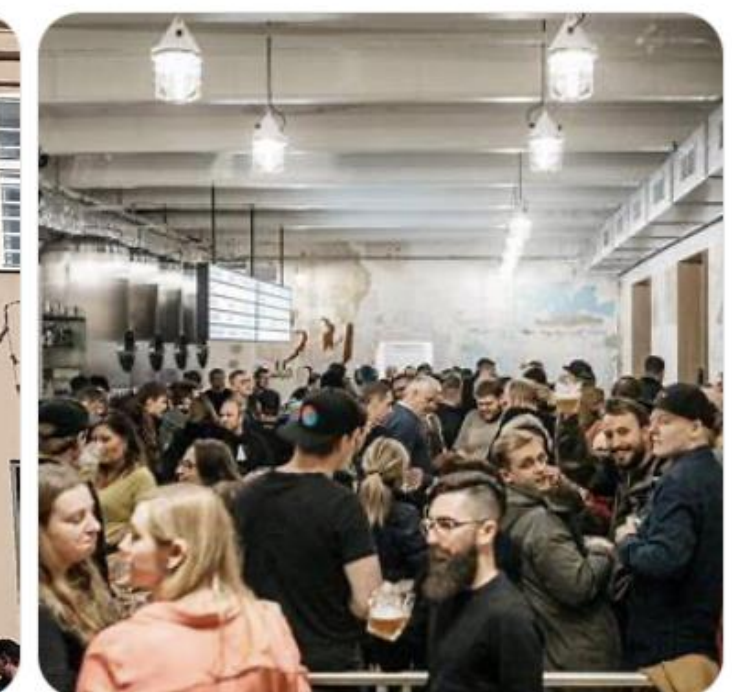
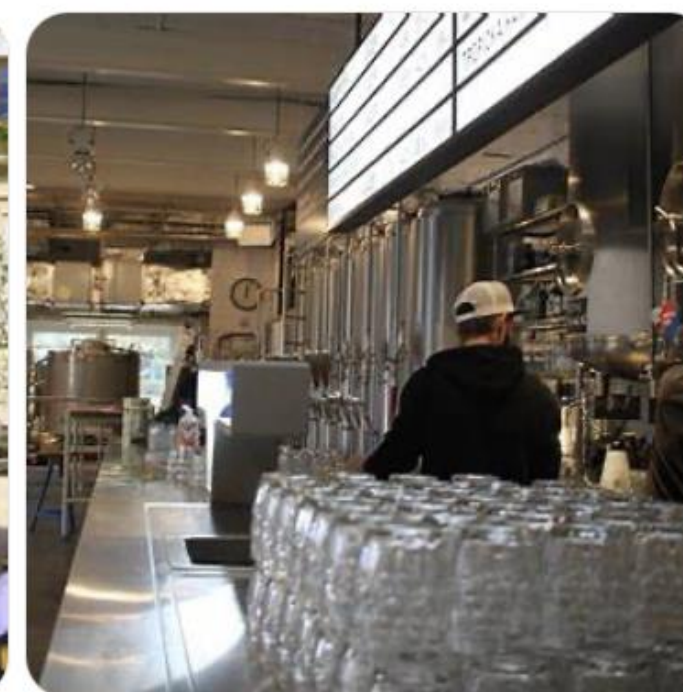
- Fantastic beer garden
- Quality of beer & microbrewery production display
- GenZ & KOLs effective marketing (activating the crowd through events & DJs)

- **THREAD OF THE CONCEPT:**

- Complicated food offering
- Ordering at the counter

- **WHAT YOU DID NOT KNOW:**

- Beer can be tapped directly from the tanks
- Pivovar Broumy just won the World Beer Cup (Zwickelbier)



U MATĚJE

- **WHY U MATĚJE WINS:**

- Great interior design and beer garden
- Famous chef
- Traditional recipes cooked in exceptional way
- Owners of U Matěje create majority of the network business for the restaurant

- **THREAD OF THE CONCEPT:**

- Too dependant on one person's image

- **WHAT YOU DID NOT KNOW:**

- There are 61 owners / shareholders of the concept
- 12 seats VIP dining experience
- Strong wine expertise



PULT

• WHY PULT WINS:

- Beer offering variety – rotating in time
- Great quality beer care and pouring
- Lager focused
- Open 3pm-2am

• THREAD OF THE CONCEPT:

- Insufficient food offering
- Air condition in summer

• WHAT YOU DID NOT KNOW:

- Pult is usually open until morning hours, so it serves as bar for staff from other outlets
- Pult serves all beers into same non-branded glass and always in “Hladinka” style



WHY BUDVAR EXPORT CUSTOMERS WIN



TASTE PROFILE STABILITY

critical for export/import



BETTER FOCUS

focus on core lager



BETTER LAGER MARKETING

insightful, consistent, impactful



BETTER TEAM SPIRIT

look around



BETTER SALES SUPPORT

feel every day



BETTER LAGER & CONCEPT KNOW-HOW

feel tonight



**GOOD LUCK IN
YOUR EFFORTS!**

LUBOŠ KASTNER