

# The Rise of Ghost Kitchens

The COVID crisis accelerated the adoption and expansion of Ghost Kitchens globally, as restaurants found ways to survive without on-premise dining

## Four Emerging Archetypes

### 4 Weeks

Estimated Time to Launch



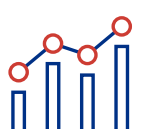
\$5.5B+

2020  
Venture Capital  
Funding



\$100B

Estimated Global  
Revenue of  
Delivery Apps



\$1T

Estimated  
Global Market  
Size by 2030

WHAT




- Secondary delivery-only branded concept(s)
- Run from existing chain kitchens
- Owned or licensed brands

TRAITS

- Simple, limited menus
- Scalable, easy to prepare
- Single category, comfort food focus

EXAMPLE

LICENSED CONCEPTS

Concept	Host Kitchen
	
	

### 1. Bolt-on Brands

- Multiple concepts, one kitchen space
- Single ordering platform

- Varied concepts
- Mix multiple brands in single order / delivery

- Kitchen United Mix 
- Deliveroo Editions 
- Ghost Kitchen Brands
- Taster   
- Cloud Kitchens 

### 2. Virtual Food Hall

- Established brick and mortar chains
- Secondary delivery only sites






- Similar menu to brick and mortar parent
- Established off-premise demand

- Starbucks 
- Chipotle 
- McDonalds 
- Chick-fil-A 
- Independents

### 3. Delivery Clone

- Digitally native concept
- No brick & mortar locations

- Comfort foods to ethnic cuisines
- On-trend delivery friendly menu

- Motu Indian Kitchen 
- Wing Daddies 
- Sunset Squares Pizza 
- Renegade Chicken 
- Deliveroo Concepts 

IT'S JUST  
WINGS



Exclusive  
Delivery  
Partnership  
DOORDASH

Launched out of

1,000

Chili's & Maggiano's  
locations in June  
of 2020 in

9 countries  
160 locations

outside the US

On pace to hit

\$150M

in sales in its  
first year

