

Fare Forecast

U.S. Foodservice Industry: Food and Non-alcoholic Beverages Only

Technomic Forecast 2013-2014 (May 2013 Update)

Segment	Nominal Growth Forecast		Real Growth Forecast	
	2013(P)	2014(F)	2013(P)	2014(F)
Total Restaurants and Bars	3.8%	4.1%	0.8%	1.0%
Limited-service restaurants	4.0		1.0	
Full-service restaurants	3.5		0.5	
Bars and taverns	4.5		1.5	
Total Beyond Restaurants	3.8%	4.1%	1.1%	1.3%
Retail hosts (supermarkets, convenience stores, other retailers)	4.8		1.7	
Travel & leisure (recreation, lodging, transportation)	4.0		1.0	
Business & industry	4.0		1.0	
Education (primary/secondary schools*, colleges/universities)	3.0		1.1	
Healthcare (hospitals, long-term care, senior living)	4.5		1.5	
All other (vending/coffee service, caterers, military*, corrections*)	3.0		0.4	
Total foodservice	3.8%	4.1%	0.9%	1.1%

Note: Nominal growth assumes inflation rate of 3.0% for 2013 and 2014. 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 redefinitions, resegmentation and revisions.

*Segment uses special "government" inflation of 1% for 2013 and 2014; (P) preliminary; (F) forecast

Source: Technomic Inc.