

Guide to Getting Onboard:

What you need to know before
you make your airline product pitch



World Travel Catering®
& Onboard Services

EXPO

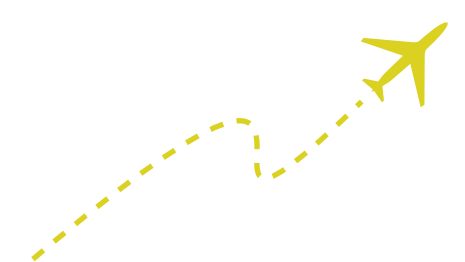
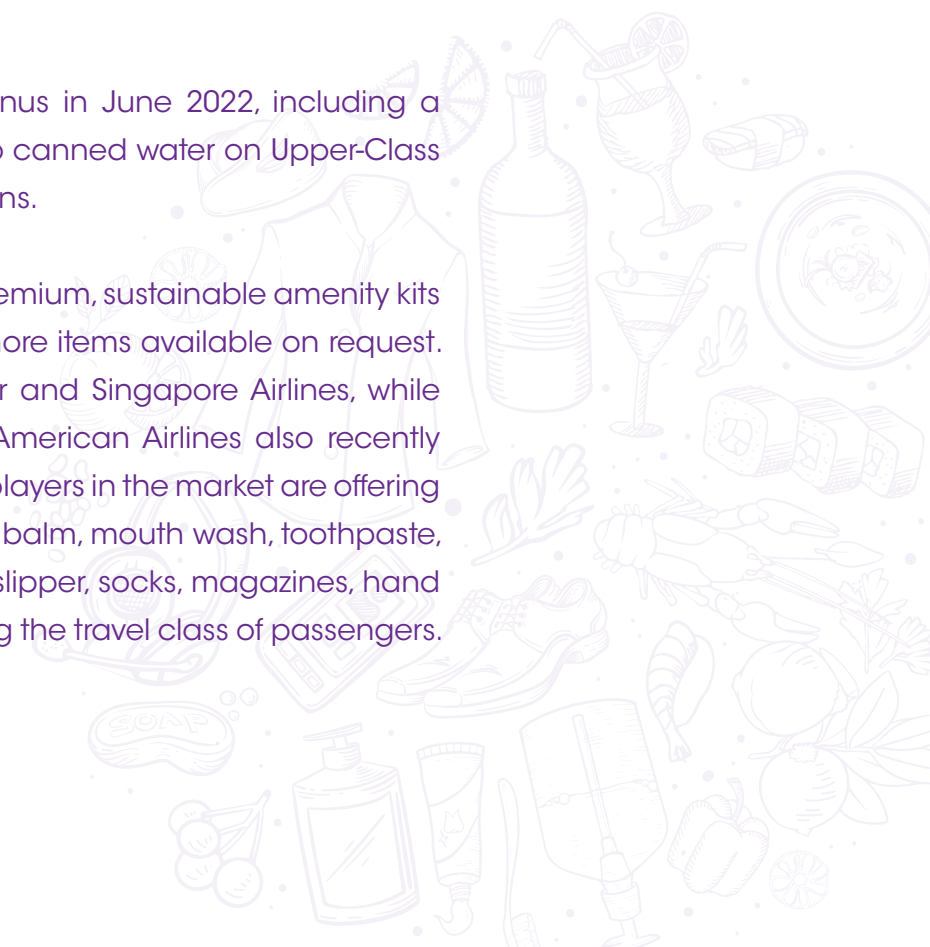
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Introduction

The global inflight catering market alone is expected to grow from **USD \$8.50bn** to reach **USD\$27.6bn by 2030**, growing by compound annual growth rate (CAGR) of 7.1% as the industry continues its post-pandemic resurgence. Additionally, the global amenity kits market size is expected to reach USD \$47.44m by 2028. The rise in both the inflight catering market and the amenity kit market is attributed to growing passenger interest in healthy and nutritious meals onboard, as well as a rise in disposable income and a willingness to pay a premium for a more luxurious experience.

Catering to these growing markets, Virgin Atlantic launched new menus in June 2022, including a wine tasting 'booth', exclusively available on its A350s. It has switched to canned water on Upper-Class services, while canned wines are served in Economy and Premium cabins.

Outside of food and beverages, many airlines are focused on offering premium, sustainable amenity kits that are useable post-flight and pared back to quality essentials with more items available on request. This is particularly true of carriers such as Delta, Virgin Atlantic, Finnair and Singapore Airlines, while Air France also recently launched new kits on long-haul flights and American Airlines also recently refreshed bedding, amenity kits and meals in its new Business Class. Key players in the market are offering amenity kits which include various elements such as lotions, creams, lip balm, mouth wash, toothpaste, toothbrushes, blankets, neck pillows, eye masks, earplugs, loungewear, slipper, socks, magazines, hand sanitiser, toiletries, fragrances, snacks, mineral water, and toys, considering the travel class of passengers.





Kelly Stevenson

These are just a sample of the launches and refreshes taking place across the aviation industry that could be waiting for your product. This comprehensive guide takes you through all the key things to consider when planning to target this area, including finding the right contacts and considerations before you pitch your products to an airline buyer. We've compiled it in association with Brand Consultant and former **British Airways Global Wine & Beverages Manager Kelly Stevenson**, and four independent brands, all of whom have exhibited at WTCE and are now stocked onboard.

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'We hope you find the report thought-provoking, useful and inspirational for your brand in the future.'

Polly Magraw,
Event Director, WTCE



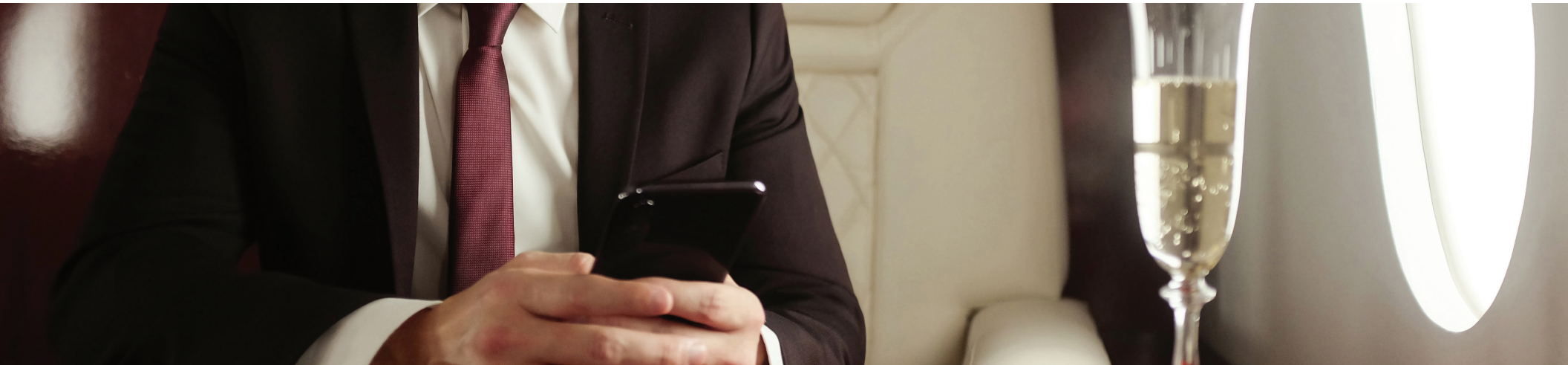
¹ <https://www.globenewswire.com/news-release/2022/09/13/2515414/0/en/In-flight-Catering-Services-Market-Size-Share-Trends-Analysis-Report-By-Flight-Type-By-Airlines-By-Airline-Class-By-F-B-Type-By-Region-And-Segment-Forecasts-2022-2030.html>

² <https://www.prnewswire.com/news-releases/amenity-kits-market-size-worth-47-44-million-by-2028-cagr-1-3-million-insights-301478295.html>

³ <https://www.virgin.com/about-virgin/latest/a-new-calibre-of-sky-high-dining-behind-the-scenes-with-virgin-atlantic>

⁴ <https://www.travelnewsasia.com/news22/129-AirFranceKits.shtml>

⁵ <https://viewfromthewing.com/american-airlines-will-introduce-new-bedding-amenity-kits-and-meals-with-new-business-class/>



READY FOR TAKEOFF?

Before you even approach your first airline, give careful consideration to how your product will fit into the airline environment, which is significantly different to a traditional hospitality or retail environment.

Space is at a premium and passengers are in confined cabins: there are those travelling for business purposes who might be there on someone else's behalf and others who are travelling for leisure and expect a great experience starting when they step onto the aircraft. The airline is under pressure to please everyone, and your product needs to help them to do that.

Think about how your offering might appeal to a mass audience but also how it differs from what passengers might find at their local bar, favourite restaurant, supermarket or health and beauty retailer.

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*'If you have something different,
and a very good reason to be in the
air, that's going to appeal
to an airline buyer.'*

Kelly Stevenson

ECONOMY OR FIRST CLASS

The airline industry is complex – ranging from private jet companies to commercial airlines, most of which have four different cabin classes: First, Business, Premium Economy and Economy. Where will your product sit best? What customer market are you targeting?

Since the pandemic, many airlines have changed their inflight business models: some that used to include food, beverages and amenity kits as part of the ticket price have flipped to a buy-onboard concept for some cabin classes.

This is important if you have aspirations to sell to airlines for two reasons:

1. Airlines may not want to give away a product in one class that they charge for in another
2. There is a disconnect between which items passengers are happy to pay for and what price the airline is prepared to pay for them

These two points mean you need to carefully consider what you want to sell to the airline and why.



QUESTIONS TO ASK YOURSELF:

Do I want to sell for a margin?

If yes, then buy-on-board is a good option. Some airlines' short-haul flights are buy-on-board. This is something to consider when deciding what airlines to pitch to first

Do I want to sell for brand awareness?

If yes, which customers do you want your products in front of? A small but very select audience in First class or even on private jets for instance, a slightly larger audience mainly travelling for business reasons, or a mass-market audience?

Unless you understand all the above it will be very difficult for you to explore listings with buyers.

The answers to the above questions are also particularly significant to minimum order quantities: you can't stipulate a minimum order of two pallets if your product is only going in First Class where some airlines have just eight seats, with first class cabins in just 30% of their fleet.

If your brand is destined for both Business and First-Class where the airline will be catering for a higher number of customers compared to just one of these classes, they will be more likely to buy a pallet load at a time. If your product is listed on the menu, they will want it, without exception, on every flight. Listing a product and then it not being available, is a big no-no!

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'Ask yourself, are you selling your product for consumption and brand awareness or are you selling it for profit? There's never much profit in small quantities, but over time the volume of orders you can get from selling to an airline is significant.'

Kelly Stevenson



BE PREPARED

Do your research and equip yourself with the right information and questions to ask before your meeting with an airline buyer. This includes understanding what types of products and services they currently have on their flights and ensuring your brand will slide into their offer seamlessly.

When it comes to your pitch, don't simply see it as a transactional conversation, but as the potential for a longer-term partnership. Also, the airline buyer might be just one person you need to know. You might also need to build a relationship with the person managing the airline catering contract; often an intermediary with autonomy over what goes onboard. Your product needs to impress everyone and not only be at the forefront of the airline buyer's mind but also that of the contract caterer.

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'80% of the people you contact never respond or give you feedback. So, every single week you need to call them again, send them a recap of what you're offering. Ask again if you can schedule a call. It's a long-term process and you have to be consistent because even if they don't need you today, when they need you tomorrow, you have to be there waiting for them.'

Alberto Topan,
SVP of Sales, The Perfect Cocktail

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'Deals are made with a lot of people in the room. If you're going to be a component part of an airline's food and beverage programme, you have to play ball, and knowing who you play ball with is one of the most important things... I'd say it's an absolute priority to know the airlines because at the end of the day, they're going to say yes or no to what goes on board their planes.'

Kelly Stevenson

Don't forget, many products that make up the onboard offer are ones the commercial airlines need constantly and in great quantities – from bread rolls to knives and forks. These are significant business for suppliers and explain why airline tenders come out so frequently as they try to secure the best price possible and avoid yearly price hikes. However, quality is still a major consideration for the airlines.

Finally, be open and honest from the outset. If you're developing something new, but it's not quite ready to launch, let the airlines know. They tend to source products a minimum of three months out – sometimes a year; the worst thing you can do is tell them you have 100,000 units ready to go but you're still working on the packaging.

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'Ensure that you are able to meet the airline's order requirements. We are used to wholesaling so it wasn't a problem for us, but if we'd had to manufacture products to order that would have been a long process.'

Barry Henken, Sier Disposables

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'Be patient. It can take years to secure a commitment because some companies work in contract agreements for several years. So, if you miss a tender, it can take 2-3 years to be able to pitch. This is a business you build step-by-step, year-by-year.'

Eric Carlier, Travel Retail Director





IS THE PRICE RIGHT?

Price is very sensitive and mainly driven by the fact that most big commercial, long-haul airlines still give away food and beverage as part of the package. That's why large suppliers offering very good deals for the mid- to long-term, are often the successful distributors. They have the marketing ability to significantly bring down their unit price.

Airlines are happy to communicate their price point parameters so ask pricing questions as early as possible in your discussions. Are they looking for a duty-free price or a tax and duty-free price? Are you expected to deliver the consignment, or will they collect it? If you're delivering, where to? Shipping products long distances is costly, but many airlines will collect.

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'Don't commit to a price you won't realistically be able to meet in the medium or longer-term. I've seen tenders recently in which airlines are asking for a price to be held for two years....there are currently a lot of pushbacks in the industry because the prices of ingredients and packaging are rising so quickly. Suppliers are having difficulty committing to large orders because they don't know if they're going to be able to get product at the right price, or at all.'

Kelly Stevenson

'Our bamboo toothbrush has a wavy handle, however, for airlines it's a bit large and they're looking for weight reduction and cost reduction. So we created a smaller, flat handle toothbrush, which has a more competitive production cost.'

**Joshua van den Hurk,
Founder of Bamboovement**

If you know your product is produced in China or New Zealand, do you know you can commit to delivering your stock to meet airline lead times? If you don't deliver, the airline will not come back. There are very few second chances.

If you win a tender, be honest. Stress your best possible price but ask for it to be reviewed after three months and again after six months, otherwise you will have to increase the price if you're expected to commit to two years. Don't negatively expose yourself to external market factors that could result in your business losing money – ultimately that won't help anyone because you're not going to be able to deliver.

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'Airline buyers are very aware of the current economic circumstances... they are also aware they have great brands and feel they can make cheeky requests – but don't let yourself be pressurised.'

Kelly Stevenson



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'For brands approaching the industry for the first time, I'd say simply be prepared and study the way airlines work – it's a huge potential market with very, very high volumes, but low margins. You must be aware of that.'

Alberto Topan,
SVP of Sales, The Perfect Cocktail



FORM Vs FORMAT

The size and format of your packaging is a vital consideration and nailing the right format will depend on whether you are selling onto a private jet, or into a First-Class, Business or Economy cabin. If it's a beverage you're selling, does it come in glass, plastic or aluminium? This is when understanding what an airline currently offers is important – i.e. mini bottles or full-size – they are unlikely to change just for you. And don't forget how your product will be stored onboard; a 250ml tall can doesn't fit upright in a standard cabin trolley drawer.

When it comes to volume products, such as bread rolls, waste – or avoiding it – will be a key consideration. An airline might not want to offer both white and wholemeal bread rolls because a large percentage of one will be wasted.

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'Airlines welcome suggestions but ensure you have a solution that fits with what they already have. If they are already stocking mini bottles of wine, you need to offer them your products in a mini, but you can ask if they've considered a can because it's better for the environment.'

Kelly Stevenson

SUSTAINABILITY COUNTS

Every airline has put Corporate Social Responsibility (CSR) at the heart of their strategies. From fuel efficiency to packaging, crew wellbeing to protecting supplier communities, airlines are addressing these key issues and expect suppliers to do likewise.

They will consider not just the packaging type, size and price point but also the fuel cost over time, and where the product is going, for instance landfill or recycling. Tell the buyer what your brand does to support the planet and/or the communities that make or grow your brand or its constituent parts/ingredients.

There is a really good example from a functional juices brand called Unrooted that exhibited at WTCE in 2022. Its juices are made from the fruit of wild, organic baobab trees and it collaborates closely with the communities that protect the trees and harvest the fruit.

If you are a B-Corp company, make this clear to airline buyers in your presentation. Of course, not being B-Corp is unlikely to be a deal breaker, but you will need to make it very clear how you are supporting the environment, communities or both. Sustainability is also important to passengers who note and judge product and packaging choices. For instance, British Airways replaced plastic cocktail swizzle sticks for paper ones. Aesthetically, the new sticks are not as appealing, but they are much more appreciated by passengers.

Weight is also a factor, with most airlines applying a fuel cost to every single onboard product – even tea bags. If you can offer a quality, lighter-weight solution to an onboard product at the right price, airline buyers are more likely to be prepared to listen to your pitch.

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'Don't feel you have to do everything. It's better to focus on doing fewer things well. If you're giving back to a community, you don't also need to plant trees. Crucially, be honest. No airline buyer is a pushover; most have got to their position because they know what they're doing...if you try to greenwash, they will see right through you.'

Kelly Stevenson

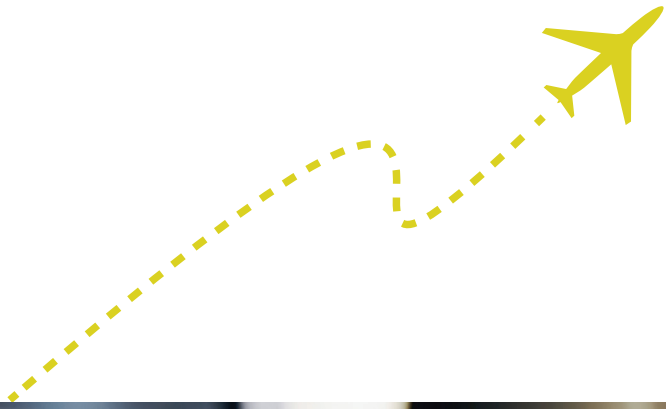
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'KLM looks for companies that have a strong sustainability story. Also local brands perform better with certain airlines than others. For us with KLM, I think it was a combination of the two. We focus a lot on sustainability - not just in the product, but also the carbon life cycle analysis. We also make sure the bamboo we use is FSC-certified. So taking that to the next level and then also together with the fact that we are a Dutch brand definitely helped open the door with KLM.'

**Joshua van den Hurk,
Founder of Bamboovement**

A TASTE FOR HEIGHTS

The lack of humidity and white noise in aeroplane cabins affects our sense of taste and smell. Demonstrate you understand and have thought about this before the buyer even samples your product, so they already believe you know what you're talking about. Explain the complexity of your food or beverage flavours and how those translate to being served at altitude.

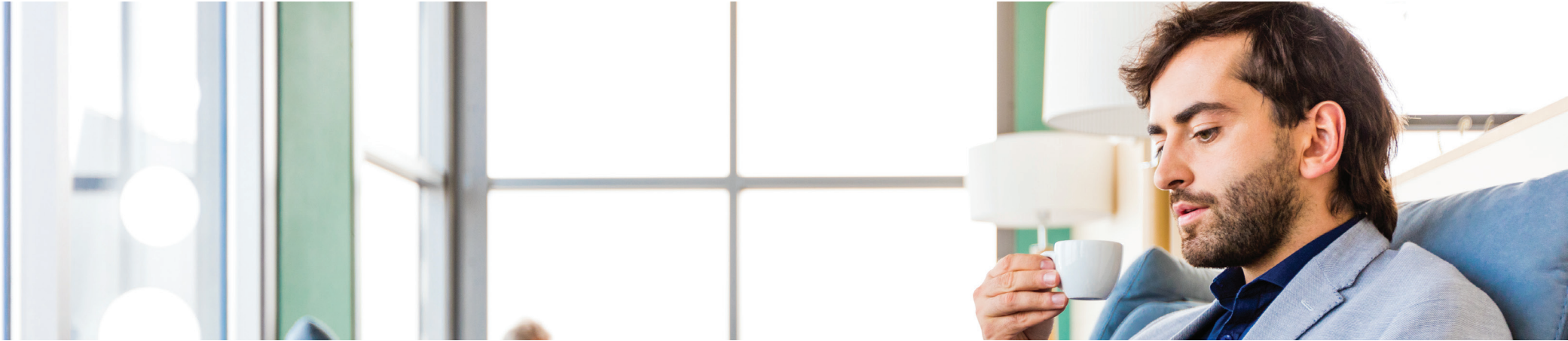


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'If you have a guava and mango juice, don't describe it as simply as that; instead say it's 'freshly squeezed to give it a mid-palette length before the guava flavours burst in to layer the taste experience.' Similarly with wine, you might say 'I'm not going to put forward a Pinot Grigio because it's too neutral for onboard, but I've got a wonderful Chardonnay with lots of oak.' You'll find it quite strong on the ground but at altitude it will mellow to perfection.'

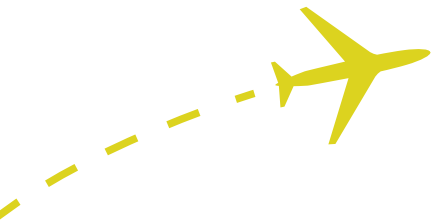
Kelly Stevenson





SPECIAL REQUIREMENTS

Onboard food and beverage requirements differ from airline to airline. Middle Eastern carriers, for instance, insist that all products are halal, which will mean there are strict requirements on front and back of pack labelling. Do your research into any special requirements before you pitch to specific airlines so that you don't waste their time or your own.



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'Special requirements are so important because it comes back to: do you have the right products for this particular buyer? You might have the most amazing juice in the most amazing bottle and a fabulous sustainability story...and you're prepared to come right down in price because you want this business so much....but is there a special requirement you haven't thought through?'

Kelly Stevenson

WTCE - A TRADE SHOW LIKE NO OTHER

Launched in 2012, the World Travel Catering & Onboard Services Expo (WTCE) is now the go-to for airline buyers looking to learn about the latest trends, find new products and collaborate with new brands.

Boasting over 850 onboard buyers in attendance at each show, A LOT of business happens because it's the event that buyers – and third parties, such as contract caterers – put it into their diaries to do just that. Buyers are often tricky to get hold of over the phone or on email, but you are guaranteed that the most important names across the onboard industry will be at WTCE each year.

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'WTCE is the Holy Grail of shows for an aviation food and drink buyer... An email or phone call – even a face-to-face - at another time of the year is just not the same. There are so many other distractions that could mean those conversations are lost or forgotten.'

Kelly Stevenson

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'WTCE is the event that brands know airline buyers will attend and they don't mind having those meetings. That's where the business gets done.'

Kelly Stevenson

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'Before my current position, I was travel retail and catering business director for another chocolate maker, Valrhona, so I made a lot of airline contacts all around the world. The best way to get in touch with them was, of course, directly but without WTCE that would have been difficult because there have been a lot of changes in airline staff and the management.'

**Eric Carlier, Travel Retail Director
at Saveurs & Nature**

HERE'S WHY AIRLINE BUYERS LOVE WTCE

- ✈ It's home to innovative product launches they won't see on rival airlines
- ✈ They're looking for brands they've seen advertised or those that have been in touch, but they've not had time to meet with at another time of the year
- ✈ They love to explore and discover new brands
- ✈ They're in the right frame of mind to be sold to

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'In 2017 we were starting to see ready-to-drink cocktails break through. I saw that category for the first time at WTCE and now it's huge. And I didn't know I was looking for RTD cocktails. Now in 2022, I've been working with a RTD cocktail company, and we've made airlines aware of it and sent out samples. At WTCE in June this year, some of those airlines were able to taste it on the stand...we had face-to-face conversations and really explored opportunities. Less than two weeks after WTCE, a major commercial airline listed it.'

Kelly Stevenson





HOW TO MAXIMISE YOUR TIME AND EXPERTISE AT WTCE

- ✈ Plan ahead. Buyers' show diaries get full very quickly; make appointments with key contacts as soon as you can. The WTCE Connect tool has been specifically designed to give exhibitors and buyers the opportunity to identify and schedule meetings with the right people at the show, making it easier for exhibitors to start conversations with buyers and for buyers to discover the businesses they are really keen to explore
- ✈ Make your stand eye-catching. Have everything on show to tell potential buyers about your product: samples are great, but also be very visual – show your sustainability story if you have one, where your products are made and who makes or grows them
- ✈ If you are developing something new, have samples or mock-ups, photography and details of when it will be available – but remember to be honest about timescales and when you can deliver

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'Be sure to contact everyone you meet immediately after WTCE. I've seen brands wait three or four weeks and by then you've been forgotten.'

Kelly Stevenson

KELLY STEVENSON'S TOP TIPS FOR SPEAKING TO AIRLINE BUYERS

- ✈️ If you sell products in different categories put space between them to make it very easy for each buyer to see and understand the product that is appropriate to them
- ✈️ If you meet a buyer responsible for one category, ask them who is most appropriate for your other product categories and ask them to introduce you. People are friends in this industry
- ✈️ Ask questions in a friendly way - don't bombard people
- ✈️ Be sure to tell buyers if other great brands already believe in your products, because even if they're not aviation related, that's significant
- ✈️ Talk about any relevant collaborations. For instance, if you have a very premium product and you've already done an experiential promotion in Fortnum & Mason or Harrods, that's something that could be replicated in the airport lounge and would be really interesting to many buyers
- ✈️ Some products just don't work inflight because of distribution, format/size or taste. But that same product might work well in the lounge network where there's huge potential because there is no space limit; it's a lovely environment to really show products off and create some amazing activations
- ✈️ Don't waste valuable time on peripheral people at WTCE. The rest of the year is perfect to get to know non-buyers who can give you context around the industry

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"Tell people about your successes: American carriers love to hear about successful products on EasyJet in the UK because that tells them the brand has not only hit a certain price point, so it has obviously understood what it needs to do to sell to an airline, but operationally it has already succeeded in a tough environment."

Kelly Stevenson

Special thanks to the following people for sharing their expertise and insights in this report:

Kelly Stevenson, Aviation & Travel Retail Consultant and Founder of JetVine

Barry Henken, International Sales & Buyer at Sier Disposables

Eric Carlier, Travel Retail Director at Saveurs & Nature

Joshua van den Hurk, Founder of Bamboovement

Alberto Topan, SVP of Sales, The Perfect Cocktail



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