


TECHNOMIC

2008/2009 U.S. Foodservice Industry

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

Segment	2008 Retail Sales Equivalent		2008 Operator Purchases		2008 Manufacturer Shipments		Potential Contact Points 2008	Nominal Growth		Real Growth	
	(\$ Billions)	(Share)	(\$ Billions)	(Share)	(\$ Billions)	(Share)		2008 ^R	2009 ^F	2008 ^R	2009 ^F
Total Restaurants and Bars	\$415.812	68.7%	\$130.209	60.2%	\$113.307	60.3%	610,885	0.0%	-2.6%	-4.3%	-5.0%
Limited Service Restaurants	187.194	30.9	62.445	28.9	56.191	29.9	311,140	2.0	0.0	(2.4)	(2.4)
Full Service Restaurants	180.963	29.9	56.883	26.3	47.568	25.3	260,580	(2.5)	(6.0)	(6.7)	(8.3)
Bars and Taverns	47.655	7.9	10.881	5.0	9.548	5.1	39,165	3.5	1.5	(1.0)	(1.0)
Total Beyond Restaurants	\$189.505	31.3%	\$86.194	39.8%	\$74.533	39.7%	437,245	0.8%	-1.5%	-3.5%	-3.9%
Retail Hosts	\$32.055	5.3%	\$16.690	7.7%	\$14.930	7.9%	212,750	4.0%	1.8%	-0.4%	-0.7%
Supermarket Foodservice	17.572	2.9	10.144	4.7	9.130	4.9	34,800	6.0	4.0	1.4	1.5
Convenience Stores	10.298	1.7	4.728	2.2	4.254	2.3	135,300	2.5	(0.5)	(1.9)	(2.9)
All Other Retailers	4.185	0.7	1.818	0.8	1.546	0.8	42,650	0.0	(1.5)	(4.3)	(3.9)
Travel & Leisure	\$58.655	9.7%	\$19.270	8.9%	\$16.147	8.6%	82,260	-1.7%	-5.1%	-5.9%	-7.4%
Recreation	22.119	3.7	7.368	3.4	6.158	3.3	36,100	(1.0)	(3.0)	(5.3)	(5.4)
Lodging	33.493	5.5	10.432	4.8	8.676	4.6	46,137	(1.0)	(6.0)	(5.3)	(8.3)
Airlines	3.043	0.5	1.471	0.7	1.313	0.7	23	(15.0)	(10.0)	(18.7)	(12.2)
Business & Industry	\$14.985	2.5%	\$8.147	3.8%	\$6.925	3.7%	10,725	-3.0%	-5.0%	-7.2%	-7.3%
Education	\$28.896	4.8%	\$15.105	7.0%	\$13.287	7.1%	20,800	4.9%	3.0%	0.4%	0.5%
Primary/Secondary Schools	16.455	2.7	8.962	4.1	8.066	4.3	16,650	4.5	3.0	0.0	0.5
Colleges/Universities	12.441	2.1	6.144	2.8	5.222	2.8	4,150	5.5	3.0	1.0	0.5
Healthcare	\$21.082	3.5%	\$10.664	4.9%	\$9.042	4.8%	67,235	3.2%	1.1%	-1.2%	-1.4%
Hospitals	9.720	1.6	4.461	2.1	3.923	2.1	5,730	2.8	0.6	(1.6)	(1.9)
Long-Term Care	6.586	1.1	3.514	1.6	2.898	1.5	42,635	1.8	0.0	(2.6)	(2.4)
Senior Living	4.777	0.8	2.689	1.2	2.221	1.2	18,870	6.0	3.5	1.4	1.0
All Other	\$33.832	5.6%	\$16.317	7.5%	\$14.203	7.6%	43,475	-1.9%	-3.6%	-6.1%	-6.0%
Vending/Office Coffee Service	25.004	4.1	11.452	5.3	9.448	5.0	8,480	(3.0)	(5.0)	(7.2)	(7.3)
Military	3.374	0.6	1.888	0.9	1.699	0.9	425	0.0	(0.5)	(4.3)	(2.9)
Corrections	4.138	0.7	2.269	1.0	2.042	1.1	4,570	3.0	1.0	(1.4)	(1.5)
Other Segments	1.316	0.2	0.708	0.3	1.013	0.5	30,000	1.0	0.0	(3.3)	(2.4)
TOTAL FOODSERVICE	\$605.317	100.0%	\$216.403	100.0%	\$187.840	100.0%	1,048,130	0.3%	-2.2%	-4.1%	-4.6%

Source: Technomic, Inc.

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

Note: Nominal growth assumes inflation rate of 4.5% for 2008 and 2.5% for 2009. 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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2008/2009 U.S. Foodservice Industry

Food and Non-Alcoholic Beverages Only

Segment	2008 Retail Sales Equivalent		2008 Operator Purchases		2008 Manufacturer Shipments		Potential Contact Points 2008	Nominal Growth		Real Growth	
	(\$ Billions)	(Share)	(\$ Billions)	(Share)	(\$ Billions)	(Share)		2008 ^R	2009 ^F	2008 ^R	2009 ^F
Total Restaurants and Bars	\$337.992	65.8%	\$97.770	57.3%	\$84.832	57.5%	610,885	0.0%	-2.6%	-4.3%	-5.0%
Limited Service Restaurants	187.108	36.4	52.390	30.7	47.151	32.0	311,140	2.0	0.0	(2.4)	(2.4)
Full Service Restaurants	148.600	28.9	44.580	26.1	37.001	25.1	260,580	(2.5)	(6.0)	(6.7)	(8.3)
Bars and Taverns	2.284	0.4	0.799	0.5	0.679	0.5	39,165	3.5	1.5	(1.0)	(1.0)
Total Beyond Restaurants	\$175.471	34.2%	\$72.991	42.7%	\$62.659	42.5%	437,245	0.8%	-1.5%	-3.5%	-3.9%
Retail Hosts	\$31.898	6.2%	\$13.458	7.9%	\$12.029	8.2%	212,750	4.0%	1.8%	-0.4%	-0.7%
Supermarket Foodservice	17.472	3.4	8.212	4.8	7.390	5.0	34,800	6.0	4.0	1.4	1.5
Convenience Stores	10.243	2.0	3.585	2.1	3.226	2.2	135,300	2.5	(0.5)	(1.9)	(2.9)
All Other Retailers	4.184	0.8	1.661	1.0	1.412	1.0	42,650	0.0	(1.5)	(4.3)	(3.9)
Travel & Leisure	\$44.860	8.7%	\$13.958	8.2%	\$11.565	7.8%	82,260	-1.7%	-5.1%	-5.9%	-7.4%
Recreation	15.484	3.0	4.582	2.7	3.780	2.6	36,100	(1.0)	(3.0)	(5.3)	(5.4)
Lodging	27.536	5.4	8.718	5.1	7.192	4.9	46,137	(1.0)	(6.0)	(5.3)	(8.3)
Airlines	1.840	0.4	0.659	0.4	0.593	0.4	23	(15.0)	(10.0)	(18.7)	(12.2)
Business & Industry	\$14.985	2.9%	\$6.743	3.9%	\$5.732	3.9%	10,725	-3.0%	-5.0%	-7.2%	-7.3%
Education	\$28.896	5.6%	\$13.640	8.0%	\$12.005	8.1%	20,800	4.9%	3.0%	0.4%	0.5%
Primary/Secondary Schools	16.455	3.2	8.228	4.8	7.405	5.0	16,650	4.5	3.0	0.0	0.5
Colleges/Universities	12.441	2.4	5.412	3.2	4.600	3.1	4,150	5.5	3.0	1.0	0.5
Healthcare	\$20.999	4.1%	\$9.528	5.6%	\$8.074	5.5%	67,235	3.2%	1.1%	-1.2%	-1.4%
Hospitals	9.720	1.9	3.888	2.3	3.421	2.3	5,730	2.8	0.6	(1.6)	(1.9)
Long-Term Care	6.502	1.3	3.251	1.9	2.682	1.8	42,635	1.8	0.0	(2.6)	(2.4)
Senior Living	4.777	0.9	2.388	1.4	1.971	1.3	18,870	6.0	3.5	1.4	1.0
All Other	\$33.832	6.6%	\$15.666	9.2%	\$13.255	9.0%	43,475	-1.9%	-3.6%	-6.1%	-6.0%
Vending/Office Coffee Service	25.004	4.9	11.252	6.6	9.283	6.3	8,480	(3.0)	(5.0)	(7.2)	(7.3)
Military	3.374	0.7	1.687	1.0	1.518	1.0	425	0.0	(0.5)	(4.3)	(2.9)
Corrections	4.138	0.8	2.069	1.2	1.862	1.3	4,570	3.0	1.0	(1.4)	(1.5)
Other Segments	1.316	0.3	0.658	0.4	0.592	0.4	30,000	1.0	0.0	(3.3)	(2.4)
TOTAL FOODSERVICE	\$513.463	100.0%	\$170.761	100.0%	\$147.492	100.0%	1,048,130	0.3%	-2.2%	-4.1%	-4.6%

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