

10



---

 *future*  
shape our tomorrow





## Autogrill.10

Ten years of sustainability looking at the future.

# Ten years of sustainability looking at the future

This year Autogrill will celebrate the 10th anniversary of its Sustainability Report. What does it mean for the Group and its stakeholders?

Making sustainability an integral part of our culture and our way of doing business implies making the top management and all employees aware of the increasingly demanding requirements and changes imposed by the market and by society in general. In this long training process, the Sustainability Report played an important role and today we can confirm that it represents one of the privileged channels for communicating with the Group's stakeholders, both internally and externally.

What changes did this new approach to sustainability bring about?

In these years we have worked hard in order to facilitate full integration between corporate economic-financial decisions and sustainability policies, thanks also to broader employee sharing and engagement. The result was the development of a true international laboratory of initiatives and projects hinged on sustainability, including the LEED Gold certified Villorresi Est service station, outside Milan, developed according to the Design For All standards; the Delaware Welcome Center, the service station in the US designed according to the highest standards of energy efficiency and carbon footprint and, last but not least, the O'Hare Urban Garden, the world's first "aeronic" garden, at the Chicago airport. These are all examples that confirm the relevance of sustainability as a competitive factor and business lever.



*“In these years we have worked hard in order to facilitate full integration between corporate economic-financial decisions and sustainability policies.”*

Gianmario Tondato Da Ruos  
CEO Autogrill Group

How can sustainability support the growth of the Group?

We are convinced that developing business in a sustainable way is consistent with our Group's long-term strategy. For this reason, in 2007, we introduced Afuture, a program that led to the definition of a true sustainability strategy through a Roadmap of objectives in three different areas: People, Planet and Product. This strategy is also based on the development of consolidated partnerships with enterprises and institutions, including FAO or the University of Gastronomic Sciences in Pollenzo (UNISG). The "Bistro" concept – in fact – is the result of the collaboration stipulated with UNISG. This project marked a "great transformation" in our company in relation to catering services on the go. A place where tradition and modernity merge smoothly, combining international values and local production, creativity and responsible use of resources.

## How is the commercial offering changing according to the Afuture philosophy?

Autogrill offering is increasingly oriented to shared value creation through the development of new concepts and agreements with the sector's most innovative brands. This model focuses on highlighting the importance of local products and traditions, while re-discovering hand-made production through a renewed interpretation of the new dietary styles in accordance with consumer orientation and environmental protection regulations. These elements are perfectly reflected in Il Mercato del Duomo, our flagship store, which opened in May in Milan.

## What developments does the future hold?

We are already witnessing epochal changes that result in companies' implementing new organizational and business models. In the upcoming years, consumer attention to and awareness of social and environmental aspects will definitely increase. Our stores will feature different formats in terms of design, type of products and services, but always in synchrony with the Group's sustainable model of catering. Thanks to its integrated sustainability approach, Autogrill will be ready to capture and apply these new trends to the stores. These will become places where economic efficiency concepts increasingly merge with quality, excellence and eco-compatibility.



*Autogrill has partnered with the University to create concepts incorporating a new vision of food & beverage for travellers combined with sustainable quality.*

*The first achievements of this collaboration were Bistrot and Il Mercato del Duomo. The relationship with local areas is the essence of our partnership, as well as a shared objective to shape the future of travel food & beverage.*

*Carlo Petrini, President and founder of the University of Gastronomic Sciences, Pollenzo*



*We're excited about Autogrill's working with FAO on an inclusive business model as the basis for sustainable food systems.*

*The need for the promotion and achievement of more inclusive and efficient agricultural and food systems at local, national and international levels is a priority for FAO.*

*Eugenia Serova, Director AGS, FAO*



# Autogrill sustainability milestones

## The reporting

First Sustainability report.  
The Group took the first steps towards developing sustainability projects.

2005

2007

## The laboratory

Development of Afuture. The project aims at innovating Autogrill stores according to a vision that combines eco-compatibility and energy efficiency.

## The vision

Autogrill sustainability model: the 3 "Ps" People, Product and Planet. Sustainability evolved from philosophy to strategy.

2010

2011

## Roadmap: Shape our tomorrow

Within the "Route to Innovation" the Afuture Roadmap was launched, identifying the sustainability objectives to be achieved by the Group.

# The Group evolution

1947

The first Autogrill store opens on the Milan-Turin motorway.

1977

Autogrill SpA is born from the merger of the motorway catering operations of Motta, Pavese and Alemagna.

1995

Autogrill goes private. Edizione Holding becomes the majority shareholder.

1997

Listing on Milan Stock Exchange.

1999

Autogrill acquires HMSHost in the US.

2005

Autogrill enters the travel retail & duty free sector by acquiring Aldeasa.

## Monitoring

Definition of the actions by the Business Unit and launch of the monitoring phase.

2012

2013

## Bistrot and Villoresi Est

Development of two flagship stores, the Group's international best practices for sustainable innovation.

## New vision, mission and values

Design of a materiality matrix defining the sustainability issues most pertinent to Autogrill.

2014

2015

## The new 2016-2018 Roadmap

New sustainability objectives to be reached by the Group in the 2016-2018 period.

2007

Acquisition of Alpha Group, a leading in-flight catering (business sold in 2010) and retail business.

2008

Acquisition of World Duty Free (WDF) and completion of the acquisition of 100% of Aldeasa.

2012

Integration of duty free activities: World Duty Free Group is born.

2013

Autogrill demerges its travel retail & duty free business.

2015

New focus on F&B business: "Il Mercato del Duomo", a new flagship store, is born.

# Where we are today...

## Our vision

To be recognized as the **world's best organization** in the provision of F&B services for travelers for accountability and customer focus.

## Our mission

We want **travelers** to reach their destination **happier, safer and more satisfied**, thanks to our services. We add quality to their time and make the journey more pleasant by adding value to the experience, be it about eating, drinking or making purchases.

## Our values

- ♥ Be passionate
- ◆ Be open
- ✦ Set the pace
- Be reliable
- 📄 Keep it simple

## A Future Framework





## 2012-2015 Afuture Roadmap

### A-People

#### Health and safety

- reduce injuries by 5%

### A-Product

#### Packaging

- rethinking disposable from a sustainable standpoint
- reduce costs by 5%

Strategic  
goals

### A-Planet

#### Energy

- improve energy productivity by 10% in like-for-like stores
- improve energy productivity by 30% in new stores
- at least 30 stores LEED-certified

#### Water

- reduce water consumption by 10% in like-for-like stores
- reduce water consumption by 30% in new stores

“WWF and Autogrill work together on the collaboration project hinged on the concept of “food waste” developed at the Villorresi Est service station. The project aims at developing supply chains with a lower carbon footprint. Actions include the broader WWF One Planet Food project on one hand, and, on the other, the Afuture sustainability programme, promoted by Autogrill.”

Paola Silva, Corporate Partnership Manager WWF Italia

“Obtaining LEED® certification is the best opportunity, for all Italian operators, to get in line with Europe’s 2020 objectives, thus ensuring competitive edge for themselves and enhanced credibility for the country as a whole. For GBC Italia it is a source of great satisfaction to see that more and more clients have, like Autogrill, integrated these tools into their business processes and are working to boost their competitiveness whilst caring for the environment and citizens’ wellbeing.”

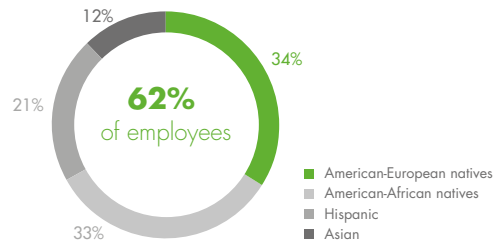
Mario Zoccatelli, Chairman of Green Building Council Italia



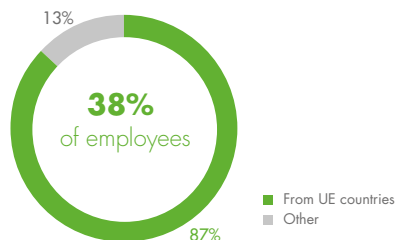
We want to **take care of our employees** so that they can **provide value added services** to customers and the local community.

**54,408** employees  
**61%** women  
**30%** of employees are aged 21-30

### North America & Pacific



### Europe



### Involvement and communication

**Do you Feel good?:** the employee engagement survey involving the over 20,000 employees of the European Countries.

**Aconnect:** the Group intranet, available in 7 European countries, accessible to more than 18,000 employees. In the USA, in addition to the intranet, some departments create dedicated newsletters.

### Welfare and Worklife balance

**"Autogrill Per Noi"** and **"Buon per me"**, two of the programs dedicated to work/life balance.

### Development

New **employer branding campaign** to share the new corporate values chosen by the employees.

**Diversity** valorization in the Group: 33 tongues in 29 countries.

**Academy:** international training program.

Consolidation of the Group's organizational model thanks to advanced HR policies: employee appraisal and development team development and international structures.

**People First:** training pathway for employee improvement launched in North America.

### Health and safety

**HSE committee** in Italy to monitor injuries, health surveillance and work-related illnesses.

**Ergos:** a project made in France to identify, analyse and reduce the number of accidents at work.

### 2012-2015 Roadmap

#### Health & safety

- reduce injuries by 5%



## Development and involvement of the Community

Over 4 billion euro donated through direct and indirect contributions, goods and services. In the US, 121 associations re-distributed approximately 4 million food portions through the collaboration with Food Donation Connection. Every year, Autogrill Italia donates food to the Fondazione Banco Alimentare and to other local organizations.



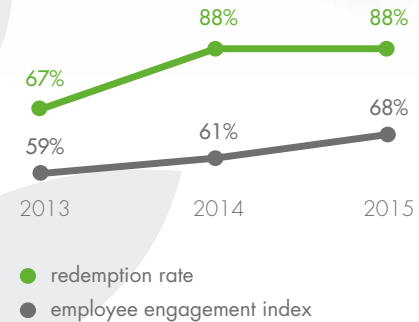
## Listening to improve

Launched in 2013, Do you Feel good? is an engagement survey targeting Autogrill employees.

The survey analyzes employee engagement in four areas:

- Satisfaction: level of satisfaction for the job;
- Advocacy: readiness to promote the company;
- Pride: feeling proud of the organization and sense of belonging;
- Commitment: level of motivation to remain in the organization based on the personal and organizational objectives.

Focus story

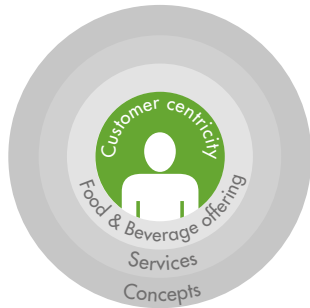


Two team-engagement campaigns were also launched in parallel: "Do they Feel good?" and "Do I Feel good?"



We want to think in an innovative way and offer products that guarantee safety and quality criteria, so that customers will enjoy and remember their experience in our points of sale.

The Group is focused on travellers and on the “customer centricity” concept.



### Involvement

Feel good: customer satisfaction survey dedicated to travelers and their requirements.

### Accessibility and Services to travelers

Design for All, Vyaggio, B4youboard, kid areas and services to truckers.

### Innovation

Culinary innovation thanks to collaborations with Culinary Council, UNISG and Celebrity Chef. Spazio Fucina: the laboratory dedicated to experimentation and gastronomic innovation.

### Partnership

Long-term partnerships with landlords, brand partners and suppliers.



1st Prize

Schiphol Consumer Award,  
Airport Revenue News Award

### Quality and safety

Programs and systems for supply chain monitoring: Haccp, Autogrill Excellences Audit, Mystery Client.

Certifications: ISO9001, UNI10854, SA8000 and ISO14001.

Raw materials controls (local productions, seasonal productions, DOC, DOP and DOCG) and correct and balanced diet programs.

### Packaging

An European project launched in 2013 to map and re-think disposable packaging materials (envelopes, cutlery, plates, etc.) in order to make purchase processes more efficient and effective.

Impact reduction (raw material savings and disposal) and cost reduction thanks to the reduced weight of the plate offered for the pizza, using 100% recycled material, and for the crepes.

### Roadmap 2012-2015

#### Packaging

- rethinking disposable from a sustainable standpoint
- reduce costs by 5%



## La Fabbrica di concetti

The development of new concepts starts from an in-depth analysis of consumers and the Group's expertise: Delaware, Bistrot, Burger Federation, Harvest Market, La Tapenade, Toronto, Mercato del Duomo.



1st Prize

Villoresi Est (Innov@Retail, Dedalo Minosse and Natura 2015 awards),

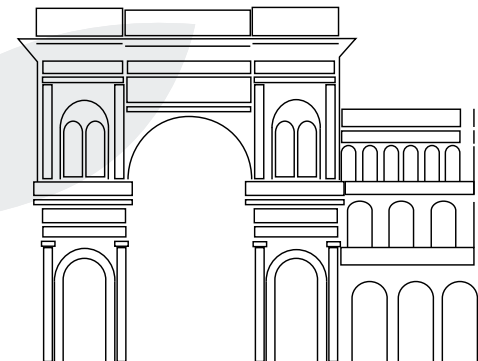
La Place (Best corporate responsibility activities),

8oz Burger Bar (FAB Awards).



4 floors

3,000 m<sup>2</sup> dedicated to customers.



Focus story

## IL MERCATO del DUOMO

The Group's new flagship store, developed in collaboration with the University of Gastronomic Sciences, features a unique and innovative path that includes:

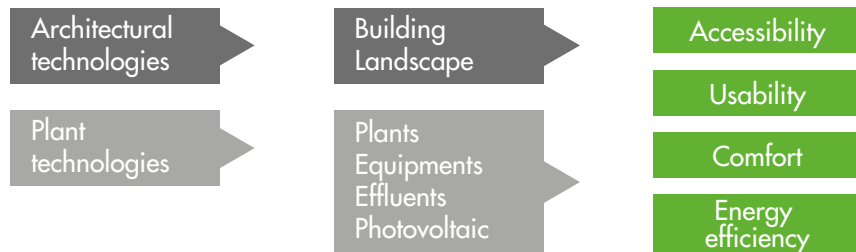
- Diet: innovative quality and sustainable formulas;
- Architecture: design highlighting the historical importance of the building;
- Territory: local traditions and hand-made processes;
- Concept: Motta Caffè Bar, Il Mercato, Bistrot Milano Duomo, Terrazza Aperol, Spazio Milano, Le Bollicine del Duomo.

Each floor reflects:

- a progressive processing of the ingredients;
- different consumer experiences: from quick to slow.

We want to **protect the environment** by engaging our partners and suppliers, with the participation of our employees and customers.

## Sustainable innovation in stores



## Involvement

**Employees:** "Go Green" (on Aconnect) with good responsible work practices.

**Startsomewhere:** US program about eco-sustainability initiatives.

Online seminars and survey on environment.

**Consumers:** waste segregation, use of organic and jute bags.

## Waste management

Collection and recycling systems.

**Italy:** the WWF project for the development of an integrated supply chain against food waste generation with the participation of Villoresi Est,

Brianza Nord and Sud service stations.

**USA:** implementation of collection and recycling systems in the processing stage.

**France:** engagement of customers in separating trash (PET plastic-aluminum).

Elimination of plastic in take-away packaging.

## Energy efficiency

**In Italy in 2014:** energy consumption down 1.6% on like-for-like stores and energy productivity index up 5% vs 2013. Mensa di Ravenna, Viverone Est and Ovest: 30% reduction of energy consumption thanks to geothermal plants implementation.

**In France new stores:** energy efficient technology and plants generating energy from renewable sources.

**In all main countries:** Panini Grilli High-Speed Hot Plate developed with Electrolux, reducing energy consumption by 50%.

## 2012-2015 Roadmap

### Energy

- improve energy productivity by 10% in like-for-like stores
- improve energy productivity by 30% in new stores



## Environmental certifications

**LEED** (Leadership in Energy and Environmental Design): 17 stores

ISO14001 - EMAS, California Green Building Code and California Energy Standard

**HQE** (High Environmental Quality) and **BBC** (Low Energy Building) – Canaver and Ambrussum (France).

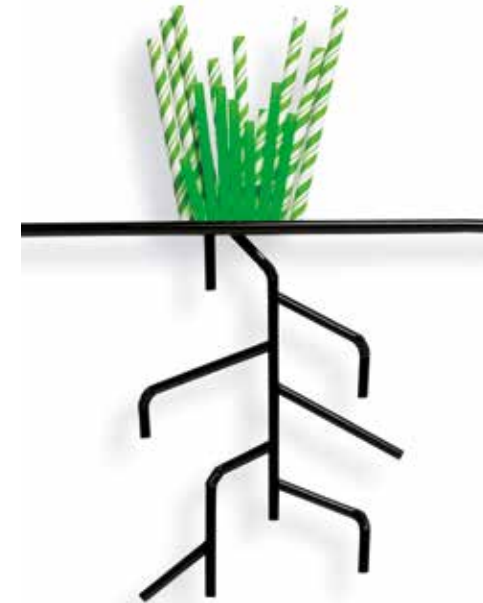
## Water management

Use of rainwater where possible. Mechanical self-cleaning system replacing the traditional water-based system. Installation of water sensors, dual flow faucet and air/water mixing valves. Use of sensors for the provision of water.

## 2012-2015 Roadmap

### Water

- reduce water consumption by 10% in like-for-like stores
- reduce water consumption by 30% in new stores



## Focus story

## VILLORESIEST



The Group's international best practice for sustainable innovation. It implements virtuous solutions that can be replicated in other stores of Autogrill's world network:

- Volcano shape to concentrate excess heat upward while reducing energy used for heating and cooling;
- Geothermal plant with 420 probes to generate more than 380 kW, meeting 85% of the total requirement in winter;
- 350 m<sup>2</sup> roof coverage to capture solar energy or cold;
- LED lighting indoors and outdoors;
- Collection of rainwater and groundwater for air conditioning, irrigation, toilet flushing and the fire-fighting reserve;
- Certifications: LEED Gold - EMAS - ISO14001;
- Design for All.

## In the US...

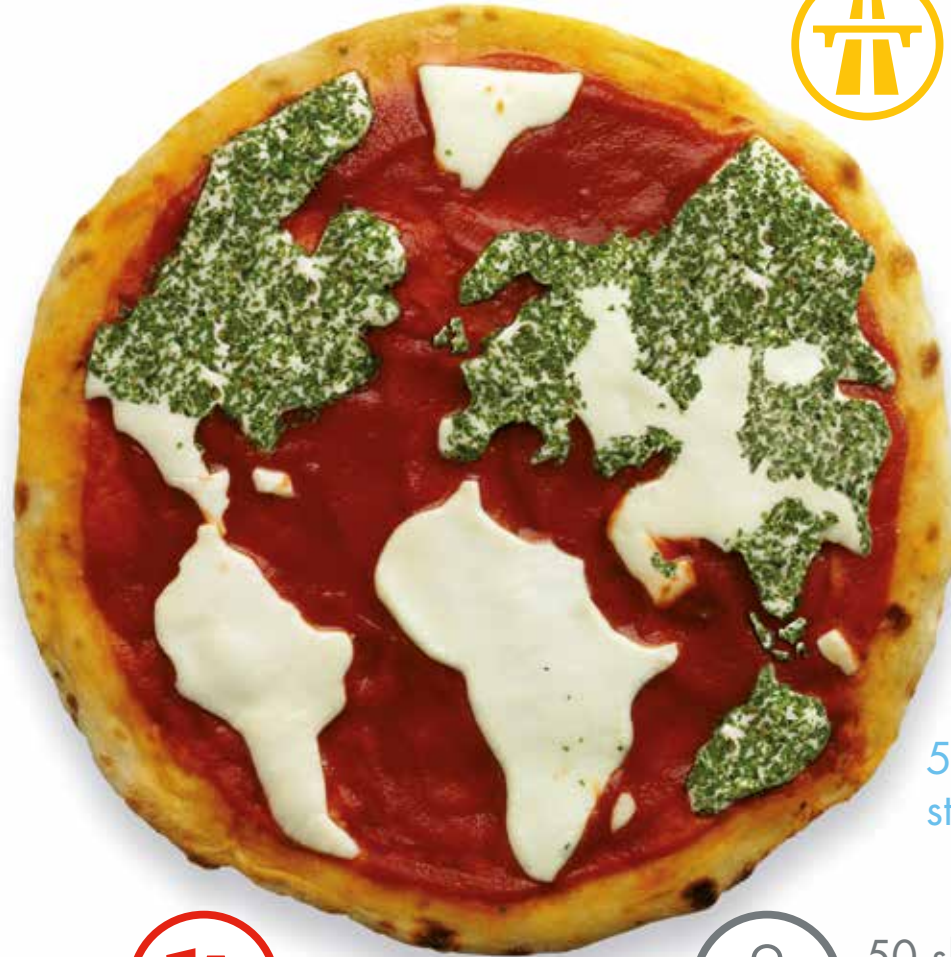
**Delaware Welcome Center** was Silver LEED-certified by the US Green Building Council. It features a geothermal energy plant with 60 wells and recharging stations for electric cars and it also incorporates recycled materials.



# Sustainability concepts

Nearly 1,000 locations  
all over the world

|                |                      |
|----------------|----------------------|
| Australia      | Malaysia             |
| Austria        | New Zealand          |
| Belgium        | Poland               |
| Canada         | Russia               |
| China          | Singapore            |
| Czech Republic | Slovenia             |
| Denmark        | Spain                |
| Finland        | Sweden               |
| France         | Switzerland          |
| Germany        | The Netherlands      |
| Greece         | Turkey               |
| India          | United Arab Emirates |
| Indonesia      | United Kingdom       |
| Ireland        | USA                  |
| Italy          | Vietnam              |



722  
highways



144  
airports



51 railway  
stations



27 cities



50 shopping  
centers





## Green building concepts

Ontario highways



Ontario (Canada)

Delaware Welcome Center



Delaware Turnpike (USA)

O'Hare Urban Garden



Chicago Airport (USA)

Villoresi Est



Milan (Italy)



## Healthy & local food

Il Mercato del Duomo



Milan (Italy)

Harvest Market



Belfast City, Dublin and Amsterdam Schiphol airports

La Place



Bali International and Amsterdam Schiphol airports

Bistrot



Düsseldorf, Frankfurt, Helsinki, Montreal and Roma Fiumicino airports, Milano Centrale railway station

Greens



Bern and Geneva railway stations, Zürich airport

Territoire de France



Nemours & Darvault (A6) and Blois-Villerbon (A10) service areas

# A sustainable future

## Framework

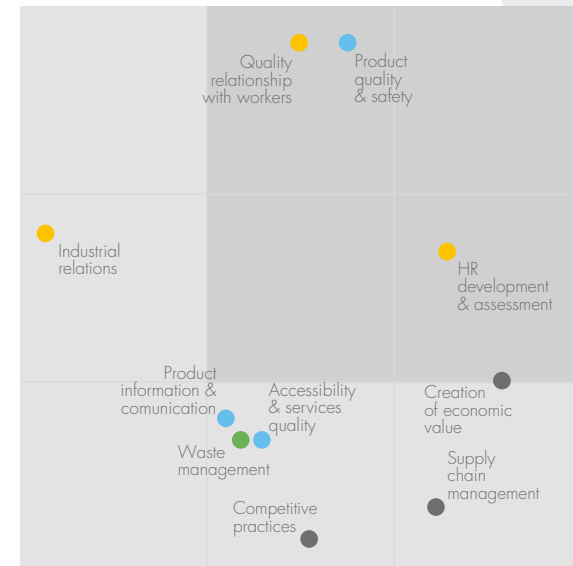
In 2014 a methodology was developed to analyze materiality more in depth and more precisely, based on the framework previously identified.

**Goal:** identifying a materiality scale to accurately measure sustainability aspects - i.e. social, environmental and governance aspects that can affect Autogrill's ability to create or retain economic, environmental and social value for itself, its stakeholders, the environment and the community at large in the long run, in order to prioritize the different management and reporting activities.

### Methodology:

1. Identification of issues
2. General internal analysis (by CSR)
3. Specialist internal analysis (by the management)
4. Analysis of the external perspective
5. Development of the materiality chart

## Materiality matrix: relevant issues



Relevant issues ● People ● Product ● Planet ● Governance

## The new Roadmap for 2016-2018

### People

- Quality relationships with workers
- HR development & assessment

### Product

- Product and service quality and safety
- Product information and communication

### Planet

- Waste management

### Governance

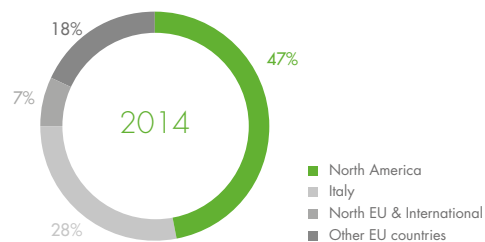
- Creation of economic value
- Supply chain management



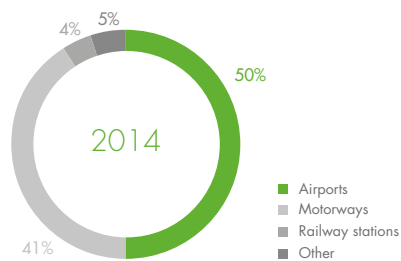
...without forgetting health & safety, packaging, energy efficiency and water management.



## F&B sales breakdown by geographic area



## F&B sales breakdown by business channel

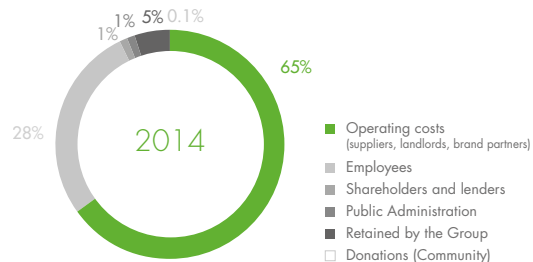


## Financial highlights

(€ million)

|                                    |       |
|------------------------------------|-------|
| Revenues                           | 3,930 |
| Ebitda                             | 316   |
| <i>Ebitda margin</i>               | 8%    |
| Net profit                         | 37    |
| Net cash from operating activities | 224   |
| Net investments                    | 196   |
| Net debt                           | 693   |

## Distribution of the economic value created by the Group



# Autogrill SpA

## Headquarters

Centro Direzionale Milanofiori  
Palazzo Z, Strada 5  
20089 Rozzano (Milan), Italy  
Tel. (+39) 02 4826.1

## Contacts

Internal Audit and CSR dept.  
Tel. (+39) 02 48263499

[www.autogrill.com](http://www.autogrill.com)

Follow us on



Coordination  
**zero3zero9** - Milan

Design  
**Inarea** - Rome

Layouts  
**Laura de Nigris** - Milan

Printed by  
**Grafiche Antiga** (TV)  
Printed on FSC paper  
Heaven 42 - Scheufelen

September 2015







follow us on



[www.autogrill.com](http://www.autogrill.com)