


**TECHNOMIC**

# 2011/2012 U.S. Foodservice Industry

## Food, Alcoholic & Non-Alcoholic Beverages and Non-Foods

Segment	2011 Retail Sales Equivalent		2011 Operator Purchases		2011 Manufacturer Shipments		Potential Contact Points 2011	Nominal Growth		Real Growth	
	(\$ Billions)	(Share)	(\$ Billions)	(Share)	(\$ Billions)	(Share)		2011 <sup>R</sup>	2012 <sup>F</sup>	2011 <sup>R</sup>	2012 <sup>F</sup>
<b>Total Restaurants and Bars</b>	<b>\$395.861</b>	<b>66.0%</b>	<b>\$127.106</b>	<b>58.2%</b>	<b>\$110.608</b>	<b>58.4%</b>	<b>593,130</b>	<b>2.5%</b>	<b>2.8%</b>	<b>0.0%</b>	<b>0.3%</b>
Limited Service Restaurants	197.722	32.9	66.057	30.3	59.441	31.4	306,500	2.5	3.0	0.0	0.5
Full Service Restaurants	179.044	29.8	56.344	25.8	47.062	24.9	243,130	2.5	2.5	0.0	0.0
Bars and Taverns	19.095	3.2	4.705	2.2	4.105	2.2	43,500	1.0	2.0	(1.5)	(0.5)
<b>Total Beyond Restaurants</b>	<b>\$204.230</b>	<b>34.0%</b>	<b>\$91.239</b>	<b>41.8%</b>	<b>\$78.700</b>	<b>41.6%</b>	<b>440,993</b>	<b>2.6%</b>	<b>2.9%</b>	<b>0.3%</b>	<b>0.5%</b>
<b>Retail Hosts</b>	<b>\$36.275</b>	<b>6.0%</b>	<b>\$18.867</b>	<b>8.6%</b>	<b>\$16.849</b>	<b>8.9%</b>	<b>193,994</b>	<b>2.6%</b>	<b>3.2%</b>	<b>0.1%</b>	<b>0.7%</b>
Supermarket Foodservice	19.421	3.2	11.373	5.2	10.237	5.4	42,294	3.5	4.0	1.0	1.5
Convenience Stores	10.501	1.7	4.847	2.2	4.361	2.3	133,800	0.4	1.5	(2.0)	(1.0)
All Other Retailers	6.353	1.1	2.648	1.2	2.252	1.2	17,900	3.5	3.5	1.0	1.0
<b>Travel &amp; Leisure</b>	<b>\$60.613</b>	<b>10.1%</b>	<b>\$19.194</b>	<b>8.8%</b>	<b>\$16.163</b>	<b>8.5%</b>	<b>85,439</b>	<b>3.4%</b>	<b>3.0%</b>	<b>0.9%</b>	<b>0.5%</b>
Recreation	20.409	3.4	6.845	3.1	5.702	3.0	32,819	0.4	0.4	(2.0)	(2.0)
Lodging	34.434	5.7	10.168	4.7	8.499	4.5	47,329	5.1	4.5	2.5	2.0
Transportation	5.770	1.0	2.181	1.0	1.962	1.0	5,291	3.5	2.5	1.0	0.0
<b>Business &amp; Industry</b>	<b>\$13.330</b>	<b>2.2%</b>	<b>\$7.207</b>	<b>3.3%</b>	<b>\$6.126</b>	<b>3.2%</b>	<b>9,885</b>	<b>1.0%</b>	<b>1.5%</b>	<b>-1.5%</b>	<b>-1.0%</b>
<b>Education</b>	<b>\$31.882</b>	<b>5.3%</b>	<b>\$16.649</b>	<b>7.6%</b>	<b>\$14.635</b>	<b>7.7%</b>	<b>20,838</b>	<b>3.3%</b>	<b>3.1%</b>	<b>1.7%</b>	<b>1.4%</b>
Primary/Secondary Schools*	17.635	2.9	9.638	4.4	8.674	4.6	16,364	2.0	2.0	1.0	1.0
Colleges/Universities	14.247	2.4	7.012	3.2	5.961	3.1	4,474	5.1	4.5	2.5	2.0
<b>Healthcare</b>	<b>\$22.437</b>	<b>3.7%</b>	<b>\$11.373</b>	<b>5.2%</b>	<b>\$9.649</b>	<b>5.1%</b>	<b>82,206</b>	<b>2.9%</b>	<b>3.4%</b>	<b>0.4%</b>	<b>0.8%</b>
Hospitals	10.572	1.8	4.868	2.2	4.280	2.3	5,795	5.1	5.1	2.5	2.5
Long-Term Care	6.470	1.1	3.482	1.6	2.871	1.5	55,261	(1.0)	0.4	(3.4)	(2.0)
Senior Living	5.395	0.9	3.023	1.4	2.497	1.3	21,150	3.5	3.5	1.0	1.0
<b>All Other</b>	<b>\$39.693</b>	<b>6.6%</b>	<b>\$17.949</b>	<b>8.2%</b>	<b>\$15.279</b>	<b>8.1%</b>	<b>48,631</b>	<b>1.2%</b>	<b>2.2%</b>	<b>-1.1%</b>	<b>-0.2%</b>
Vending/Office Coffee Service	20.868	3.5	9.553	4.4	7.881	4.2	8,500	(0.1)	1.5	(2.5)	(1.0)
Caterers	6.050	1.0	2.071	0.9	1.716	0.9	10,759	4.5	4.5	2.0	2.0
Military*	3.669	0.6	2.052	0.9	1.847	1.0	466	2.0	2.0	1.0	1.0
Corrections*	4.074	0.7	2.240	1.0	2.016	1.1	4,651	(0.5)	0.0	(1.5)	(1.0)
Other Segments	5.031	0.8	2.033	0.9	1.818	1.0	24,255	2.5	2.5	0.0	0.0
<b>TOTAL FOODSERVICE</b>	<b>\$600.091</b>	<b>100.0%</b>	<b>\$218.345</b>	<b>100.0%</b>	<b>\$189.308</b>	<b>100.0%</b>	<b>1,034,123</b>	<b>2.5%</b>	<b>2.8%</b>	<b>0.1%</b>	<b>0.3%</b>

Source: Technomic, Inc.

() = Decline. <sup>R</sup> = revised. <sup>F</sup> = forecast.

Note: Nominal growth assumes menu price inflation rate of 2.5% for both 2011 and 2012. Numbers may not add due to rounding. Forecasts and numbers subject to change. Data may not be comparable to previous editions of this chart due to redefinitions, resegmentation, and revisions.

\*Segment uses special "government" inflation rate of 1% for 2011 and 2012.

Note: The data shown does not reflect the impact of changes in portion sizes and/or sales mix.


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# 2011/2012 U.S. Foodservice Industry

## Food and Non-Alcoholic Beverages Only

Segment	2011 Retail Sales Equivalent		2011 Operator Purchases		2011 Manufacturer Shipments		Potential Contact Points 2011	Nominal Growth		Real Growth	
	(\$ Billions)	(Share)	(\$ Billions)	(Share)	(\$ Billions)	(Share)		2011 <sup>R</sup>	2012 <sup>F</sup>	2011 <sup>R</sup>	2012 <sup>F</sup>
<b>Total Restaurants and Bars</b>	<b>\$352.113</b>	<b>64.9%</b>	<b>\$101.847</b>	<b>56.7%</b>	<b>\$88.416</b>	<b>56.9%</b>	<b>593,130</b>	<b>2.5%</b>	<b>2.8%</b>	<b>0.0%</b>	<b>0.3%</b>
Limited Service Restaurants	197.023	36.3	55.167	30.7	49.650	31.9	306,500	2.5	3.0	0.0	0.5
Full Service Restaurants	152.020	28.0	45.606	25.4	37.853	24.4	243,130	2.5	2.5	0.0	0.0
Bars and Taverns	3.070	0.6	1.074	0.6	0.913	0.6	43,500	1.0	2.0	(1.5)	(0.5)
<b>Total Beyond Restaurants</b>	<b>\$190.422</b>	<b>35.1%</b>	<b>\$77.798</b>	<b>43.3%</b>	<b>\$66.994</b>	<b>43.1%</b>	<b>440,993</b>	<b>2.6%</b>	<b>2.9%</b>	<b>0.3%</b>	<b>0.5%</b>
<b>Retail Hosts</b>	<b>\$36.068</b>	<b>6.6%</b>	<b>\$15.244</b>	<b>8.5%</b>	<b>\$13.596</b>	<b>8.7%</b>	<b>193,994</b>	<b>2.6%</b>	<b>3.2%</b>	<b>0.1%</b>	<b>0.7%</b>
Supermarket Foodservice	19.402	3.6	9.119	5.1	8.207	5.3	42,294	3.5	4.0	1.0	1.5
Convenience Stores	10.443	1.9	3.655	2.0	3.290	2.1	133,800	0.4	1.5	(2.0)	(1.0)
All Other Retailers	6.222	1.1	2.470	1.4	2.100	1.4	17,900	3.5	3.5	1.0	1.0
<b>Travel &amp; Leisure</b>	<b>\$49.603</b>	<b>9.1%</b>	<b>\$15.111</b>	<b>8.4%</b>	<b>\$12.653</b>	<b>8.1%</b>	<b>85,439</b>	<b>3.4%</b>	<b>3.0%</b>	<b>0.9%</b>	<b>0.5%</b>
Recreation	15.828	2.9	4.683	2.6	3.864	2.5	32,819	0.4	0.4	(2.0)	(2.0)
Lodging	28.413	5.2	8.508	4.7	7.062	4.5	47,329	5.1	4.5	2.5	2.0
Transportation	5.361	1.0	1.919	1.1	1.727	1.1	5,291	3.5	2.5	1.0	0.0
<b>Business &amp; Industry</b>	<b>\$13.330</b>	<b>2.5%</b>	<b>\$5.999</b>	<b>3.3%</b>	<b>\$5.099</b>	<b>3.3%</b>	<b>9,885</b>	<b>1.0%</b>	<b>1.5%</b>	<b>-1.5%</b>	<b>-1.0%</b>
<b>Education</b>	<b>\$31.637</b>	<b>5.8%</b>	<b>\$14.909</b>	<b>8.3%</b>	<b>\$13.113</b>	<b>8.4%</b>	<b>20,838</b>	<b>3.3%</b>	<b>3.1%</b>	<b>1.7%</b>	<b>1.4%</b>
Primary/Secondary Schools*	17.635	3.3	8.818	4.9	7.936	5.1	16,364	2.0	2.0	1.0	1.0
Colleges/Universities	14.002	2.6	6.091	3.4	5.177	3.3	4,474	5.1	4.5	2.5	2.0
<b>Healthcare</b>	<b>\$22.339</b>	<b>4.1%</b>	<b>\$10.112</b>	<b>5.6%</b>	<b>\$8.575</b>	<b>5.5%</b>	<b>82,206</b>	<b>2.9%</b>	<b>3.4%</b>	<b>0.4%</b>	<b>0.8%</b>
Hospitals	10.572	1.9	4.229	2.4	3.721	2.4	5,795	5.1	5.1	2.5	2.5
Long-Term Care	6.470	1.2	3.235	1.8	2.669	1.7	55,261	(1.0)	0.4	(3.4)	(2.0)
Senior Living	5.298	1.0	2.649	1.5	2.185	1.4	21,150	3.5	3.5	1.0	1.0
<b>All Other</b>	<b>\$37.445</b>	<b>6.9%</b>	<b>\$16.424</b>	<b>9.1%</b>	<b>\$13.957</b>	<b>9.0%</b>	<b>48,631</b>	<b>1.2%</b>	<b>2.2%</b>	<b>-1.1%</b>	<b>-0.2%</b>
Vending/Office Coffee Service	20.868	3.8	9.391	5.2	7.747	5.0	8,500	(0.1)	1.5	(2.5)	(1.0)
Caterers	5.707	1.1	1.598	0.9	1.318	0.8	10,759	4.5	4.5	2.0	2.0
Military*	3.669	0.7	1.835	1.0	1.651	1.1	466	2.0	2.0	1.0	1.0
Corrections*	4.074	0.8	2.037	1.1	1.833	1.2	4,651	(0.5)	0.0	(1.5)	(1.0)
Other Segments	3.126	0.6	1.563	0.9	1.407	0.9	24,255	2.5	2.5	0.0	0.0
<b>TOTAL FOODSERVICE</b>	<b>\$542.535</b>	<b>100.0%</b>	<b>\$179.645</b>	<b>100.0%</b>	<b>\$155.410</b>	<b>100.0%</b>	<b>1,034,123</b>	<b>2.5%</b>	<b>2.8%</b>	<b>0.1%</b>	<b>0.3%</b>

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