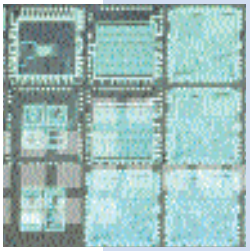
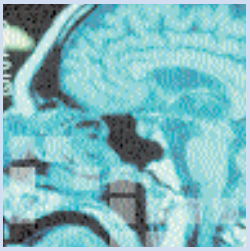



A Datamonitor report

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

DATAMONITOR

Introduction

This database provides estimates of the size of the foodservice market – segmented by major channel and by food and drink product category – 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 reveiw 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 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 has sales value data (again at operator buying prices) for both food and drinks product categories. Specifically, it will provide value data on the following food categories.

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

Access to more than 100 foodservice company profiles

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

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

Please note

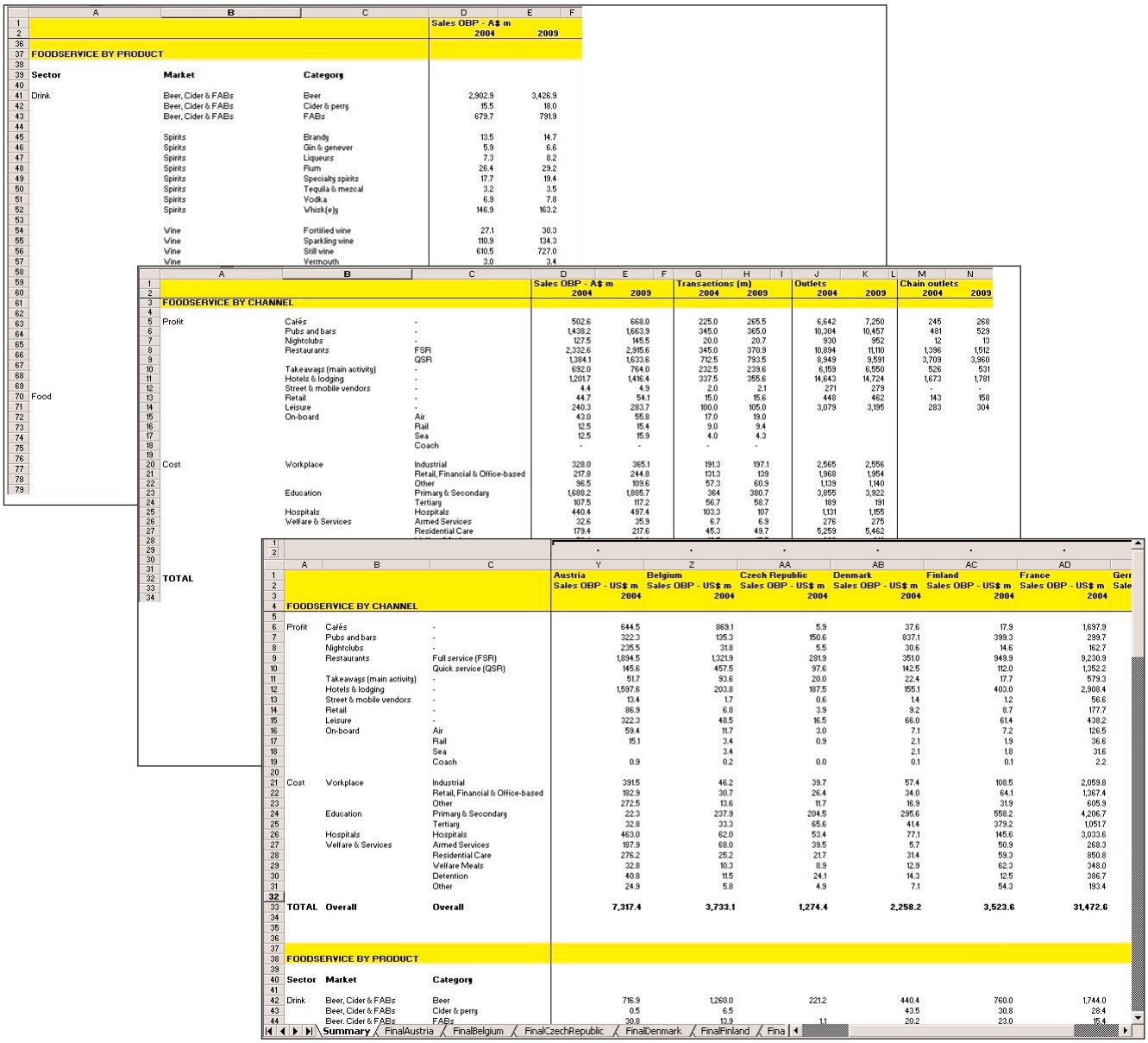
This database has a number of unique characteristics which purchasers should be aware of.

- 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 PricewaterhouseCoopers 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..."

Piers Berezai, Lead Analyst

Sample screenshots from the database



FOODSERVICE BY PRODUCT

Sector	Market	Category	Sales OBP - A$ m 2004	Sales OBP - A$ m 2009
Drink	Beer, Cider & FABs	Beer	2,902.9	3,426.9
	Beer, Cider & FABs	Cider & perry	15.5	18.0
	Beer, Cider & FABs	FABs	679.7	791.9
	Spirits	Brandy	13.5	14.7
	Spirits	Gin & genever	5.9	6.6
	Spirits	Liqueurs	7.3	8.2
	Spirits	Rum	26.4	29.2
	Spirits	Specialty spirits	17.7	19.4
	Spirits	Tequila & mezcal	3.2	3.5
	Spirits	Vodka	6.9	7.8
	Spirits	Whisk(e)y	146.9	163.2
	Vine	Fortified vine	27.1	30.3
	Vine	Sparkling wine	110.9	134.3
	Vine	Still wine	610.5	727.0
	Vine	Vermouth	3.0	3.4

FOODSERVICE BY CHANNEL

			Sales OBP - A$ m 2004	Sales OBP - A$ m 2009	Transactions (m) 2004	Transactions (m) 2009	Outlets 2004	Outlets 2009	Chain outlets 2004	Chain outlets 2009
Profit	Cafés	-	502.6	668.0	225.0	265.5	6,642	7,250	245	268
	Pubs and bars	-	1,438.2	1,663.9	345.0	365.0	10,304	10,457	481	529
	Nightclubs	-	127.5	145.5	20.0	20.7	930	952	12	13
	Restaurants	FSR	2,332.6	2,915.6	345.0	370.9	10,894	11,110	1,396	1,512
		QSR	1,384.1	1,633.6	712.5	793.5	8,949	9,591	3,709	3,960
	Takeaways (main activity)	-	692.0	764.0	232.5	239.6	6,159	6,550	526	531
	Hotels & lodging	-	1,201.7	1,416.4	337.5	355.6	14,643	14,724	1,673	1,781
	Street & mobile vendors	-	4.4	4.9	2.0	2.1	271	279	-	-
Food	Retail	-	44.7	54.1	15.0	15.6	448	462	143	158
	Leisure	-	240.3	283.7	100.0	105.0	3,079	3,195	283	304
	On-board	Air	43.0	55.8	17.0	19.0				
		Rail	12.5	15.4	9.0	9.4				
		Sea	12.5	15.9	4.0	4.3				
		Coach	-	-	-	-				
Cost	Workplace	Industrial	328.0	365.1	191.3	197.1	2,565	2,556		
		Retail, Financial & Office-based	217.8	244.8	131.3	139	1,968	1,954		
		Other	96.5	109.6	57.3	60.9	1,139	1,140		
	Education	Primary & Secondary	1,688.2	1,885.7	364	380.7	3,855	3,922		
		Tertiary	107.5	117.2	56.7	58.7	189	191		
	Hospitals	Hospitals	440.4	497.4	103.3	107	1,131	1,155		
	Welfare & Services	Armed Services	32.6	35.9	6.7	6.9	276	275		
		Residential Care	179.4	217.6	45.3	48.7	5,259	5,462		

TOTAL

			Austria Sales OBP - US$ m 2004	Belgium Sales OBP - US$ m 2004	Czech Republic Sales OBP - US$ m 2004	Denmark Sales OBP - US$ m 2004	Finland Sales OBP - US$ m 2004	France Sales OBP - US$ m 2004
FOODSERVICE BY CHANNEL								
Profit	Cafés	-	644.5	869.1	5.9	37.6	17.9	1,697.9
	Pubs and bars	-	322.3	135.3	150.6	837.1	399.3	299.7
	Nightclubs	-	235.5	31.8	5.5	30.6	14.6	162.7
	Restaurants	Full service (FSR)	1,894.5	1,321.9	281.9	351.0	949.9	9,230.9
		Quick service (QSR)	145.6	457.5	97.6	142.5	112.0	1,352.2
	Takeaways (main activity)	-	51.7	93.6	20.0	22.4	17.7	579.3
	Hotels & lodging	-	1,597.6	203.8	187.5	155.1	403.0	2,908.4
	Street & mobile vendors	-	13.4	1.7	0.6	1.4	1.2	56.6
	Retail	-	86.9	6.8	3.9	9.2	8.7	177.7
	Leisure	-	322.3	48.5	16.5	66.0	61.4	438.2
	On-board	Air	59.4	11.7	3.0	7.1	7.2	126.5
		Rail	15.1	3.4	0.9	2.1	1.9	36.6
		Sea		3.4		2.1	1.8	31.6
		Coach	0.9	0.2	0.0	0.1	0.1	2.2
Cost	Workplace	Industrial	391.5	46.2	39.7	57.4	108.5	2,059.8
		Retail, Financial & Office-based	182.9	30.7	26.4	34.0	64.1	1,367.4
		Other	272.5	13.6	11.7	16.9	31.9	605.9
	Education	Primary & Secondary	22.3	237.9	204.5	295.6	558.2	4,206.7
		Tertiary	32.8	33.3	65.6	41.4	379.2	1,051.7
	Hospitals	Hospitals	463.0	62.0	53.4	77.1	145.6	3,033.6
	Welfare & Services	Armed Services	187.9	68.0	39.5	5.7	50.9	268.3
		Residential Care	276.2	25.2	21.7	31.4	59.3	850.8
		Welfare Meals	32.8	10.3	8.9	12.9	62.3	348.0
		Detention	40.8	11.5	24.1	14.3	12.5	386.7
		Other	24.9	5.8	4.9	7.1	54.3	193.4
TOTAL	Overall	Overall	7,317.4	3,733.1	1,274.4	2,258.2	3,523.6	31,472.6
FOODSERVICE BY PRODUCT								
Drink	Beer, Cider & FABs	Beer	716.9	1,260.0	221.2	440.4	760.0	1,744.0
	Beer, Cider & FABs	Cider & perry	0.5	6.5		43.5	30.8	28.4
	Beer, Cider & FABs	FABs	30.8	13.9	11	20.2	23.0	15.4

Summary | FinalAustria | FinalBelgium | FinalCzechRepublic | FinalDenmark | FinalFinland | Fina

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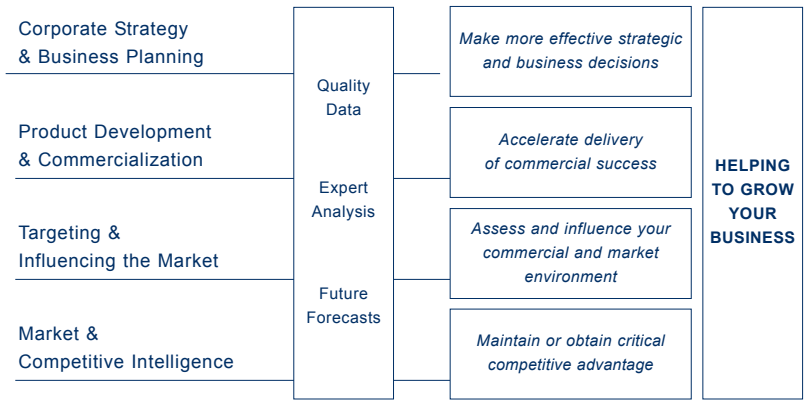

Nothing speaks louder than our client list

Cadbury Schweppes
Campbell's Soup
Carlsberg
Coca-Cola
Colgate-Palmolive
ConAgra
Dairy Crest
Diageo
Dow Corning
Dr Oetker
Elida Fabergé
Ferrero
Geest
General Mills
Glanbia UK
H J Heinz
Heineken
Holsten
Interbrew
Intersnack
J Sainsbury
Jacobs Suchard
Kraft Foods
Lorenz Bahlsen Snackworld
Luigi Lavazza
LVMH
Marks & Spencer
Mars
Master Foods
McCain Foods Ltd
Müller Dairy
Nabisco
Nestlé
Orkla
Reckitt Benckiser
Rexam
Sara Lee
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United Biscuits Plc
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Trends in Going Out 2004 *Coming soon!*

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*