


TECHNOMIC

2010/2011 U.S. Foodservice Industry

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

Segment	2010 Retail Sales Equivalent		2010 Operator Purchases		2010 Manufacturer Shipments		Potential Contact Points 2010	Nominal Growth		Real Growth	
	(\$ Billions)	(Share)	(\$ Billions)	(Share)	(\$ Billions)	(Share)		2010 ^R	2011 ^F	2010 ^R	2011 ^F
Total Restaurants and Bars	\$385.523	66.0%	\$123.881	58.2%	\$107.761	58.4%	592,083	0.1%	1.6%	-1.4%	-0.4%
Limited Service Restaurants	191.089	32.7	63.846	30.0	57.451	31.2	311,283	1.0	2.0	(0.5)	0.0
Full Service Restaurants	175.207	30.0	55.192	25.9	46.092	25.0	242,800	(1.0)	1.0	(2.5)	(1.0)
Bars and Taverns	19.227	3.3	4.843	2.3	4.217	2.3	38,000	1.5	2.5	0.0	0.5
Total Beyond Restaurants	\$198.487	34.0%	\$88.857	41.8%	\$76.643	41.6%	442,960	0.7%	2.0%	-0.7%	0.0%
Retail Hosts	\$35.322	6.0%	\$18.375	8.6%	\$16.415	8.9%	194,300	1.7%	2.7%	0.2%	0.7%
Supermarket Foodservice	18.983	3.3	11.092	5.2	9.983	5.4	42,000	3.0	3.5	1.5	1.5
Convenience Stores	10.454	1.8	4.825	2.3	4.341	2.4	133,800	0.0	1.5	(1.5)	(0.5)
All Other Retailers	5.885	1.0	2.458	1.2	2.091	1.1	18,500	0.5	2.0	(1.0)	0.0
Travel & Leisure	\$58.391	10.0%	\$18.518	8.7%	\$15.593	8.5%	85,275	3.1%	2.3%	1.5%	0.3%
Recreation	20.318	3.5	6.814	3.2	5.676	3.1	32,984	(2.6)	(0.0)	(4.0)	(2.0)
Lodging	32.500	5.6	9.597	4.5	8.022	4.4	47,000	6.6	3.5	5.0	1.5
Transportation	5.573	1.0	2.107	1.0	1.895	1.0	5,291	3.5	3.0	2.0	1.0
Business & Industry	\$12.866	2.2%	\$6.956	3.3%	\$5.912	3.2%	9,985	-4.6%	0.0%	-6.0%	-2.0%
Education	\$30.848	5.3%	\$16.122	7.6%	\$14.177	7.7%	21,334	2.6%	3.0%	1.1%	1.0%
Primary/Secondary Schools	17.288	3.0	9.448	4.4	8.503	4.6	16,925	2.0	2.6	0.5	0.6
Colleges/Universities	13.560	2.3	6.674	3.1	5.674	3.1	4,409	3.5	3.5	2.0	1.5
Healthcare	\$21.973	3.8%	\$11.159	5.2%	\$9.459	5.1%	82,547	2.2%	2.6%	0.7%	0.6%
Hospitals	10.063	1.7	4.634	2.2	4.074	2.2	5,903	2.0	2.5	0.5	0.5
Long-Term Care	6.699	1.1	3.605	1.7	2.973	1.6	55,539	1.5	2.0	0.0	0.0
Senior Living	5.211	0.9	2.920	1.4	2.412	1.3	21,105	3.5	3.5	2.0	1.5
All Other	\$39.087	6.7%	\$17.728	8.3%	\$15.086	8.2%	49,519	-3.8%	0.2%	-5.2%	-1.8%
Vending/Office Coffee Service	20.881	3.6	9.559	4.5	7.886	4.3	9,000	(5.1)	(0.6)	(6.5)	(2.5)
Caterers	5.605	1.0	1.923	0.9	1.589	0.9	10,226	(4.6)	(0.0)	(6.0)	(2.0)
Military	3.597	0.6	2.012	0.9	1.811	1.0	466	3.5	3.0	2.0	1.0
Corrections	4.095	0.7	2.252	1.1	2.026	1.1	5,327	(2.0)	0.5	(3.4)	(1.5)
Other Segments	4.908	0.8	1.984	0.9	1.774	1.0	24,500	(1.5)	2.0	(3.0)	0.0
TOTAL FOODSERVICE	\$584.010	100.0%	\$212.738	100.0%	\$184.404	100.0%	1,035,043	0.3%	1.7%	-1.2%	-0.3%

Source: Technomic, Inc.

() = Decline. ^R = revised. ^F = forecast.

Note: Nominal growth assumes menu price inflation rate of 1.5% for 2010 and 2.0% for 2011. 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.

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


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2010/2011 U.S. Foodservice Industry

Food and Non-Alcoholic Beverages Only

Segment	2010 Retail Sales Equivalent		2010 Operator Purchases		2010 Manufacturer Shipments		Potential Contact Points 2010	Nominal Growth		Real Growth	
	(\$ Billions)	(Share)	(\$ Billions)	(Share)	(\$ Billions)	(Share)		2010 ^R	2011 ^F	2010 ^R	2011 ^F
Total Restaurants and Bars	\$343.766	65.0%	\$99.517	56.8%	\$86.358	57.0%	592,083	0.1%	1.6%	-1.4%	-0.4%
Limited Service Restaurants	190.405	36.0	53.313	30.4	47.982	31.6	311,283	1.0	2.0	(0.5)	0.0
Full Service Restaurants	149.455	28.3	44.837	25.6	37.214	24.5	242,800	(1.0)	1.0	(2.5)	(1.0)
Bars and Taverns	3.906	0.7	1.367	0.8	1.162	0.8	38,000	1.5	2.5	0.0	0.5
Total Beyond Restaurants	\$185.144	35.0%	\$75.799	43.2%	\$65.274	43.0%	442,960	0.7%	2.0%	-0.7%	0.0%
Retail Hosts	\$35.126	6.6%	\$14.841	8.5%	\$13.243	8.7%	194,300	1.7%	2.7%	0.2%	0.7%
Supermarket Foodservice	18.967	3.6	8.915	5.1	8.023	5.3	42,000	3.0	3.5	1.5	1.5
Convenience Stores	10.396	2.0	3.639	2.1	3.275	2.2	133,800	0.0	1.5	(1.5)	(0.5)
All Other Retailers	5.763	1.1	2.288	1.3	1.945	1.3	18,500	0.5	2.0	(1.0)	0.0
Travel & Leisure	\$47.754	9.0%	\$14.547	8.3%	\$12.180	8.0%	85,275	3.1%	2.3%	1.5%	0.3%
Recreation	15.757	3.0	4.662	2.7	3.846	2.5	32,984	(2.6)	(0.0)	(4.0)	(2.0)
Lodging	26.818	5.1	8.031	4.6	6.665	4.4	47,000	6.6	3.5	5.0	1.5
Transportation	5.179	1.0	1.854	1.1	1.669	1.1	5,291	3.5	3.0	2.0	1.0
Business & Industry	\$12.866	2.4%	\$5.790	3.3%	\$4.921	3.2%	9,985	-4.6%	0.0%	-6.0%	-2.0%
Education	\$30.615	5.8%	\$14.441	8.2%	\$12.707	8.4%	21,334	2.6%	3.0%	1.1%	1.0%
Primary/Secondary Schools	17.288	3.3	8.644	4.9	7.780	5.1	16,925	2.0	2.6	0.5	0.6
Colleges/Universities	13.327	2.5	5.797	3.3	4.928	3.2	4,409	3.5	3.5	2.0	1.5
Healthcare	\$21.879	4.1%	\$9.933	5.7%	\$8.416	5.6%	82,547	2.2%	2.6%	0.7%	0.6%
Hospitals	10.063	1.9	4.025	2.3	3.542	2.3	5,903	2.0	2.5	0.5	0.5
Long-Term Care	6.699	1.3	3.349	1.9	2.763	1.8	55,539	1.5	2.0	0.0	0.0
Senior Living	5.117	1.0	2.559	1.5	2.111	1.4	21,105	3.5	3.5	2.0	1.5
All Other	\$36.904	7.0%	\$16.246	9.3%	\$13.806	9.1%	49,519	-3.8%	0.2%	-5.2%	-1.8%
Vending/Office Coffee Service	20.881	3.9	9.397	5.4	7.752	5.1	9,000	(5.1)	(0.6)	(6.5)	(2.5)
Caterers	5.281	1.0	1.479	0.8	1.220	0.8	10,226	(4.6)	(0.0)	(6.0)	(2.0)
Military	3.597	0.7	1.799	1.0	1.619	1.1	466	3.5	3.0	2.0	1.0
Corrections	4.095	0.8	2.048	1.2	1.843	1.2	5,327	(2.0)	0.5	(3.4)	(1.5)
Other Segments	3.050	0.6	1.525	0.9	1.373	0.9	24,500	(1.5)	2.0	(3.0)	0.0
TOTAL FOODSERVICE	\$528.911	100.0%	\$175.316	100.0%	\$151.632	100.0%	1,035,043	0.3%	1.7%	-1.2%	-0.3%

Source: Technomic, Inc.

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