

## Food Delivery: Eight Models

| Model                                   | Description  | Example   | Dine-In Option?                        | Where is the cooking done?                  | Who delivers?                   | Who has the data? |
|---|--|---|--|---|---------------------------------|-------------------|
| <b>Independent – OneShot</b>            | Traditional model: physical restaurant that also offers a delivery service on the side   | Pizzeria in the neighbourhood                               | Yes                                    | Restaurant                                  | Restaurant                      | Restaurant        |
| <b>Cloud Kitchen – Hub &amp; Spoke</b>  | Central hub, several branches<br>Half-finished goods delivered from hub to branches for completion   | Domino's  | Yes                                    | Half-finished at hub, completed at branches | Restaurant                      | Restaurant        |
| <b>Ghost Kitchen</b>                    | Delivery only<br>No physical restaurant, specialised delivery kitchens in peripheral locations   | Green Summit Group  | No                                     | Off-site commissary kitchen                 | ODP                             | Restaurant        |
| <b>Virtual Restaurant</b>               | Delivery-only Meals are cooked for virtual on-line restaurant brands in existing restaurant kitchens   | SushiYaa with Bento Box, Poke Station, Mando Dumpling House | No                                     | Existing restaurants                        | Uber Eats                       | Uber Eats         |
| <b>Aggregator ODP – No Driver Fleet</b> | ODP lists all available menus in an app, handles coordination and delivery (no own driver fleet, independent drivers using their own cars)           | Uber Eats   | No (some restaurants yes, but not ODP) | Restaurants, off-site commissary kitchen    | ODP                             | ODP               |
| <b>Consolidator – Bulk Drop System</b>  | Pre-ordering of meals, delivery to pre-arranged drop-off points, no "last mile"  | Yun Ban Bao   | No (some restaurants yes, but not ODP) | Restaurants, off-site commissary kitchen    | ODP/Consolidator                | ODP/Consolidator  |
| <b>Aggregator ODP – Owned Fleet</b>     | ODP lists all available menus in an app, handles coordination and delivery (with its own fleet)  | Just Eat, Deliveroo   | No (some restaurants yes, but not ODP) | Restaurants, off-site commissary kitchen    | ODP (Special case: restaurants) | ODP               |
| <b>Aggregator ODP – Dark Kitchen</b>    | ODPs rent out kitchen space at logistically beneficial locations to the restaurants. ODP lists menus in an app and handles coordination and delivery | Deliveroo with RooBox, DoorDash, Postmates                  | No                                     | Off-site commissary kitchen                 | ODP                             | ODP               |

Figure 27, source: GDI Research, 2019