

# Table of Contents Elements

	<b>Study Background and Objectives</b>	<b>4</b>
<b>I</b>	<b>Landscape Assessment and Outlook</b>	
	<b>US Food Industry (\$ bn)</b>	<b>6</b>
	size and growth of traditional foodservice and retail channels plus emergence of nontraditional channels	
	<b>2016 Operator Purchases by Segment</b>	<b>7</b>
	size and market share by major operator segments / groups	
	<b>Foodservice Industry Growth Analysis (\$ bn)</b>	<b>8</b>
	dollar and share growth by primary operator group	
	<b>2016 Restaurant Market Composition</b>	<b>9</b>
	chain versus independent share of units and purchases	
	<b>2016 Restaurant Purchases by Segment (\$ bn)</b>	<b>10</b>
	chain and independent purchases by primary segment	
	<b>2016 Restaurant Market Shares of Purchases</b>	<b>11</b>
	chain and independent purchase shares for fast food / fast casual and full service	
	<b>Independent Restaurant Market Growth</b>	<b>12</b>
	projected growth of independent restaurants versus all others by 2025	
	<b>The Independent Restaurant* Market (2016 estimates)</b>	<b>13</b>
	estimated independent restaurant units and purchases (2016)	
	<b>Unit Growth 2016-2025 (000)</b>	<b>14</b>
	restaurant unit growth by primary segment for chains, LLOs and others	

# Table of Contents Elements

<b>Current and Forecasted Industry Volume (\$ bn)</b> contracted versus non-contracted operator purchase growth; 2016 - 2025	<b>15</b>
<b>2016 Contract Volume by Segment (\$ bn)</b> operator segment shares of total contracted volume	<b>16</b>
<b>Contract Volume Growth by Segment (\$ bn)</b> contracted volume size and growth projections through 2025 by operator segment	<b>17</b>
<b>Operator Purchases by Major Segments (\$ bn)</b> size and growth of purchases for GPOs, Top 500 chains and all other; 2016 - 2025	<b>18</b>
<b>GPO: Structure and Definitions</b> definitions and examples of primary GPO types	<b>19</b>
<b>2016 Operator Purchases by Product Category</b> size and growth of primary product categories (frozen, refrigerated, shelf stable and non-food); 2016 - 2025	<b>20</b>
<b>Foodservice Distributor Sales (\$bn)</b> sales and growth by type of distributor; 2016 - 2025	<b>21</b>
<b>Analysis of Distribution Channel</b> comments / outlook for each type of distributor	<b>22</b>
<b>2016 Distributor Brand Sales by Type of Distributor (\$ bn)</b> distributor brand share by type of distributor	<b>23</b>
<b>2016 Operator Purchases by Brand Type</b> size and share of operator purchases: manufacturer, distributor and custom chain brands	<b>24</b>
<b>Forecasted Operator Purchased by Brand Type (\$ bn)</b> size and growth of operator brand purchases from 2016 - 2025; manufacturer, distributor and chain custom	<b>25</b>

# Table of Contents Elements

## II Top 5 Critical Strategic Issues

Pentallect's assessment of the Top 5 critical issues facing each of the primary go-to-market elements

<b>Independent Restaurants</b>	<b>27-28</b>
<b>Restaurant Chains</b>	<b>29</b>
<b>Top 25 FSMs</b>	<b>30</b>
<b>GPOs</b>	<b>31</b>
<b>Distributors</b>	<b>32-33</b>
<b>Manufacturer Coverage, Staffing and Compensation</b>	<b>34</b>
<b>Brokers</b>	<b>35-36</b>
<b>Critical Go-to-Market 2025: Options and Imperatives Summary</b>	<b>37</b>