

Foodservice Research
INSTITUTE

The BEST Report®

Market Size and Brand Share Research in Your Foodservice Product Category

BEST provides Market Size and Brand Share information projectable to comprehensive operator market segments



**Brand Equity
Share Trends**

BEST Prospectus

- Since 1992, The BEST Survey of operators has investigated more than 125 Foodservice product categories with 100+ Food Supplier Companies and Associations participating.
- BEST Reports® are custom designed for clients who get the benefit of sharing the fielding cost with non competing manufacturers.
- Considering the costs associated with interviewing 1800 restaurants, the shared cost approach results in huge savings for the marketer.
- BEST provides valuable, hard to find category insight on Food Product Market Size and Brand Share detailed for **9 commercial and 5 non-commercial** market segments.
- BEST participants also get sub segment detail showing market size for 35 smaller segments/ concepts in which there may be an interest.
- These segments include Casual Italian Pizza Chains, Casual Mexican Chains, Casual Steakhouses, Fine Dining (Ethnic and American), QSR Burger Chains, QSR Chicken Chains, QSR Independent, Sub Sandwich Delis and more.
(see page 6 of this brochure)

Data Insight Into Your Categories

- Market Size detailed by Operator Market Segment and Region
- Brand Share detail for all competing brands, including major distributors
- Printed Report with graphs/charts/tables and Summary of Findings
- Sample stratified for each of 35 sub market segments within each of four regions
- Trend reports available for BEST categories studied previously

BEST Reports Include

- Executive Summary --- generally 3 to 5 slides
- Detailed Findings --- 15 to 25 charts utilizing tables and graphs
- Trend reports in second and succeeding years increase the size of the Executive Summary and Detailed Findings
- Computer tabulations provide detailed information on the brand share of each brand and company of all reported brands

Onsite Phone Interviewing

- In-house staff of phone interviewers
- Dedicated 9 seat Call Center
- VoIP phone system keeps down cost for client.
- Managed by Call Center Manager with Research Systems Engineer on site

IBM SPSS Data Collection Suite

- Industry Standard for Data Collection and Analysis in Survey Research
- IBM/SPSS Software Suite provides tools for Questionnaire Programming, Interviewer Data Collection and Report Writing to ensure quality from end to end.
- Reporting allows for any two questions (variables) in survey to be cross tabulated.

BEST Category Experience

Aerosol Spray Food Release	Danish, Frozen Pre-Baked	Frozen Pancakes/Waffles	Pie Shells
Aerosol Toppings	Dehydrated Hash Browns	Frozen Prep. Italian Foods	Pizza
Apple Sauce, Bulk	Dehydrated Soup	Frozen/ Refrigerated Soup	Pizza Sauce
Back of House Bulk Mustard	Dehydrated/Mashed Potatoes	Fruit and Pie Filling	Pork Barbecue, Fresh or Frozen
Bacon	Dessert Bars	Fruit Filling/Pie Filling	Portion Control Beef Patties
Bagels, Frozen Pre-Baked	Dinner Sausage	Fruit Pies	Portion Control Beef Steaks
BBQ Sauce	Donuts	Green Chilies, Bulk	Pre-Cooked Beef Roasts
Beef Barbecue, Fresh or Frozen	Dough Sheets	Ground Beef Bulk	Puff Pastry Dough Sheets
Biscuit Mix	Dressing Mix	Guacamole	Ready To Eat Cookies
Biscuits, Frozen Pre Baked	Dry Candy Toppings	Hearth Breads & Rolls	Ready To Eat Crackers
Breaded Shrimp	Dry Creamers, PC and Bulk	Hot Dogs	Ready to Whip Toppings
Breakfast Sausage	Dry Gravy Mix	Hot Sauce	Ref. Prep. Frt. Salads/
Brownies	Dry Mix Fruit Drinks	Ice Cream Cones	Ref. Prepared Salad
Bulk Froz. Ice Cream / Yogurt	Dry Pasta	Imitation and Real Crab	Rice
Bulk Nacho Chips	Dry Sausage	Indiv. Wrapped Pastries	Salmon
Bulk Potato Chips	Eggs	Italian Deli Meats	Salsa
Butter / Margarine, P.C.	Eng. Muffins, Fr. Pre-Baked	Juices/Drinks, SS, Ind.Srv	Sausage Crumbles Pizza
Butter / Margarine, Bulk	Entrees, Frozen	Ketchup, Bulk	Scallops
Canned Entrees	Evaporated Milk	Frozen Pancakes/Waffles	Seasoned Fries
Canned Soup	Dehydrated Hash Browns	Layer Cakes	Seasoning Mixes (6 Types)
Cheese	Fats & Oils	Lobster	Single Serve Snacks
Cheese Sauce	Fluid Milk, Bulk (as ingredient)	Macaroni & Cheese	Sliced Deli Meats
Cheese Types	Fluid Milk, Single Serve	Mayo and Dressing, Bulk	Smoked Beef Brisket
Cheesecake	Food Bases	Mayo and Dressing, P.C.	Smoked Sausage
Chicken Fried Steak	French Fries	Meatless/Vegan	Soft Rolls & Buns
Chocolate Products	Fresh Italian Sausage	Mozzarella Cheese	Soy Sauce
Chocolate Syrup	Fresh Pork Cuts for Ingrid.	Muffin Mix	Spoonable Dressing
Cinnamon Rolls	Fresh Pork Ribs	Pickles	Spreadable Cheese
Cocktail Sauce	Fresh Pork Shoulder, Legs	Pepperoni Pizza Topping	Steak Sauce
Cocoa Mix, Bulk Packed	Fresh Pork Chops/Loins	Muffins, Frozen Pre-Baked	Sweet Goods, Frozen Pre-Baked
Coffee	Froz. Conc. Juices	Mustard, Bulk	Sweetened Condensed Milk
Cookie Pieces and Crumbs	Froz. Liq. Egg Substitutes	Mustard, PC	Table Top Steak Sauce
Condensed Milk/	Frozen Breaded Appetizers	P.C. Cream Cheese	Teriyaki Sauce
Corn Dogs	Frozen Chicken	P.C. Jams / Jellies	Yogurt Cups
Cream Pies	Frozen Cookie Dough	P.C. Pancake Syrup	Yogurt Bulk
Coffee Creamers, Liquid	Frozen Fish Fillets and Portions	Pasta Sauce	Turkey Breasts
Coffee Creamers, PC	Frozen Formed Potatoes	Pita Bread	Whole Ham

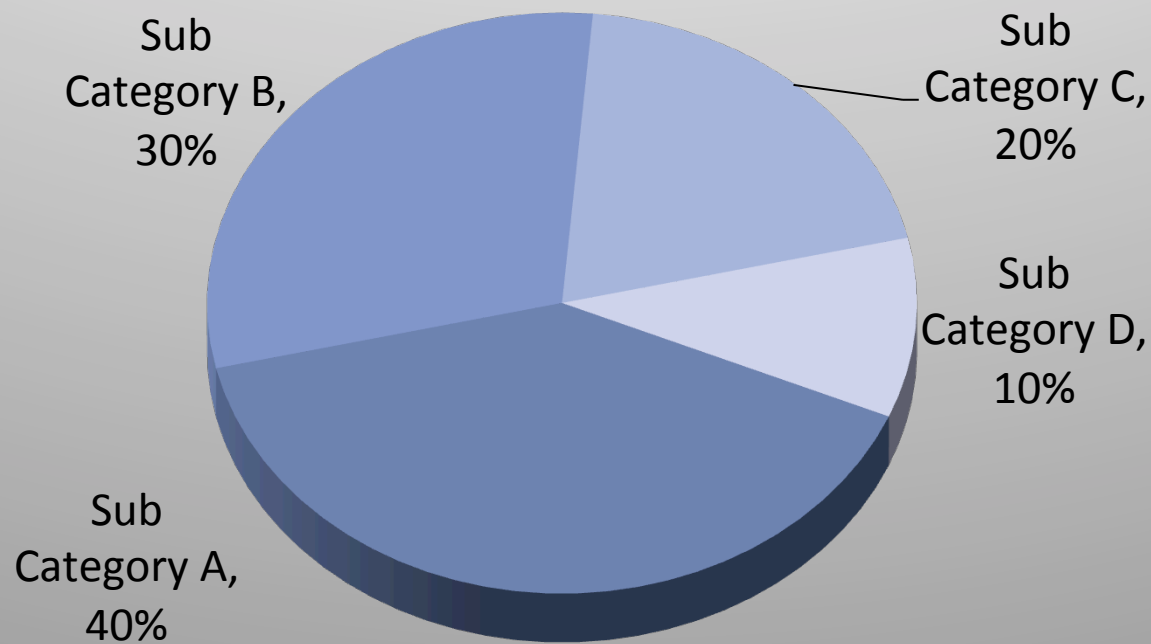
BEST Report Market Segmentation

Market Segment	Universe Size # of Operations	Questionnaire Completions	Sample Share
1. Fine Dining	3,421	50	2.8%
2. Casual/Upscale Chains	40,487	182	10.1%
3. Midscale Restaurant Chains	19,438	90	5.0%
4. Quick Service Chains	170,746	366	20.3%
5. Casual/Upscale Independents	107,149	125	6.9%
6. Midscale Independents	108,270	105	5.8%
7. Quick Service Independents	76,868	182	10.1%
8. Hotels/Motels	12,490	100	5.6%
9. C-Stores	105,000	100	5.6%
TOTAL COMMERCIAL	643,869	1,300	72.2%
10. Hospitals	5,920	100	5.6%
11. Nursing Homes/Retire. Ctrs.	17,500	100	5.6%
12. Colleges	3,032	100	5.6%
13. School Districts	14,500	100	5.6%
14. Business and Industry	12,500	100	5.6%
TOTAL NON-COMMERCIAL	60,565	500	27.8%
TOTAL U.S. Sample	712,518	1,800	100.0%

Share of Volume By Type

Total Volume: 550 mm pounds

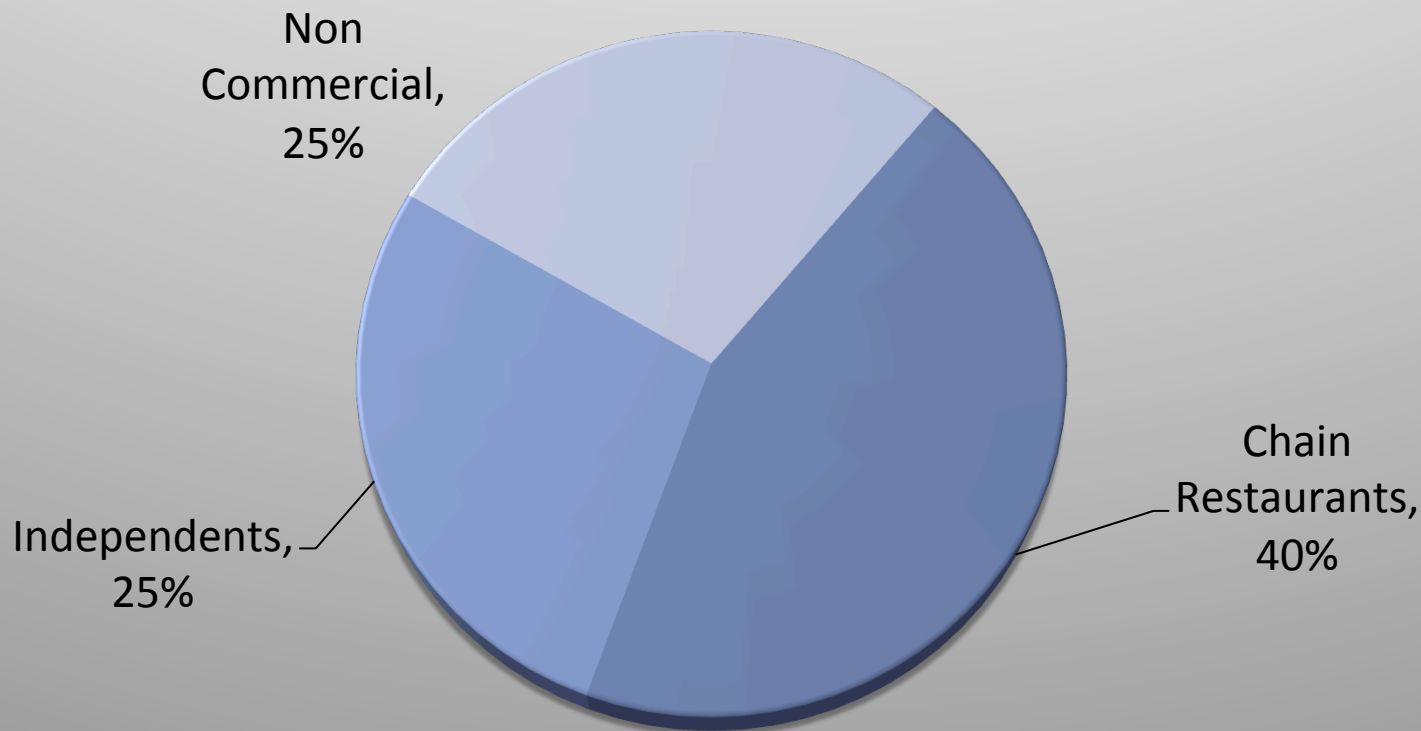
- Explanatory bulleted information on category research results



Market Size, By Operation Type

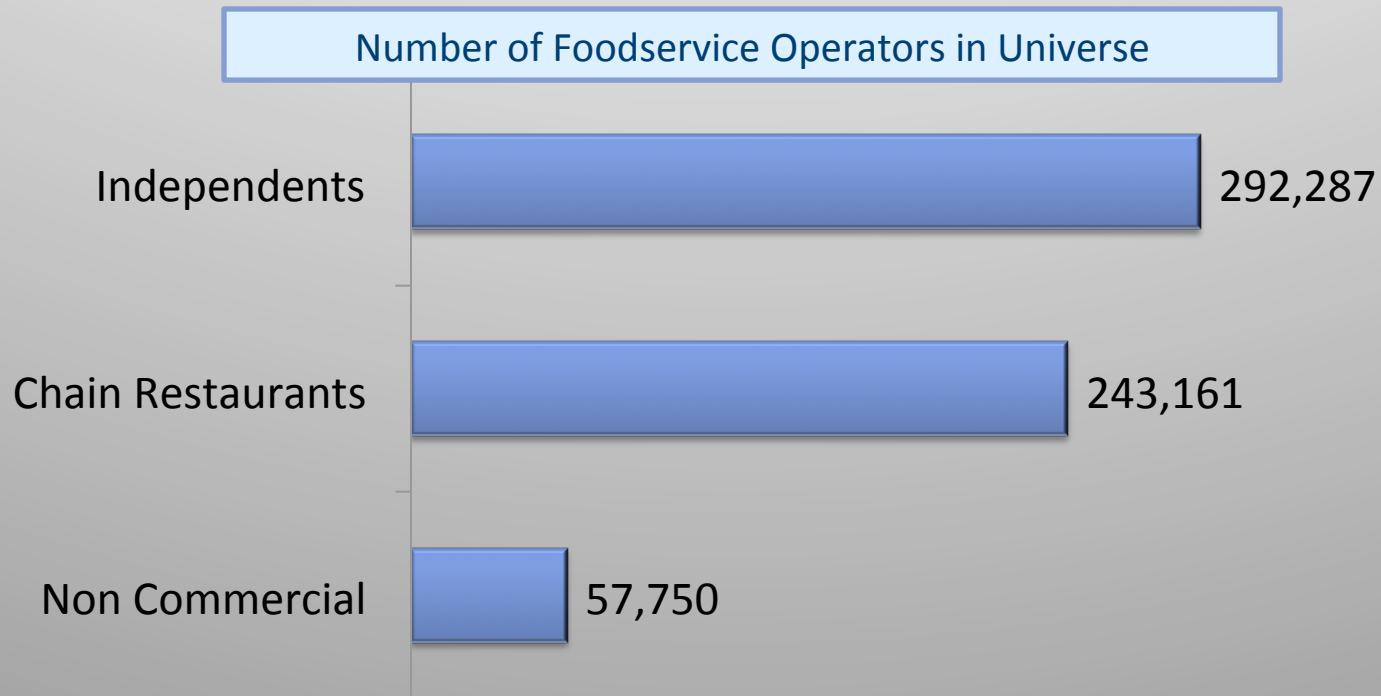
- Chains use an estimated 37.6% of total cases of this category, while Independent Restaurants use 26.8% and Non Commercial 35.6%.

Total Volume: 550 mm pounds



Foodservice Marketplace

There are approximately 593,000 purchasing contact points in foodservice and within this universe, a total of 1,853 operators were contacted by Foodservice Research Institute to collect information on the purchasing of ---

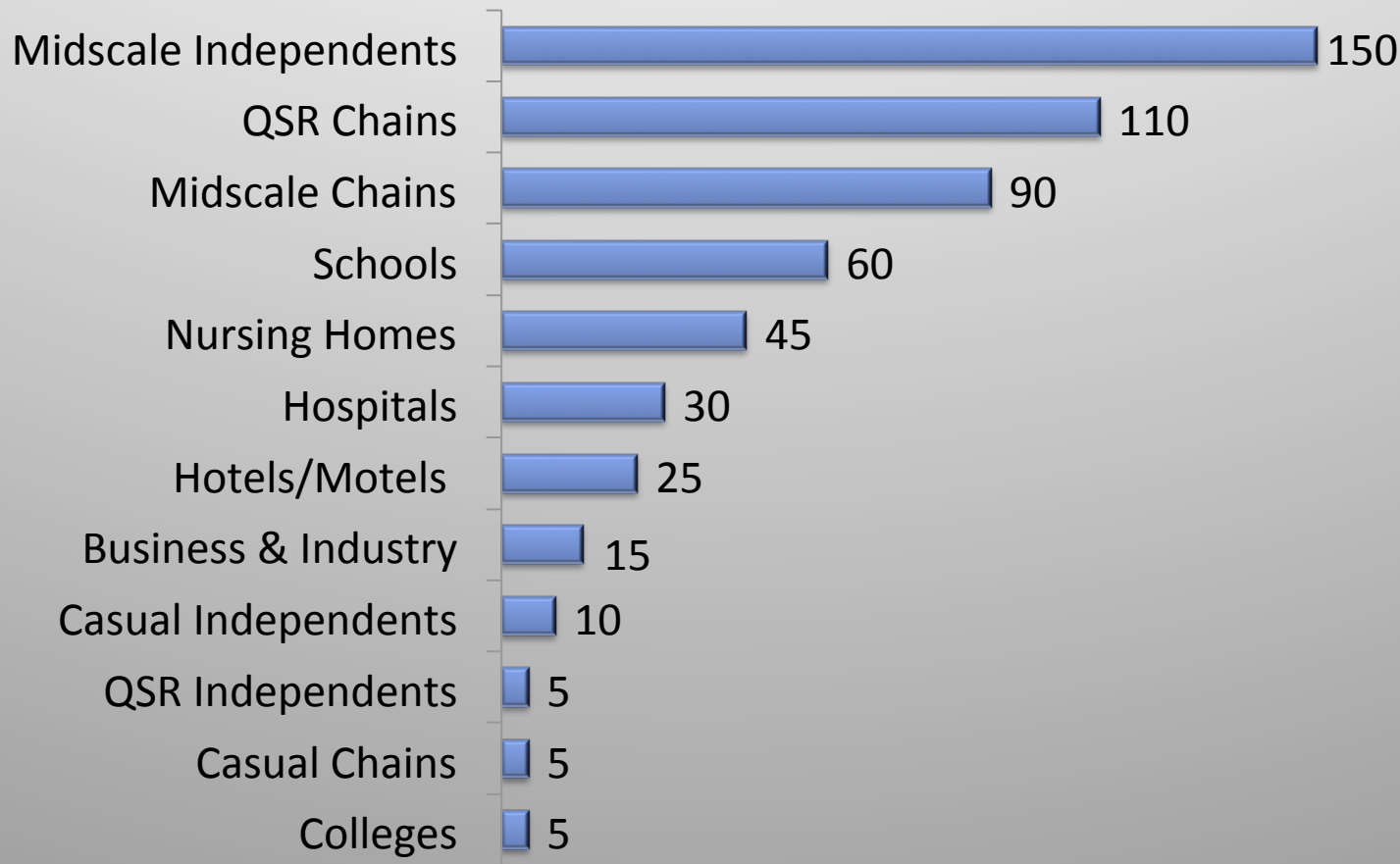


BEST sample did not include C-Stores, Military Bases, or Grocery.

Volume Used In Commercial Segments, 2010

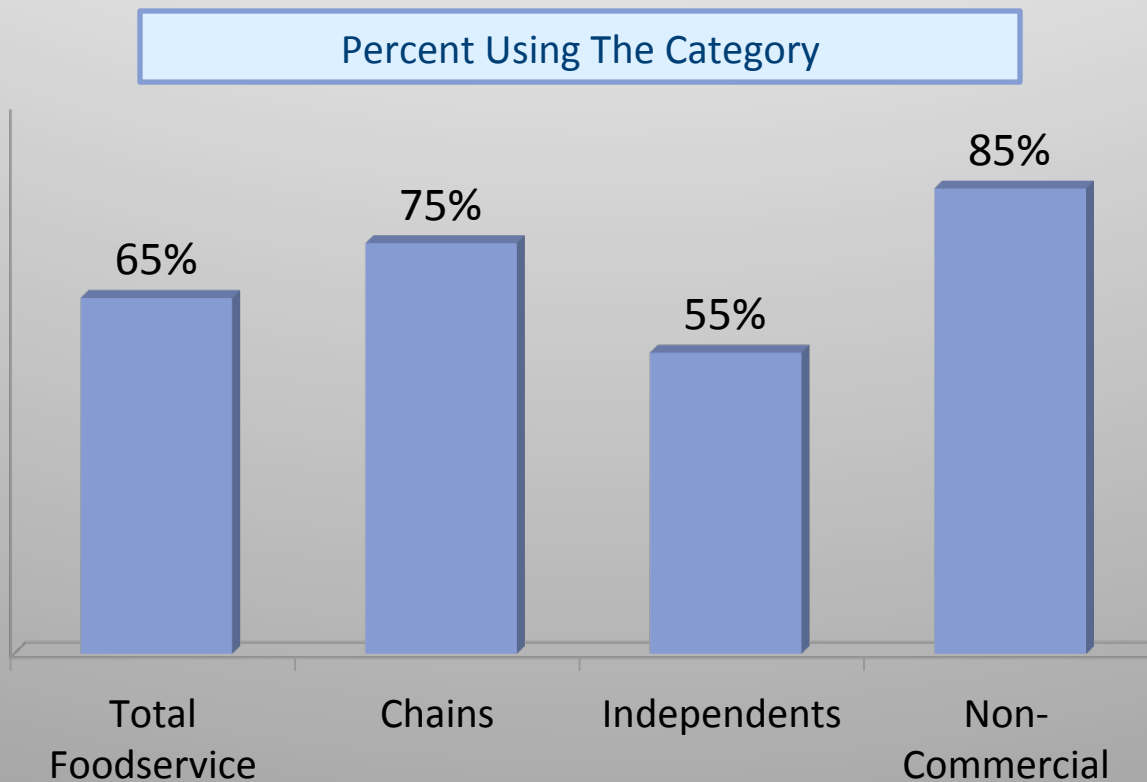
(550 Million Pounds)

- Consolidating market size data into 12 major market segments, -----



Category Incidence by Operation Type

- Approximately two thirds of all foodservice operations uses ---



Market Size and Average Case Volume

- Out of a total foodservice marketplace of approximately 593,000 chains, independents and non commercial operators, a projected 310,220 operators purchases -----

Market Sector	Operating Units in Foodservice	Operating Units Using Category	Average Pounds Per Operator Using Per Year
Chain Restaurants	243,161	129,990	900
Independent Restaurants	292,287	139,620	850
Non Commercial	57,750	40,610	1200
Total Foodservice:	593,198	310,220	900

Category Incidence in Chains

- Shown below are the names of 15 Chain sub segments representing approximately 243,161 chain operating units. Within this set of chains, -----

Chain Restaurants	# Operating Units	% Using Category
Casual Chain Asian	5,101	35%
Casual Chain Italian Pizza	14,607	75%
Casual Chain Mexican	4,742	65%
Casual Chain Steak Rib Seafood	5,395	55%
Casual Chain Theme Bar Grill	10,642	55%
Casual Chains:	40,487	55%
Midscale Chain Buffet BBQ Salad	5,167	75%
Midscale Chain Family Dining	14,271	65%
Midscale Chains:	19,438	70%
QSR Chain Asian	2,592	35%
QSR Chain Burger Dog	42,741	75%
QSR Chain Chicken Seafood	15,277	65%
QSR Chain Coffee Bagel Bakery Snack	20,546	55%
QSR Chain Mexican	12,220	55%
QSR Chain Pizza Italian	39,107	45%
QSR Chain Sub Sandwich Deli	38,263	55%
QSR Chains:	170,746	55%
Hotels	12,490	85%
All Chain Restaurants:	243,161	75%

Category Incidence in Independents

- Same as for Chains (previous slide), 10% of the more than 292,000 independent restaurants use -----

Independent Restaurants	# Operating Units	% Using Category
Casual Indep Asian	34,519	35%
Casual Indep Italian Pizza	9,985	75%
Casual Indep Mexican	15,112	65%
Casual Indep Steak Rib Seafood	10,267	55%
Casual Indep Theme Bar Grill	37,266	55%
Casual Independents:	107,149	55%
Midscale Indep Buffet BBQ Salad	11,374	75%
Midscale Indep Family Dining	96,896	65%
Midscale Independents	108,270	70%
QSR Indep Asian	2,549	35%
QSR Indep Burger Dog	7,237	75%
QSR Indep Chicken Seafood	3,714	65%
QSR Indep Coffee Bagel Bakery Snack	15,778	55%
QSR Indep Mexican	4,997	55%
QSR Indep Pizza Italian	23,574	45%
QSR Indep Sub Sandwich Deli	19,019	55%
QSR Independents	76,868	55%
All Independent Restaurants	292,287	55%

Category Incidence in Non Commercial

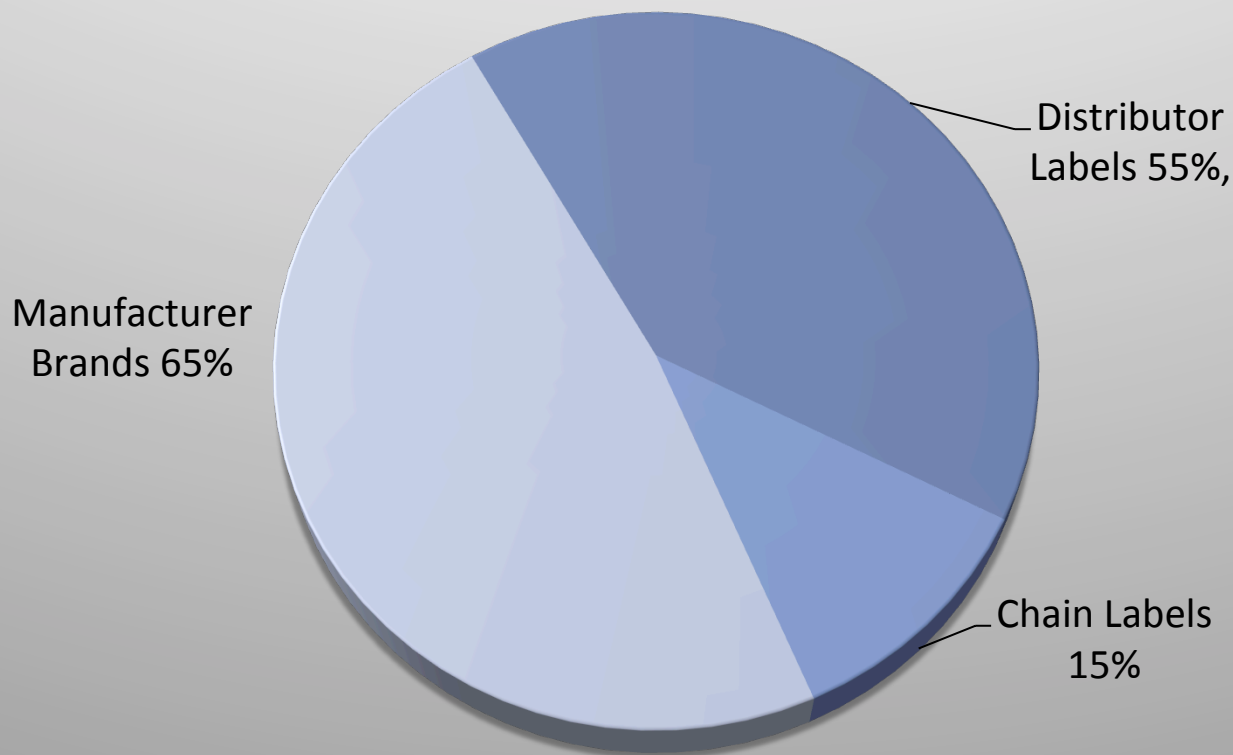
- There are 57,750 non commercial operators in foodservice, however, this does not count an approximate 95,000 individual schools and multiple serving venues within each institution.
- Within this group, over half (53%) report offering ---

Non Commercial	# Operating Units	% Using Category
Hospitals	5,700	75%
Nursing Homes /Retirement	20,500	65%
College University	4,400	75%
Schools (districts)	16,650	25%
Business & Industry	10,500	85%
All Non Commercial:	57,750	70%

Brand Share Summary

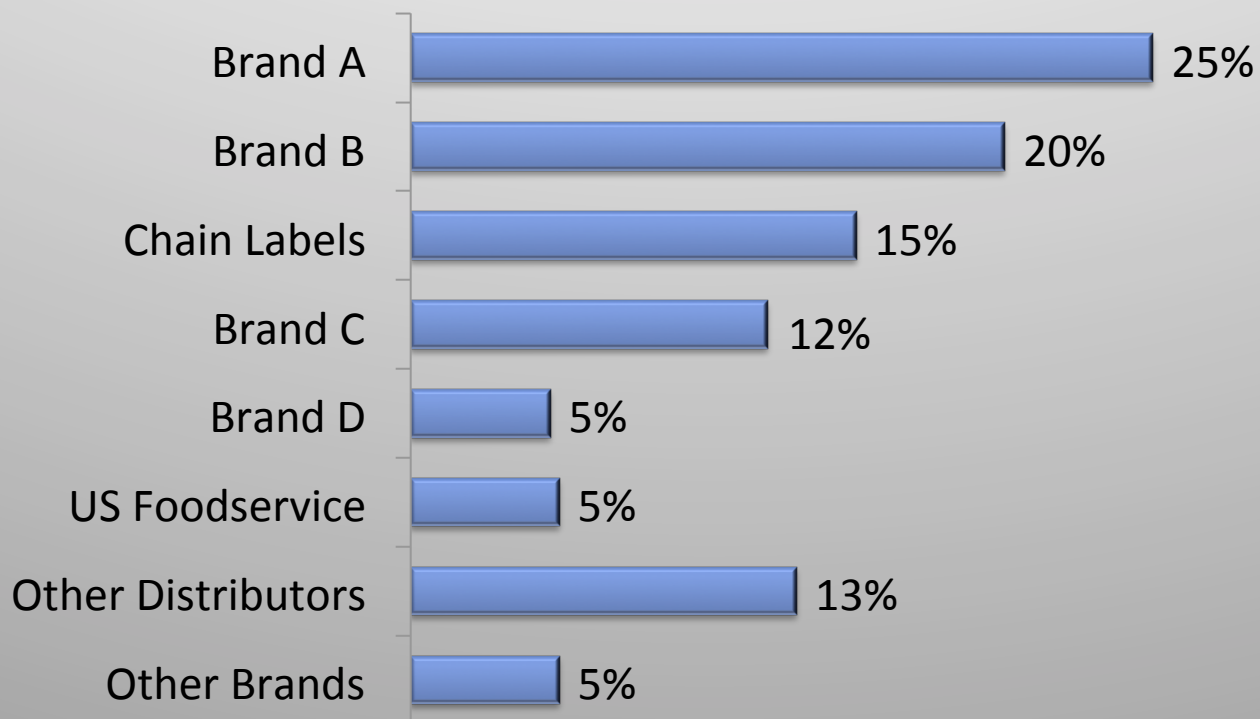
All Flavors/Types

- The Category is a strong market for manufacturer brands, which collectively have a market share in the range of -----



Brand Share Summary

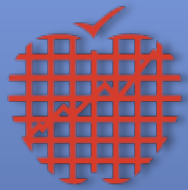
- Brand A is the leading brand by far in the foodservice market for -----



Key Market Segment Report --- The Category

- Brand A is the leading brand in the following market segments -----.

	Brand A	Brand B	Brand C	Sysco	US Foodservice	Brand E	Chain Labels	Other Distributors	Other Brands
Casual Chains	30%	10%	20%	15%	5%	5%	5%	5%	5%
Casual Indep.	25%	10%	20%	20%	10%	10%	10%	10%	10%
Midscale Chains	25%	15%	20%	15%	5%	5%	5%	5%	5%
Midscale Indep.	35%	20%	25%	15%	10%	10%	10%	10%	10%
QSR Chains	20%	20%	5%	30%	5%	5%	5%	5%	5%
QSR Indep.	10%	10%	20%	10%	10%	10%	10%	10%	10%
Hotel	15%	10%	15%	10%	10%	10%	10%	10%	10%
Hospitals	25%	20%	15%	15%	5%	5%	5%	5%	5%
Nursing Homes	15%	15%	25%	20%	5%	5%	5%	5%	5%
College Univ.	10%	5%	15%	20%	10%	10%	10%	10%	10%
Schools	15%	10%	10%	15%	10%	10%	10%	10%	10%
Bus. & Industry	25%	30%	10%	10%	5%	5%	5%	5%	5%



Foodservice Research
INSTITUTE

The BEST Report®

End of Report
Thank You

foodserviceresearchinstitute.com

chainmenus.com

twitter.com/menumine

800-685-BEST