



PRESS KIT

telepizza

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1. Telepizza

Telepizza is the leading Spanish multinational corporation and ranked fifth in the world for prepared food home delivery.

A pioneer in home delivery in Spain, we have established ourselves as the restaurant company with the largest number of points of sale and geographic coverage: currently, we are present in a dozen countries in Europe and South America, and only a few months ago we announced the start of activity in the Angolan and Russian markets.

With a market quote almost five times higher than the second most-representative brand in Spain, our company has more than 1,200 points of sale and 25,000 employees throughout the world.



telepizza

1. The Telepizza recipe

A global company

Present in more than a dozen countries, in Europe, Latin America, Asia and Africa, Telepizza continues to move forward with its international strategy in markets where it is still not present (a few Latin American countries and Central Europe, taking advantage of the 'hub' that is Poland), either directly or through its Master franchises, and continues to increase its presence in the locations where it is already working.

At the end of 2013, foreign sales accounted for 33% of the entire company.

Our network expansion formula

Telepizza bases its network model and national and international expansion on its own stores, franchises and Master franchises, the latter relying on the knowledge of our local partner.

Since 2000, the company has attached more importance to the franchise growth model and has dedicated resources and investment to the creation of an internal support structure for franchisees. Currently, the number of franchises in the Telepizza network has reached 789.

Since 2010, we've developed a new location format adapted to populations with less than 30,000 residents, allowing for greater expansion flexibility.

Innovation and Sales Channels

For a decade Telepizza has had an online sales channel in its own stores, which has been expanding throughout the network.

In addition to Telepizza.es, the company has created mobile sales apps for Smartphones, iPhones and Androids. In 2014, we launched three new native apps for iOS, Android and Firefox OS systems.

Currently, apps for mobile devices represent 14% of the sales for telepizza.es.

Innovation and Products

Year after year, Telepizza continues innovating its products, launching new pizzas and responding to market needs with competitive price policies without compromising quality, recipes for everyone (fresh dough, whole wheat dough and creamier cheese) and natural ingredients in line with the Mediterranean diet.

The logo for Telepizza, featuring the word "telepizza" in a red, lowercase, sans-serif font. A small green leaf is positioned above the letter 'i'.

1. Telepizza

Objectives

Telepizza wants to continue leading its industry.

Telepizza's vision is to offer excellent service at any time, in any place.

Our concrete mission is to be the very best company to work with and the very best at what we do, all the while sharing special moments with our customers.

To achieve all this, we've set ambitious goals for ourselves in different areas, which include:

- Finding the highest quality products, conducting a rigorous ingredient selection process, continually innovating and adapting to the peculiarities of each market.
- Modernise our identity and store image with a management model that is always focussed on the customer, as well as implementation of the latest technological advances for dough factories and logistical organisation.
- Offer on-demand products that cater to the consumers' tastes. Pizza, our main menu item, offers an ingredient composition very similar to the Mediterranean diet.

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2. Telepizza in figures

- 57% of the market share for pizza delivery in Spain.
- More than 56 million store visits.
- Present in 14 European, Latin American, Asian and African countries.
- More than 1,200 stores around the world, 630 located in Spain.
- 10.5 million pizzas sold through telepizza.es.
- More than 25.000 employees throughout the world.
- Telepizza has brand recognition of more than 98% in Spain.
- "Telepizza Room Service" is present in more than 700 major hotel chains in Spain.
- Successful implementation of a new store format adapted to populations of fewer than 30,000 in Spain.

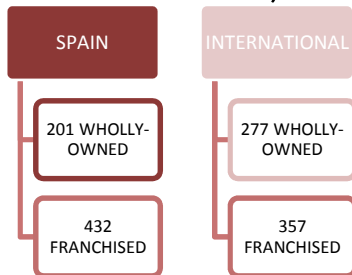
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3. Telepizza around the world

Telepizza has taken advantage of the growth of the home delivery food service industry in Spain and its international projection, allowing for an effective expansion strategy.



TELEPIZZA THROUGHOUT THE WORLD (1,267 ESTABLISHMENTS)



4. telepizza.es

- Telepizza has online sales channels in Spain, Portugal, Poland, Chile, Colombia, Peru and Ecuador.
- Telepizza.es has apps available for iOS (iPhone and iPad), Android and Firefox OS.
- The online channel represents 17% of total sales and 28% of home delivery sales, reaching 50% in some stores.
- Sales via mobile devices account for 7.5% of the company's total online activity.
- Telepizza has more than 1 million fans on social networks.
- According to the Twitter Engaged report from Izo consulting, Telepizza is the best company in the sector for Spanish food on Twitter.
- Moreover, we are top ranked in RSS feeds in the restaurant sector.
- We are also the most valued brand by young people in RSS feeds, according to Top Position consulting.



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5. History of the Telepizza Group

A global company

Telepizza is a multinational Spanish corporation, founded in 1987, becoming a leader in the prepared food home delivery sector in less than two decades.

Amongst our major milestones, which account for our business development and international expansion:

- In 1988, we opened our first store in Madrid and became a pioneer in home delivery in the Spanish pizza sector.
- Between 1992 and 1993, we set up our first dough production factory and began our international expansion strategy, opening stores in Poland, Portugal and Chile.
- Already in 1995, Telepizza had a 52% market share and, at the end of that year, had a total of 248 stores (204 in Spain and 44 abroad).
- In 1996, Telepizza became a listed company on the Spanish stock market and still maintains unstoppable growth. In that fiscal year, we had 287 stores: 236 in Spain and 51 abroad.
- Two years later, the company acquired the Luxtor cheese factory (Avila, Spain) and, in 1999, a new group of core shareholders became a part of our company.



5. History of the Telepizza Group

- At the turn of the century we defined new strategic lines of management for the company, which included revitalisation in the following areas: industrial, with the start of construction of a new dough factory and large logistics centre; and systemic: modernising with a new information management system in each one of our stores.
- In 2006, Telepizza continued with its customer approach strategy, regionalising our marketing strategy and adapting to the needs of each area.
- In 2009, we opened our first store in Dubai and finished the year with a total of 1,092 stores: 632 in Spain and 460 in international markets.
- Continuing our international expansion in June 2010, we acquired Jenò's, the first pizzeria chain in Colombia and principal Latino chain in Latin America.
- In August of that same year, Telepizza signed an agreement with Chinese group Christine, a leader in the baking and pastry sector in this country. This was a joint venture agreement, with both companies owning a 50% share.
- A year later, in June 2011, we established ourselves in Peru with the opening of our first location in that country and an ambitious expansion plan. Currently, Peru has 22 points of sale.
- In early 2013, Telepizza landed in the Ecuadorian market, after the acquisition of six PizzaExpress, a local chain, establishments. In October of 2013, our expansion continued in Panama, and a few months later, in 2014, in Bolivia.
- During 2014, the company has continued to explore markets with potential growth, and has arrived in Angola and Russia through Master franchise agreements.

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5. History of the Telepizza Group

Franchises as a business model

- Since 2000, Telepizza has attached more importance to the franchising model of growth, with the creation of a broad internal support structure and the ever-important profile adaptation for new social realities, including an ambitious global training plan for employees. To learn more about the market and our customers, we've promoted continued development for market studies dealing with trends in consumption and the creation of a new work methodology with a clearer focus on the consumer.
- Four years later, the company signed a master-franchise contract with the Campero Group for Guatemala.
- In September 2006, Telepizza had 329 franchised establishments, a trend that has since been steadily growing, in both the domestic and international markets.
- In 2009, the company closed the year with 600 franchises out of a total 1,092 brand establishments.
- In July 2010, Telepizza advanced its business model with the opening of its first location using a new format adapted to locations with less than 30,000 residents. This new store model provides greater flexibility for firm expansion, with smaller investments for local traditions.
- In 2013, Peru began its franchising activity: we opened our first franchised store in Arequipa; location number 21 in the Andean country.



5. History of the Telepizza Group

Innovation and Sales Channels

- 2003 was a before-and-after year for us in the Telepizza modernisation process: we began activity in our new industrial centre, tested the CRM system for "intelligent" customer relationship management and debuted a new brand image.
- A year later, the test of internet sales was finished and we began expanding Telepizza online at all of our wholly-owned stores in Spain. We didn't stop there: in 2005, this service was available in all of our chain establishments and in 76 franchisees.
- By the end of 2005, Telepizza offered customers the option to buy their products on-line at 325 establishments in Spain, making us the first operator in our sector to offer this type of service.
- That same year, "Telepizza Room Service" and its presence was strengthened: it is currently available in more than 700 hotels in Spain.
- In 2008 the company re-launched telepizza.es, offering customers the option to order pizza from home, quickly and easily.
- In 2009, more than 480 stores had the online order option.



5. History of the Telepizza Group

- From 2010 until present day, Telepizza has bolstered and encouraged the creation of new communication and sales channels with the customer. Besides the telepizza.es online store, the company has created sales mobile apps for Smartphones, iPhones and Androids. Our presence on social media is also growing.
- In 2011, the company introduced airline catering to the sector, incorporating its product in Air Europa routes. A year later, Iberia as well as Vueling joined this initiative. Since November 2014, we've also added airline sales to Norwegian Airlines (the third largest low cost airline in Europe, recently introduced in Spain).
- In 2013, Telepizza renewed its brand image, making it more modern, more approachable and more natural. We also reclaimed: "*The secret's in the dough.*"
- Telepizza began 2014 with the launch of three new native apps for the iOS, Android and Firefox operating systems. Now, apps for mobile devices represent 14% of the telepizza.es sales.



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5. History of the Telepizza Group

Innovation and Products

- Year after year, Telepizza continues to innovate its products: in 2005, we launched a new type of pizza, "Telepizza Stromboli", the first square and closed pizza with a new type of "bread dough" base. In 2006, we continued with our innovation policy and product launches using ingredients native to the Mediterranean diet. In 2009, we premiered individual salad, kebab and Mediterranean menus. In May, we included pasta and hamburgers in our menu. In February 2010, we expanded our product offering and launched the Roller Pizza and chicken hamburger. In April 2011, we wanted to hear more from our customers and launched the first pizza "cooked" by the social networks, the "Chicken Fan Barbacoa", after consulting our social media followers.
- In 2012 Telepizza maintained its commitment to innovation and continued adding new pizzas to its menu, presenting the "Top Sandwich", made from focaccia bread.
- In 2013, we included new whole-wheat dough in our menu and launched Pizza Natura, which includes arugula, cheese, grilled courgettes and chicken.
- In 2014 we launched a one-of-a-kind product, "pizzalada"; made from a pizza base, crispy bacon and covered in salad and chicken pops.



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6. The Mediterranean Diet

A Telepizza pizza is a dish that comes very close to meeting all of the Mediterranean diet's requirements:

- Olive oil, bread and tomato, components of this diet, are present in our pizzas.
- For preparation, we use natural and fresh ingredients, enhancing our products with vegetables: tomatoes, peppers, onions, etc...
- A Telepizza provides ample amounts of protein, carbohydrates and recommended fats, according to a balanced diet.

And there's even more:

- Telepizza menus incorporate cereals, vegetables, fruits and dairy products.
- Telepizza varieties are oven-cooked, one of the healthiest cooking methods with the fewest calories.



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7. Contact Information

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