


TECHNOMIC

2009/2010 U.S. Foodservice Industry

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

Segment	2009 Retail Sales Equivalent		2009 Operator Purchases		2009 Manufacturer Shipments		Potential Contact Points 2009	Nominal Growth		Real Growth	
	(\$ Billions)	(Share)	(\$ Billions)	(Share)	(\$ Billions)	(Share)		2009 ^R	2010 ^F	2009 ^R	2010 ^F
Total Restaurants and Bars	\$404.187	68.7%	\$126.585	60.1%	\$110.341	60.4%	596,170	-3.5%	-0.8%	-5.8%	-2.3%
Limited Service Restaurants	189.398	32.2	63.356	30.1	57.011	31.2	310,755	0.0	1.5	(2.4)	0.0
Full Service Restaurants	165.667	28.2	52.021	24.7	43.495	23.8	246,500	(8.0)	(4.1)	(10.2)	(5.5)
Bars and Taverns	49.122	8.3	11.207	5.3	9.835	5.4	38,915	0.0	0.0	(2.4)	(1.5)
Total Beyond Restaurants	\$184.278	31.3%	\$83.988	39.9%	\$72.434	39.6%	436,203	-4.4%	-0.7%	-6.7%	-2.1%
Retail Hosts	\$34.713	5.9%	\$18.046	8.6%	16.124	8.8%	210,800	1.3%	2.2%	-1.2%	0.7%
Supermarket Foodservice	18.698	3.2	10.870	5.2	9.784	5.4	34,850	4.5	3.5	2.0	2.0
Convenience Stores	10.454	1.8	4.825	2.3	4.341	2.4	133,950	1.5	1.5	(1.0)	0.0
All Other Retailers	5.561	0.9	2.351	1.1	1.999	1.1	42,000	(8.5)	(1.0)	(10.7)	(2.5)
Travel & Leisure	\$53.602	9.1%	\$17.024	8.1%	\$14.298	7.8%	82,423	-11.3%	-4.9%	-13.4%	-6.3%
Recreation	19.832	3.4	6.599	3.1	5.515	3.0	35,400	(10.0)	(4.1)	(12.2)	(5.5)
Lodging	31.197	5.3	9.212	4.4	7.700	4.2	47,000	(12.0)	(5.6)	(14.1)	(7.0)
Airlines	2.574	0.4	1.212	0.6	1.083	0.6	23	(10.0)	0.0	(12.2)	(1.5)
Business & Industry	\$13.486	2.3%	\$7.291	3.5%	\$6.197	3.4%	10,510	-10.0%	-2.6%	-12.2%	-4.0%
Education	\$30.051	5.1%	\$15.711	7.5%	\$13.818	7.6%	21,067	3.2%	2.4%	0.7%	0.9%
Primary/Secondary Schools	16.949	2.9	9.262	4.4	8.336	4.6	16,650	3.0	2.0	0.5	0.5
Colleges/Universities	13.102	2.2	6.448	3.1	5.482	3.0	4,417	3.5	3.0	1.0	1.5
Healthcare	\$21.452	3.6%	\$10.894	5.2%	\$9.234	5.1%	67,385	1.7%	2.0%	-0.8%	0.5%
Hospitals	9.817	1.7	4.521	2.1	3.975	2.2	5,700	1.0	1.5	(1.5)	0.0
Long-Term Care	6.600	1.1	3.552	1.7	2.929	1.6	42,635	1.5	1.5	(1.0)	0.0
Senior Living	5.035	0.9	2.821	1.3	2.330	1.3	19,050	3.5	3.5	1.0	2.0
All Other	\$30.974	5.3%	\$15.022	7.1%	\$12.761	7.0%	44,018	-8.4%	-2.3%	-10.7%	-3.7%
Vending/Office Coffee Service	22.004	3.7	10.072	4.8	8.310	4.5	8,225	(12.0)	(3.6)	(14.1)	(5.0)
Military	3.475	0.6	1.944	0.9	1.749	1.0	466	3.0	3.5	0.5	2.0
Corrections	4.179	0.7	2.298	1.1	2.068	1.1	5,327	1.0	(0.5)	(1.5)	(2.0)
Other Segments	1.316	0.2	0.709	0.3	0.635	0.3	30,000	0.0	(0.5)	(2.4)	(2.0)
TOTAL FOODSERVICE	\$588.465	100.0%	\$210.572	100.0%	\$182.775	100.0%	1,032,373	-3.8%	-0.8%	-6.1%	-2.3%

Source: Technomic, Inc.

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

Note: Nominal growth assumes inflation rate of 2.5% for 2009 and 1.5% for 2010. 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 inclusion of alcohol and non-foods, as well as 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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2009/2010 U.S. Foodservice Industry

Food and Non-Alcoholic Beverages Only

Segment	2009 Retail Sales Equivalent		2009 Operator Purchases		2009 Manufacturer Shipments		Potential Contact Points 2009	Nominal Growth		Real Growth	
	(\$ Billions)	(Share)	(\$ Billions)	(Share)	(\$ Billions)	(Share)		2009 ^R	2010 ^F	2009 ^R	2010 ^F
Total Restaurants and Bars	\$328.305	65.7%	\$94.820	57.1%	\$82.427	57.3%	596,170	-3.5%	-0.8%	-5.8%	-2.3%
Limited Service Restaurants	189.309	37.9	53.007	31.9	47.706	33.2	310,755	0.0	1.5	(2.4)	0.0
Full Service Restaurants	136.712	27.4	41.014	24.7	34.041	23.7	246,500	(8.0)	(4.1)	(10.2)	(5.5)
Bars and Taverns	2.284	0.5	0.799	0.5	0.679	0.5	38,915	0.0	0.0	(2.4)	(1.5)
Total Beyond Restaurants	\$171.525	34.3%	\$71.237	42.9%	\$61.317	42.7%	436,203	-4.4%	-0.7%	-6.7%	-2.1%
Retail Hosts	\$34.544	6.9%	\$14.582	8.8%	\$13.013	9.1%	210,800	1.3%	2.2%	-1.2%	0.7%
Supermarket Foodservice	18.587	3.7	8.736	5.3	7.862	5.5	34,850	4.5	3.5	2.0	2.0
Convenience Stores	10.396	2.1	3.639	2.2	3.275	2.3	133,950	1.5	1.5	(1.0)	0.0
All Other Retailers	5.560	1.1	2.207	1.3	1.876	1.3	42,000	(8.5)	(1.0)	(10.7)	(2.5)
Travel & Leisure	\$41.335	8.3%	\$12.425	7.5%	\$10.334	7.2%	82,423	-11.3%	-4.9%	-13.4%	-6.3%
Recreation	13.936	2.8	4.123	2.5	3.402	2.4	35,400	(10.0)	(4.1)	(12.2)	(5.5)
Lodging	25.743	5.2	7.709	4.6	6.398	4.5	47,000	(12.0)	(5.6)	(14.1)	(7.0)
Airlines	1.656	0.3	0.593	0.4	0.534	0.4	23	(10.0)	0.0	(12.2)	(1.5)
Business & Industry	\$13.486	2.7%	\$6.069	3.7%	\$5.159	3.6%	10,510	-10.0%	-2.6%	-12.2%	-4.0%
Education	\$29.825	6.0%	\$14.076	8.5%	\$12.388	8.6%	21,067	3.2%	2.4%	0.7%	0.9%
Primary/Secondary Schools	16.949	3.4	8.474	5.1	7.627	5.3	16,650	3.0	2.0	0.5	0.5
Colleges/Universities	12.876	2.6	5.601	3.4	4.761	3.3	4,417	3.5	3.0	1.0	1.5
Healthcare	\$21.361	4.3%	\$9.699	5.8%	\$8.217	5.7%	67,385	1.7%	2.0%	-0.8%	0.5%
Hospitals	9.817	2.0	3.927	2.4	3.456	2.4	5,700	1.0	1.5	(1.5)	0.0
Long-Term Care	6.600	1.3	3.300	2.0	2.722	1.9	42,635	1.5	1.5	(1.0)	0.0
Senior Living	4.944	1.0	2.472	1.5	2.039	1.4	19,050	3.5	3.5	1.0	2.0
All Other	\$30.974	6.2%	\$14.387	8.7%	\$12.205	8.5%	44,018	-8.4%	-2.3%	-10.7%	-3.7%
Vending/Office Coffee Service	22.004	4.4	9.902	6.0	8.169	5.7	8,225	(12.0)	(3.6)	(14.1)	(5.0)
Military	3.475	0.7	1.738	1.0	1.564	1.1	466	3.0	3.5	0.5	2.0
Corrections	4.179	0.8	2.089	1.3	1.880	1.3	5,327	1.0	(0.5)	(1.5)	(2.0)
Other Segments	1.316	0.3	0.658	0.4	0.592	0.4	30,000	0.0	(0.5)	(2.4)	(2.0)
TOTAL FOODSERVICE	\$499.830	100.0%	\$166.057	100.0%	\$143.743	100.0%	1,032,373	-3.8%	-0.8%	-6.1%	-2.3%

Source: Technomic, Inc.

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