

Table of Contents Elements

	Study Background and Objectives	6
I	Landscape Assessment and Outlook	
	US Food Industry (\$ bn)	8
	size and growth of traditional foodservice and retail channels plus emergence of nontraditional channels	
	2016 Operator Purchases by Segment	9
	size and market share by major operator segments / groups	
	Foodservice Industry Growth Analysis (\$ bn)	10
	dollar and share growth by primary operator group	
	2016 Restaurant Market Composition	11
	chain versus independent share of units and purchases	
	2016 Restaurant Purchases by Segment (\$ bn)	12
	chain and independent purchases by primary segment	
	2016 Restaurant Market Shares of Purchases	13
	chain and independent purchase shares for fast food / fast casual and full service	
	Independent Restaurant Market Growth	14
	projected growth of independent restaurants versus all others by 2025	
	The Independent Restaurant* Market (2016 estimates)	15
	estimated independent restaurant units and purchases (2016)	
	Unit Growth 2016-2025 (000)	16
	restaurant unit growth by primary segment for chains, LLOs and others	

Table of Contents Elements

Current and Forecasted Industry Volume (\$ bn) contracted versus non-contracted operator purchase growth; 2016 - 2025	17
2016 Contract Volume by Segment (\$ bn) operator segment shares of total contracted volume	18
Contract Volume Growth by Segment (\$ bn) contracted volume size and growth projections through 2025 by operator segment	19
Operator Purchases by Major Segments (\$ bn) size and growth of purchases for GPOs, Top 500 chains and all other; 2016 - 2025	20
GPO: Structure and Definitions definitions and examples of primary GPO types	21
2016 Operator Purchases by Product Category size and growth of primary product categories (frozen, refrigerated, shelf stable and non-food); 2016 - 2025	22
Foodservice Distributor Sales (\$bn) sales and growth by type of distributor; 2016 - 2025	23
Analysis of Distribution Channel comments / outlook for each type of distributor	24
2016 Distributor Brand Sales by Type of Distributor (\$ bn) distributor brand share by type of distributor	25
2016 Operator Purchases by Brand Type size and share of operator purchases: manufacturer, distributor and custom chain brands	26
Forecasted Operator Purchased by Brand Type (\$ bn) size and growth of operator brand purchases from 2016 - 2025; manufacturer, distributor and chain custom	27

Table of Contents Elements

II Critical Strategic Issues

detailed assessment of critical strategic issues impacting each of these go-to-market elements

Independent Restaurants	29-30
Restaurant Chains	31-32
Top 25 FSMs	33
GPOs	34
Distributors	35-36
Manufacturer Trade Customer Practices and Priorities	37-40
Cost to Serve - Manufacturers	41
Cost to Serve	42
Cost to Serve - Distributors	43-44
Sector Coverage and Business Development	45
Future State Readiness Assessments	46
Impact of Enabling Technologies	47-48
Manufacturer Coverage, Staffing and Compensation	49-50
Brokers	51-54

Table of Contents Elements

III Imperatives

Comprehensive review of go-to-market imperatives associated with each go-to-market element

LLOs	56
Restaurant Chains	57-58
Top 25 FSMs	59-61
GPOs	62
Distributors	63
Manufacturer Trade Customer Practices and Priorities	64
Cost-to-Serve	65
Sector Coverage and Business Development	66
Future State Readiness Assessments: Achieving Competitive Advantage	67
Impact of Enabling Technologies	68
Manufacturer Coverage, Staffing and Compensation Options	69
Brokers	70-71

Table of Contents Elements

IV Critical Go-to-Market Recommendations

Pentallect's go-to-market recommendations and action plans for clients to position themselves for success in the evolving operating environment

Critical Go-to-Market Recommendations Summary	73
1. Focus on the street	74
2. Strengthen your key customer portfolio	75
3. Develop a relentless focus on ROI	76
4. Build non-traditional channel coverage capabilities	77
5. Move Toward a More Hybrid Sales Organization Model	78
6. Develop and effective compliance model	79
7. Strategically invest in technology	80-81
8. Prepare for transparency	82
Critical Go-to-Market 2025: Options and Imperatives Summary	83