

A Datamonitor Interactive Model

# Global Foodservice Markets Database 2004-2009

## Sales Estimates of 25 Foodservice Channels and 100+ Product Categories in 40 Countries

Published: Dec-04 Product Code: IMCM0137

***Use this report to...***

*Understand the current and future  
product and channel opportunities  
presented by one of the fastest  
growing sectors of the food industry*

# Introduction

This database provides estimates of the size of the foodservice market – segmented by major distribution channels and by food and drink product categories – for 40 countries around the world. Together with Datamonitor's Interactive Consumer Database, it provides the complete view of product category sales that is so often missing from marketers' perspectives.

There are two ways of looking at the foodservice, by channel sales, and by product sales. This database gives you both. The channel sales data is based on a detailed review of secondary research sources such as national statistics offices and the trade press. The product sales data is based on our own in-house benchmarks and estimates.

## Country coverage

The database provides information on 40 countries.

- Argentina
- Australia
- Austria
- Belgium
- Brazil
- Canada
- Chile
- China
- Columbia
- Czech Republic
- Denmark
- Finland
- France
- Germany
- Greece
- Hong Kong
- Hungary
- India
- Indonesia
- Ireland
- Italy
- Japan
- Mexico
- Netherlands
- New Zealand
- Norway
- Philippines
- Poland
- Portugal
- Russia
- Singapore
- South Korea
- Spain
- Sweden
- Switzerland
- Taiwan
- Thailand
- UK
- US
- Venezuela

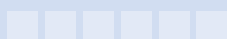
## Distribution channel coverage and segmentation

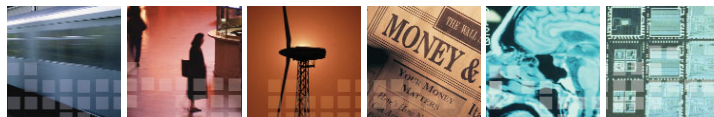
The database contains sales value data (at operator buying prices) for the following **profit sector** channels:

- Cafés
- Pubs and bars
- Nightclubs
- Restaurants
  - Full Service Restaurants (FSR)
  - Quick Service Restaurants (QSR, also known as "fast food")
- Takeaways (main activity)
- Hotels and lodging
- Street and mobile vendors
- Retail
- Leisure
- On-board
  - Air
  - Rail
  - Sea
  - Coach

And for the following **cost sector** channels:

- Education
  - Primary and secondary
  - Tertiary
- Hospitals
- Welfare and services
  - Armed services
  - Residential care
  - Welfare meals
  - Detention
  - Other
- Workplace
  - Industrial
  - Retail, financial and office-based
  - Other





## Category coverage and segmentation

The database provides sales value data (again at operator buying prices) for both food and drinks product categories. Specifically, it offers value data on the following food categories.

Beer, Cider and FABs	Beer	(40 countries)		Cream	(39)
	Cider and perry	(20)		Fromage frais	(28)
	FABs	(28)		Milk	(40)
Spirits				Yogurt	(40)
	Brandy	(40 countries)	Dried food	Dessert mixes	(28 countries)
	Gin and genever	(40)		Dried soup	(35)
	Liqueurs	(40)		Dried pasta	(39)
	Rum	(40)		Dried ready meals	(35)
	Specialty spirits	(34)		Rice	(39)
	Tequila and mezcal	(39)			
Vodka	(40)	Frozen food		Frozen bakery products	(30 countries)
Whisk(e)y	(40)		Frozen desserts	(28)	
			Frozen fish/seafood	(30)	
			Frozen fruit	(27)	
			Frozen meat products	(30)	
			Frozen pizza	(40)	
			Frozen potato products	(40)	
Wine	Fortified wine	(40 countries)		Frozen ready meals	(40)
	Sparkling wine	(40)		Frozen vegetables	(32)
	Still wine	(40)			
	Vermouth	(39)			
Hot drinks	Coffee	(40 countries)	Ice cream	Artisanal	(39 countries)
	Tea	(40)		Frozen yogurt	(30)
	Other hot drinks	(37)		Impulse	(40)
Soft drinks				Take-home	(40)
	Bottled water	(40 countries)	Oils and fats	Oils	(40 countries)
	Carbonates	(40)		Solid fats	(39)
	Concentrates	(36)		Spreadable fats	(40)
	Functional drinks	(39)			
	Juices	(40)			
RTD tea and coffee	(38)				
Bakery and cereals	Bread and rolls	(40 countries)	Sauces, dressings and condiments	Dry cooking sauces	(39 countries)
	Breakfast cereals	(40)		Condiment sauces	(38)
	Cakes and pastries	(40)		Dips	(17)
	Cereal bars	(21)		Dressings	(40)
	Cookies (sweet biscuits)	(40)		Pickled products	(25)
	Crackers (savory biscuits)	(40)		Seasonings	(17)
	Morning goods	(40)		Table sauces	(40)
		Wet cooking sauces	(39)		
Canned food	Canned desserts	(30 countries)	Savory snacks	Nuts and seeds	(40 countries)
	Canned fish/seafood	(40)		Popcorn	(34)
	Canned fruit	(40)		Potato chips	(40)
	Canned meat products	(38)		Processed snacks	(40)
	Canned pasta and noodles	(32)		Other savory snacks	(40)
	Canned ready meals	(36)			
	Canned soup	(38)			
Canned vegetables	(40)				
Chilled food	Chilled bakery	(21 countries)	Sweet and savory spreads	Chocolate spreads	(35 countries)
	Chilled fish/seafood	(31)		Nut-based spreads	(18)
	Chilled fresh pasta	(34)		Jam/jelly/marmalade	(39)
	Chilled meat products	(39)	Savory spreads	(39)	
	Chilled pizza	(30)	Honey	(35)	
	Chilled ready meals	(29)	Fresh food	Fresh fish	(40 countries)
	Chilled soup	(25)		Fresh meat – beef	(40)
	Deli food	(40)		Fresh meat – lamb	(40)
	Sandwiches/salads	(16)		Fresh meat – pork	(40)
		Fresh meat – poultry and other		(40)	
		Fresh veg. – potatoes		(40)	
		Fresh veg. – other	(40)		
Confectionery	Chocolate	(40 countries)			
	Gum	(39)			
	Sugar confectionery	(40)			
Dairy food	Cheese	(40 countries)			
	Chilled desserts	(22)			

## Reasons to buy

- **Understand** the current and future product and channel opportunities presented by one of the fastest growing sectors of the food industry
- **See** the importance of a standardized set of 25 different foodservice channels within each country, across both the profit and cost sectors
- **Receive** the sales value data at operator buying prices – i.e. in terms of what foodservice operators actually spend with food and drink manufacturers

## Sample screenshots from the database

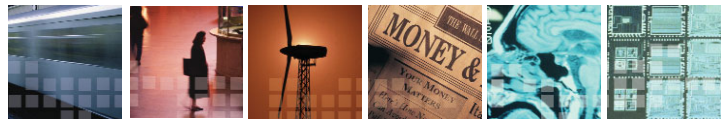
	A	B	C	D	E	F	G	H	I	J	K	L	M	N
				Sales OBP - A\$ m		Transactions (m)			Outlets			Chain outlets		
				2004	2009	2004	2009	2004	2009	2004	2009	2004	2009	
<b>FOODSERVICE BY CHANNEL</b>														
5	Profit	Cafes	-	602.6	688.0	225.0	295.6	6,642	7,250	245	288			
6		Pub and bars	-	1,439.2	1,653.9	349.0	395.0	10,204	10,457	491	528			
7		Highlobs	-	127.5	145.5	20.0	20.7	930	952	12	13			
8		Restaurants	F&R	2,332.6	2,895.6	345.0	370.9	9,884	11,190	1,398	1,512			
9			QSR	1,294.1	1,633.6	712.5	793.6	9,349	9,599	3,789	3,960			
10		Takeaways (main activity)	-	492.0	794.0	220.5	239.6	6,369	6,950	533	631			
11		Hotels & lodging	-	1,201.7	1,436.4	337.5	395.6	14,643	14,724	1,673	1,781			
12		Street & mobile vendors	-	4.4	4.9	2.0	2.1	271	279	-	-			
13		Retail	-	144.7	54.1	16.0	16.6	448	462	143	153			
14		Leisure	-	240.3	283.7	100.6	107.6	5,636	5,168	305	304			
15		Onboard	Air	43.0	59.8	-	-	-	-	-	-			
16			Rail	12.5	16.4	-	-	-	-	-	-			
17			Sea	12.5	15.9	-	-	-	-	-	-			
18			Coach	-	-	-	-	-	-	-	-			
19				-	-	-	-	-	-	-	-			
20	Cost	Workplace	-	228.0	365.1	-	-	-	-	-	-			
21		Retail, Financial & Office-based	-	217.6	244.8	-	-	-	-	-	-			
22		Other	-	95.5	105.5	-	-	-	-	-	-			
23		Education	-	1,688.2	1,885.7	-	-	-	-	-	-			
24		Tertiary	-	107.5	117.2	-	-	-	-	-	-			
25		Hospitals	-	440.4	497.4	-	-	-	-	-	-			
26		Welfare & Services	Armed Services	32.5	35.9	-	-	-	-	-	-			
27			Residential Care	178.4	217.6	-	-	-	-	-	-			
28			Welfare Meals	73.4	82.4	-	-	-	-	-	-			
29			Dietition	91.6	90.5	-	-	-	-	-	-			
30			Other	40.8	48.1	-	-	-	-	-	-			
31	<b>TOTAL</b>	<b>Overall</b>	<b>Overall</b>	<b>11,322.3</b>	<b>13,332.1</b>									
32														
33														
34														
35														
36														
37														
38														
39														
40														
41														
42	Drink	Beer, Cider & FABs	Beer	716.9	1,280.0			221.2		440.4	760.0		1,744.0	
43		Beer, Cider & FABs	Cider & perry	6.6	6.6					43.5	39.8		39.8	

## Please note

This database has a number of unique characteristics which purchasers should be aware of.

- Foodservice data – particularly on product categories – is hard-to-get and in many cases impossible to get. This database therefore contains a large degree of estimated data. However, we have cross-checked it against as many reputable secondary source as possible, making it in our view a robust set of estimates.
- Where absolutely no benchmarks were available, we have not just guessed at figures, so there are a very few blanks in the database. If you are relying on this to provide you with any very specific data, please check with your account manager.
- Because of the above this data does not conform to the requirements of the independently audited research methodology that has been employed on all other Datamonitor research.

*“...The database provides the key parameters on foodservice – sales values and outlet and transaction numbers – allowing rapid and clear decision-making...”*



## Also available - more than 100 foodservice company profiles

Accor	Club Mediterranee	Lone Star Steakhouse and Saloon	Seed Restaurant Group
AFC Enterprises	Compass Group	Luby's	Shoney's
Albergo Rinascente	Cracker Barrel Old Country Store	Luminar	SOL Melia
Allied Domecq	Culver Franchising System	Magic Restaurants	Sonic Drive-Ins
American Restaurant Group	Damon's International	Marie Callender's Pie Shops	Stanley Leisure
APEX Restaurant Group	Darden Restaurants	McDonald's	Starbucks
Applebee's Neighborhood Grill & Bar	De Vere Group	Millennium & Cophorne Hotels	Steak n Shake
Berkshire Hathway	Del Taco	Mitchells & Butlers	Texas Roadhouse
Big Boy	Denny's	New World Restaurant Group	Rank Group, The
Blimpie International	Doctor's Associates	O'Charley's	Restaurant Company, The
Bob Evans	Domino's Pizza	Outback Steakhouse	Thistle Hotels
Bojangles Restaurant	El Pollo Loco	P F Chang's China Bistro	Triarc
Brinker International	Elior	Panda Restaurant Group	VICORP Restaurants
Buffalo Grill	Enterprise Inns	Panera Bread/Saint Louis Bread Co	W H Braum
Buffalo Wild Wings	Friendly Ice Cream Corporation	Papa John's	Waffle House
Buffets Holdings	Godfather's Pizza	Piccadilly Cafeterias	Wendy's Old Fashioned Hamburgers
Burger King	Golden Corral	Punch Taverns	WesterN SizzliN
California Pizza Kitchen	Hilton Group	Quizno's Classic Subs	Whataburger
Captain D's	Hooters	RARE Hospitality International	Whitbread Plc
Carlson Companies	Houston's Restaurants	Real Mex Restaurants	White Castle System
Carnival	Ilitch Holdings	Red Robin Gourmet Burgers	Worldwide Restaurant Concepts
CBRL Group	In-N-Out Burgers	Romacorp	Yum Brands
Checkers Drive-In Restaurants	International House of Pancakes	Round Table Franchise Corp	
Cheesecake Factory, The	Jack in the Box	Ruby Tuesday	
Chick-fil-A	Kesko Corporation	Ruth's Chris Steak House	
Chuck E. Cheese's	Krispy Kreme	Ryan's Family Steak House	
CiCi Enterprises	Krystal Company	Sbarro	
CKE Restaurants	Landry's Restaurants	Schlotzky's Deli	



## Other reports available from Datamonitor Consumer

### **Trends and Behaviors in Eating Out 2005** *NEW!*

Eating out has evolved around a broad range of consumer needs ranging from a desire to experience new, exotic cuisines from fine dining venues to obtaining a 'grab-and-go' solution from a fast food outlet or even a convenience store. This report offers a complete review of European and US consumers' eating out habits and the subsequent impact of these changes on the foodservice and retail markets.

*Published: Feb-05*      *Product code: DMCM1817*

### **Trends and Behaviors in the On-Trade 2004**

Growth is slowing in the on-trade but new consumer behaviors and unmet needs are emerging leaving the on-trade vastly different from that of five years ago. This provides the chance for drinks manufacturers to exploit untapped opportunities. Consumers have become more demanding, desiring quality, novelty and sophistication from the on-trade to portray a desired social image.

*Published: Sep-04*      *Product code: DMCM1094*

### **People On-the-Move**

European consumers' time is under growing pressure. As working hours and commuting times grow longer, people have less time available. As a result, many use the time spent traveling to eat, drink or groom, a practice that is known as on-the-move consumption. But consumers' propensity to consume on-the-move is governed by overarching trends which are identified and analyzed to size this market.

*Published: Jan-2004*      *Product code: DMCM0684*

### **Health On-the-Go**

There is an increasing clash between two food mega-trends, convenience and health, which busy people find difficult to overcome. This report analyzes the conflicting consumer need states and identifies where food and drinks players can help. In addition, consumers current healthy eating and drinking habits and needs when on-the-go are quantified, analyzed and forecasted to 2007.

*Published: Oct-03*      *Product code: DMCM0491*