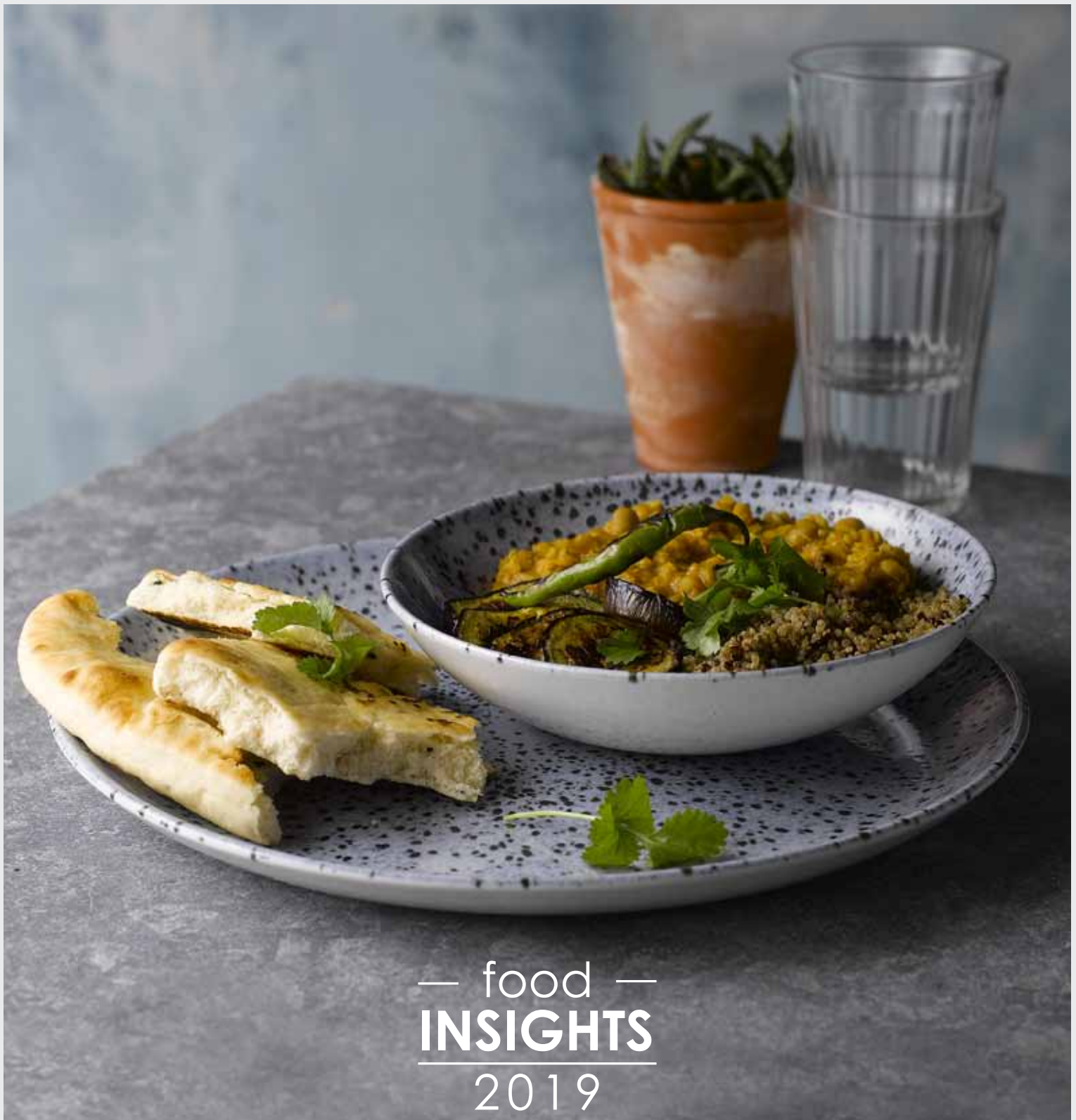




# CHURCHiLL

A SOCIAL INDUSTRY | SUSTAINABLE & CLEAN | ASIAN FUSIONS & BOWLS  
SPECIALITY HOT DRINKS | AFRICAN AROMAS | CASUAL, COMMUNAL DINING  
SPICED UP | LIVE FIRE COOKING | TABLETOP PALETTES



— food —  
**INSIGHTS**  
2019



# OUR RESEARCH JOURNEY AROUND THE WORLD...



In 2018 we travelled the world, experiencing and monitoring the food and restaurant trends in our core focus cities around the globe. These vibrant cities have innovative, independent restaurant scenes, buzzing with new ideas and experiences...

## ● SAN FRANCISCO

Boasting more restaurants per capita than any other city in the USA, San Fran is renowned for its avant garde restaurant scene.

## ● AUSTIN

Named the best city to live in the US for under 30's, the restaurant scene is young, vibrant and trendy. The residents of Austin like to buy local, buy fresh and buy eco friendly.

## ● NEW YORK CITY

With over 24,000 restaurants in Manhattan alone, the New York restaurant scene is ever changing and evolving. 75 of NYC's restaurants boast Michelin Stars, including 5 restaurants with 3 stars.

## ● LIMA

In 2018 3 of the best restaurants in the world were named in Lima, and the city continues to be a hub of culinary innovation.

## ● LONDON

London's buzzing multicultural community has made the city a hub of food diversity, innovations and fusions. With 71 (6 more than last year) Michelin starred restaurants and 5 of the best restaurants in the world.

## ● BRISTOL

Bristolians are fiercely independent, and therefore so is the restaurant scene. The city is a hive of quirky and innovative restaurants, bars, cafes and pubs.

## ● LEEDS

The booming northern city now has more restaurants in the city centre than ever before and the majority of these are independents or small groups.

## ● MADRID

Dubbed the food capital of Europe, attracting Michelin-Starred chefs and foodie tourists.

## ● BARCELONA

With a thriving tourist industry and vibrant eating out culture, amongst Barcelona's many astounding traditional restaurants there are innovative chefs experimenting with world flavours and fusions.

## ● BERLIN

A city on the pulse with food trends, from the world's street food to innovative fine dining fusions.

## ● SINGAPORE

After a strategic move to become a foodie destination Michelin visited Singapore for the first time in 2017, naming the first street food vendors to ever receive a coveted star.

## ● MELBOURNE

A vibrant city full of restaurants that set the trends for the rest of the world, Melbourne is hailed as the city that invented third wave coffee and the freak shake.

## WELCOME TO THE 2019 EDITION OF CHURCHILL'S FOOD AND RESTAURANT INSIGHTS MAGAZINE, WHERE WE SHOWCASE OUR RESEARCH INTO THE HOSPITALITY INDUSTRY.

As 2019 unfolds we will see more emphasis on sustainability in restaurants, as a society we start to examine the impact humans are having on the world. As a result we will start to see more vegetarian dining, and more sustainable sources of protein, such as insects and soy.

Diners become more aware of nutrition, choosing healthier options and seeking out foods attributed with health benefits.

Speciality coffee is going mainstream, with drinkers expecting high quality roasts and brews not only from independent artisan coffee shops but from high street brands, restaurants and hotels. The food we eat gets spicier as our palates get evermore adventurous, and this filters into the beverage industry with African flavours emerging on to the restaurant scene, as well as the continued growth on Indian and Middle Eastern flavours.

The Churchill Product Development Team

## FEATURES

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# Top Global Food Trends

We've monitored new openings across the world to identify and scale the biggest food styles in the hospitality industry today...

"The biggest food style in the hospitality industry is currently Asian Fusions & Bowls, followed by Italian and Healthy eating trends"

## 1. Asian Fusions

- Japanese, Korean, Vietnamese, Taiwanese and more...

## 2. Rustic Italian

- Wood fired pizza, antipasti and authentic handmade pasta

## 3. Conscious, Clean & Wild

- Healthy, sustainable, plant-based and pure lifestyles.

## 4. US SOUL FOOD

- Southern soul food, Barbecue, Tex-Mex and live fire cooking.

## 5. Tapas & Pintxos

- Social small plates, Spanish, relaxed & conversational, Catalan

## 6. Street Spice

- Spicy and fragrant Middle Eastern and Indian street food.

## 7. Latin Flavours

- Mexican tacos, South American grills and colourful Peruvian dishes.

## 8. Decadent Desserts

- Instagramable indulgence, sweet treats and bakeries.

## 9. Speciality Coffee

- Artisan brews go mainstream with barista quality coffee.

# Industry Themes

The industry is changing to meet the evolving wants, tastes and interests of diners, below discusses some of the key themes transforming how we dine.

## Entertaining experiences

The industry becomes experience driven with consumers seeking out the new, the customisable, the adventurous and the entertaining.

CHECK OUT...

**Zauo** in NYC, a Japanese restaurant where diners catch their own fish for dinner! Or **Swingers** in London where a street food style supper can be had after a round of crazy golf.



## Origins of Innovation

The industry is thriving with innovation and chefs can test out their concept before investing in permanent premises with street food trucks, supper clubs or pop ups.

CHECK OUT...

**Little Kolkata**, born from a London based supper club and now a permanent Covent Garden restaurant site.

**Daniel's Eatery** in Berlin, where he brings guests together to enjoy home cooking or cookery classes in his living room.



## Affordable Quality

Michelin trained chefs are working to make their food more accessible and affordable, with the mantra that great food should be for everyone.

CHECK OUT...

**Made Nice**, a new fast casual concept by the Eleven Madison Park team in NYC (named best restaurant in the world in 2017) where great quality food, made by a Michelin-Star team is made more accessible.



## Ingredients We'll See More Of in 2019...



**Charcoal & Squid Ink**  
The dark side of dining, chefs are using charcoal or seaweed to create a striking, gothic effect.



**Moringa** Hailed as the new matcha.



**Insects** There are over 2100 species of sustainable and high protein insects.



**Baharat & Berbere**  
African spices.



**Kombucha** A fermented tea drink with health attributes.



**Algae** Full of vitamins and an alternative protein source.





A Social Industry

#Colourful #Interactive #InstagramWorthy #Foodies #Instagrammable #Artofplating #WowFactor #nom

# A Social Industry

Social media has become a driving force in the restaurant industry, with the power to make or break a new restaurant concept.

Foodie lifestyles blogs, restaurants and hotel's social media feeds are no longer just a platform for sharing food images, they're now a tool that diners are using to choose where they eat. As a result restaurants and hotels are working hard to make their interiors and menus 'social media worthy' with colourful food, stylish tableware and interior storytelling.

Restaurants and hotels are prompting their customers to shout about their food and restaurants settings on social media with eye catching dishes, interesting tableware and striking interior features such as flower walls, murals, neon signs and more. Hashtag competitions that challenge diners to post the best pictures of a dish or cocktail or similar are proving a success for the industry.

Social media turns diners into instant advocates of an eatery, as they post their food and interior snaps on social media they are inadvertently recommending the restaurants or hotel to their friends and followers. Most restaurants want diners to post, hash tag and tweet about their dining experience, giving prompts to encourage user generated content (UGC), images or words created by customers which carry more weight and influence than direct advertising.

Instagram driven sweet treats have become a regular on menus and chefs getting creative with desserts such as ... Colourful is key and we see bright or pastel colours on the table from rainbow cake to edible glitter.



"Social Media turns diners into instant advocates"

## Instagrammable Food & Interiors...

### Check Out...

Sketch, London @sketchlondon

Elan Cafe, London @elan\_cafe

Joes Coffee, Austin @Joscoffee

Tacombi, NYC @tacombi

Banana's, Barcelona @bananasrestaurant

House of Small Wonder, Berlin @houseofsmallwonderberlin

### Follow Us...

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"The UK currently imports around 40% of its food. Switching from a diet based entirely on imports to a diet of food produced entirely in the UK reduces a person's food foot print by 57%" The Vegetarian Society

# SUSTAINABLE & CLEAN



**Sustainability is now a integral part of the hospitality industry, with a big focus on environmental and societal health and wellbeing.**

Consumers are more conscious than ever of the impact their lifestyles can have on the planet and society, so they seek out businesses that share their values and are willing to pay more for food, products and experiences that are eco-friendly, healthy and responsible.

## How is the industry becoming more sustainable?

### 1. Less Meat

Veganism can no longer be called a passing trend, vegetarians and flexitarians are on the rise and motivators such as 'Veganuary' and 'Meat-free Mondays' are now encouraging diners to try plant-based dishes. Non-vegetarian diets are said to have a greater impact on environmental resources, so eco-conscious consumers are reducing their intake of meat and processed foods.

### 2. Zero Waste

Single use plastics and waste reduction is a core focus for hospitality professionals as they strive to reduce environmental impact and save money.

### 3. Buy Local

We hear the phrase "food footprint" more and more, as food producers, retailers and the consumer begin to understand the environmental impact of over producing, excess processing and food miles.

### 4. Professional Wellbeing

Sustainability of the hospitality industry also means ensuring the wellbeing of the people who work in it, creating positive, rewarding working environments and allowing for a work-life balance. The industry is recognising the need to attract and retain talent and is working to make hospitality an appealing career choice.



Sustainable & Clean



**SUSTAINABILITY**  
Root to Stem **HEALTHY**  
**VEGAN** Zero Waste  
**Good Fat**  
**FARM TO TABLE**  
**Eco Friendly**  
**CLOSED LOOP COCKTAILS**  
**Vegetarian**  
Field to Fork **FLEXITARIAN**  
**CLEAN EATING**



## TRENDSETTERS

**EINS UNTER NULL - BERLIN**  
Michelin Star restaurant that focuses on purity and simplicity.

**TINY LEAF - LONDON**  
Zero waste, organic and vegetarian, located at the street food complex Mercato Metropolitano.

**BY CHLOE - USA & LONDON**  
Vegan fast casual concept with locally sourced ingredients.

**THE GREEN SPOT - BARCELONA**  
Healthy vegetarian dishes to wow meat eaters and non meat eaters.

**NOURISH CAFE - SAN FRANCISCO**  
Healthy and nourishing salads and smoothies.

**KITCHEN BY FOOD REBEL - SINGAPORE**  
Cafe opened by a health coach, specialising in buddha bowls.

**SIL0 - BRIGHTON**  
Zero waste restaurant with an ethos of respect for the environment, food production and nourishment

**GLORIA - NYC**  
Pescatarian restaurant with a strong focus on sustainability.

\*Some of the innovative sites we've spotted on our global food research trips, not necessarily Churchill customers, just inspiring and pacesetting restaurants...



# ASIAN FUSIONS & BOWLS

Diners are more adventurous than ever before, seeking out the flavours, experiences and ingredients that they experienced while travelling.

Our societies are multicultural and diverse, which means traditional family recipes from across the world are brought to restaurant tables. We see Korean, Japanese, Taiwanese and Vietnamese cuisines growing in popularity, and 2019 sees Chinese food making a comeback.

The restaurant industry continues to be influenced by Southeast Asian street food and the rise of the casual dining term 'bowl food' is now commonplace, with bowls become the choice vessels for noodles, healthy broths and nutritious salads.



"The largest and fastest growing food style in the independent restaurant sector"



## TRENDSETTERS

**RED FARM - NYC & LONDON**  
Modern & inventive Chinese food and dim sum.

**LONG CHIM - MELBOURNE**  
Inspired by the bustling Bangkok street kitchens.

**ATLAS KITCHEN - NYC**  
Contemporary and elevated Chinese food in a sleek restaurant setting.

**MONSIEUR SUSHITA - MADRID**  
Japanese with global fusions including Morocco, Peru, Thailand, France and Hawaii.

**SHACKFUYU - LONDON**  
Japanese style izakaya serving up small plates designed to share.

**BOWLS - LONDON**  
Dedicated to bowl food fusions from Asian, South America and the Caribbean.

**JINJUU - LONDON**  
Korean barbecue and street food, with influences from the US.

**KIN DEE - BERLIN**  
Innovative new twists on authentic Thai cuisine.



## Taste The Trend...

Vietnamese: **Pho** - Noodle soup made with healthy broth.

Korean: **Bibimbap** - Sizzling rice and vegetable dish served in a stone bowl.

Japanese: **Oden** - Hearty and warming hot pot with proteins and vegetables.

Taiwanese: **Gua Bao** - Steamed bun filled with pork belly

Thai: **Khao Soi** - Curried Noodle Soup

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# SPECIALITY Hot Drinks



**2019 is dubbed the year that speciality coffee goes mainstream, hitting the high street brands, hotel lobbies and restaurants.**

Consumers have become coffee connoisseurs and the industry is growing with artisan roasters and qualified barristers in stylish coffee shops. Now we see tea as a speciality and crafted beverage, from loose leaf tea blends served in cafes to tea cocktails served in restaurants and bars as an alternative to alcohol.

Top quality coffee is no longer reserved for trendy, independent coffee shops and this year we start to see restaurants focusing on making their coffee as good as their food. Sustainability is also a consideration as compostable capsules and tea bags go mainstream, and we hear phrases like 'bean to cup' as consumers ask 'what's in my cup?'

## TRENDSETTERS

### GOOD AND PROPER TEA, LONDON

Pioneers of loose leaf tea selling retail or from their tea truck and tea shop in Clerkenwell.

### TEA ROOM AT BUNHOUSE, LONDON

A cocktail bar specialising in tea cocktails, hidden beneath Bun House in Soho.

### TOMA CAFE, MADRID

The first cafe in Madrid to roast their own beans, Toma now have two locations.

### WORKSHOP COFFEE, LONDON

Coffee shops with a focus on bean to cup.

### TRIPLE ROAST AT ELEMENTS CAFE, BRISTOL

In house roastery at Elements where coffee drinkers are encouraged to learn about the roasting process.

### THE BARN, BERLIN

Third wave coffee in the gallery district.

### MAMECHA, BERLIN

Japanese tea shop specialising in green tea varieties.

### BLANK SLATE TEA, NYC

Contemporary tea bar serving artisan hot and ice tea blends.

\*Some of the innovative sites we've spotted on our global food research trips, not necessarily Churchill customers, just inspiring and pacesetting restaurants...



machiato	3.75
americano	3.25
latte	4
mocha dark or white	4.50
chai spicy or sweet	4.50
cafe au lait	3
hot chocolate	3.25
loose leaf tea	3.75



Speciality Hot Drinks



# AFRICAN AROMAS

From Ethiopia to Ghana and Senegal, Nigeria to Mali and Morocco, food from Africa is on track to be the next big emerging food trend.



Growing in prominence in London, African flavours are likely to go global in the coming year. Spicy, vibrant dishes from across the African continent include one pots such as tangy chicken yassa or jollof rice.

Cuisine from Nigeria and Senegal have become ones to watch, from independent African restaurants to the dishes that are appearing on mainstream menus.

Africa is a big continent so the food is diverse, core ingredients include rice, plantain, chicken, tomatoes, watermelon, onions, nutmeg, ginger and cumin.



**FUN FACT:** The most eaten food in Africa is watermelon

## Taste The Trend...

**Jollof Rice:** A simple dish, prepared in one pot with ingredients such as rice, pepper, onions, and tomatoes.

**Bunny Chow:** A hollowed out half loaf filled with a spicy curry.



## TRENDSETTERS

### IKOYI - LONDON

Elevated and innovative East African flavours at St. James' Market

### ZOE'S GHANA KITCHEN - LONDON

From Zoe Adjonyoh who's grown from supper clubs to being a driving force in the African food movement.

### FES - BERLIN

Turkish barbecue with a added Asian twist.

### HENRY NOMAD - NYC

Contemporary Pan-African cuisine in NoMad.

### LEMLEM KITCHEN - LONDON

Inspired by Asmara, the capital of Eritrea where the cuisine is a blend of African, Middle Eastern and Italian flavours.

### KUDU - LONDON

African roots and local suppliers at this South African restaurant in Peckham.

### ISLA VIDA - SAN FRANCISCO

A fusion of African and Caribbean flavours.

### SOUK KITCHEN - BRISTOL

Middle Eastern and Mediterranean restaurants in Clifton and Southville.

\*Some of the innovative sites we've spotted on our global food research trips, not necessarily Churchill customers, just inspiring and pace setting restaurants...



# CASUAL, COMMUNAL DINING



Street food markets and food halls are relaxed, casual and fun places to try new flavours.

The way we are dining out is changing, with more support for independent restaurants, adventurous tastes and willingness to share dishes. We see this with the rise of the independent restaurant, the growth in street food style concepts and in menus designed for sharing.

This casual style of dining isn't going away, with so more food halls and courts opening, where diners sit at communal trestle tables and can choose from a variety of cuisines all under one roof. **Mercato metropolitano** in London, **Koszki** in Warsaw and **Mercado de San Ildefonso** in Madrid provide culinary variety and innovation in vibrant, bustling atmospheres.

## Watch Out For...

- A Food Hall opening in the old Pascha Nightclub in London.
- Mackie Mayor- Already has two sites in Manchester, set to open a third UK site 2019.
- 'Le Food Society' in Paris is set to be the biggest food hall in Europe, opening in 2020 and spanning 5000 sq metres.
- Mercado Little Spain opening New York's Hudson Yards, covering an area of 35,000 square feet and extending both indoors and outdoors.



Casual & Communal

**SOCIABLE**  
Local FUN  
Community Hubs  
**RELAXED**  
Authentic Street Food  
**BUSTLING**  
Theatrical Kitchens  
**ATMOSPHERIC**





# SPICED UP

Today's diners like it hot so our menus are getting spicier with more world flavours and lesser known exotic spices.



## TRENDSETTERS

### GUN POWDER - LONDON

Hugely popular Indian fare in Spitalfields now with a second London site at Tower Bridge.

### BABA-BOOM - LONDON

A blend of Middle Eastern spices with fresh British produce, top quality meat and veggie alternatives on Persian flat breads.

### SHOO SHOO - NYC

Israeli dishes served in a restaurant inspired by Tel Aviv's bohemian cafe culture.

### BUNDOBUST - LEEDS & MANCHESTER

Popular Indian street food and craft beer.

### BOMBAY CAFE BUNTYS - BERLIN

Fresh, contemporary Indian cuisine in Charlottenburg.

### MALA PROJECT - NYC

Dedicated to the bold, spicy flavours of Sichuan cuisine.

### THE GOOD EGG - LONDON

Israeli inspired small plates with a in situ bakery and pitta oven.

### MASALA 75 - BARCELONA

A contemporary curry house and street food truck.

\*Some of the innovative sites we've spotted on our global food research trips, not necessarily Churchill customers, just inspiring and pace setting restaurants...

Dishes on mainstream menus are getting hotter, with chefs experimenting with international spices such as those from Africa, India, Mexico and Southeast Asia.

The trend gains strength with spices such as turmeric and cumin being credited with health benefits, claiming to reduce inflammation and boost the immune system. Herbs such as sage are said to improve brain function and cinnamon is believed to lower blood pressure.

Our taste buds continue to like it hot so we will see more international spice blends on menus. Spices also make their way into unusual food items, look out for chile-infused ice cream, chocolate, popcorn and more.



Spiced Up

## TASTE IT...

**Berberere** - Ethiopia

**Szechuan** - China

**Habanera** - Mexico

**Chipotle** - Mexico

**Za'atar** - Iran

**Sumac** - Mexico

**Ras El Hanout** - Morocco

**Harrissa** - North Africa

**Baharat** - Tunisia

**Wasabi** - Japan





# LIVE FIRE Cooking

The process of cooking over fire is not reserved for US style barbecue, all manner of international cuisines are being cooked over the naked flame.



Chef's are harnessing the power of smoke and fire, reminding diners that cooking over fire is not only reserved for American style barbecue. We see restaurants inspired by the low and slow smoke houses of the US southern states, but also the meats cooked over fire at Asian street food markets, Jamaican jerk flavours and souk inspired middle eastern meats.

A back to basics approach to dining, chefs and diners are embracing the primitive act of cooking over fire. Instead of gas fired ovens kitchens are being installed with pit style barbecues, wood fired ovens, braai stoves and even cauldrons hanging over coals.



Live Fire Cooking

"Restaurant Cauldron in Bristol, UK has gone as far as to reject gas completely in the kitchen, instead all food is cooked using a wood fired oven, coal powered stove, a 60 litre cauldron and a yakatori grill."

## TRENDSETTERS

### SOM SAA, LONDON

Thai street food cooked over a large open pitt grill in Shoreditch.

### DONS BOGAM BLACK, NYC

Korean BBQ with high tech bbq carts that wheel to the table.

### HAMMER & TONGS, LONDON

Real South African live fire cooking from a custom built braai stove in Clerkenwell.

### THE PITT, BERLIN

Meats cooked for 18 hours over real oak wood.

### SMOKESTAK, LONDON

This Shoreditch restaurant is hailed by many as the best barbecue restaurant in London.

### CAULDRON, BRISTOL

Zero gas restaurant that uses a wood fired stove and cauldron.

### JIMBO, MADRID

Authentic Texan smokehouse and craft beer bar.

### G2 KOREAN BBQ, MELBOURNE

Cook your own Korean barbecue on table top stoves.

\*Some of the innovative sites we've spotted on our global food research trips, not necessarily Churchill customers, just inspiring and pace setting restaurants...

Smokehouse **FLAME**  
**GRILL** FIRE **LICKED**  
 Street Food **BARBECUE** Meatless  
**Souk Style** LOW N SLOW



# Tabletop Palettes

Design and colour trends are influenced by the moods and attitudes of society and as hospitality interiors transform to reflect this, our tableware evolves with them.

As the hospitality industry continues to move towards experience driven concepts, chefs, management, buyers and designers seek out products and tableware to complement, enhance and enrich the dining experience.

Tableware becomes an element of the overall design of the interior, a part of the customer experience and essential to enhance the style of food presentation. Eclectic and varied combinations of tabletop designs create unique styles and different looks.

Defiant and bold attitudes are expressed through striking blacks and raw, dramatic patterns. Neutral, soft tones create a simplistic and calming palette.

Environmental awareness is the core topic of the moment and we see more natural greens and blues used in design as society begins working towards reversing the damage we have inflicted on the planet.

Bold yellows and browns in mix with dusky Teals and Blues creating a contemporary and experimental take on Mid Century style.

#### Product Solutions:

**Rebellious:** Stonecast - Patina Iron Black & Antique Copper. Studio Prints - Mineral in Blue, Raku Quartz Black, Stone Quartz Black. Art de Cuisine - Igneous in Black.

**Simplicity:** Stonecast - Nutmeg & Barley White, Patina Antique Taupe. Studio Prints - Fluid in Pearl Grey, Raku in Jade Green, Topaz Blue and Agate Grey, Stone in Agate Grey.

**Blue Planet:** Stonecast - Blueberry, Patina in Iron Black, Aqueous in Bayou. Studio Prints - Fluid in Pearl Grey, Raku in Jade Green, Topaz Blue, Mineral in Blue, Stone in Aquamarine.

**Botanical:** Stonecast - Samphire Green, Patina in Burnished Green and Rustic Teal. Studio Prints - Raku in Jade Green.

**Retro:** Stonecast - Mustard Seed and Blueberry, Patina in Rustic Teal and Vintage Copper. Studio Prints - Stone in Zircon Brown and Agate Grey.



## Rebellious

Cultural Hijacking  
Protesting  
Shout Out Loud  
Defiance  
Bold and Brave



## Simplicity

SERENITY  
Calm Neutrals  
Minimalism  
Soft Organics  
Traquility



## Blue Planet

Blue Depth  
FLUID TEXTURES  
CALMING  
Wild Natural  
W a t e r s



## Botanical

TROPICAL  
Shades of Green  
Florals & Foliage  
PURE & FRESH  
NATURAL



## Retro Chic

Modernism  
Experimentation  
Minimalism  
Sixties & Seventies  
Geometrics





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