

Soyfoods in Foodservice

Growth Opportunities in an Untapped Channel

A Multi-Client Study from

The **Hale** Group



Driven by changing demographics and lifestyles, consumers now demand the ultimate in convenience – food anytime, anywhere, prepared their way. As a result, foodservice sales have grown steadily, and have surpassed sales of retail food products for the first time in history.

At the same time, the soyfoods category has experienced tremendous growth driven by improved products, consumer desires for healthful foods and mainstream distribution.

Growth opportunities exist for those companies prepared and positioned to understand and serve the foodservice channel with soyfoods products, services and systems.



A new multi-client study from the experts in foodservice and soyfoods



About The Hale Group

The Hale Group is the leading strategy consulting firm dedicated to serving clients in the food and agribusiness industries.



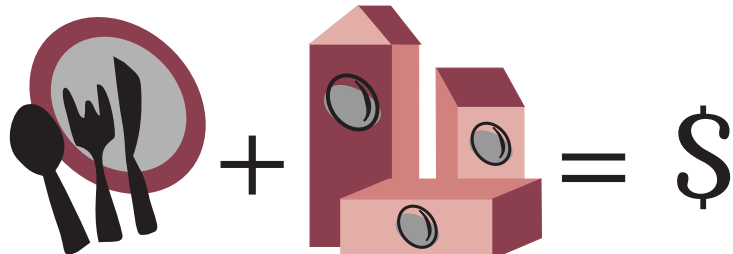
About Soyatech

Soyatech is a publishing, marketing research, and consulting firm specializing in delivering value-added information to the soybean, food, and feed industries.

Soyatech, the soy industry's ultimate industry resource, and **The Hale Group, Ltd.**, the premier foodservice industry management consulting company have joined together to provide the knowledge and strategic insight required to exploit the potential for soyfoods in foodservice through this important multi-client study.

Despite the phenomenal growth and attractive product and marketing opportunities that have occurred over the last 2-3 years with soyfoods, most efforts have focused on creating and developing opportunities within the retail segment. Industry players have not yet made significant inroads into the \$400 + billion foodservice channel. Why?

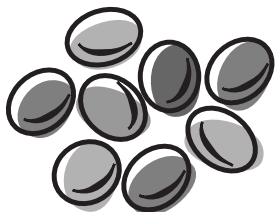
- Do the current products not fit the foodservice environment?
- Have past marketing efforts missed the mark in foodservice?
- Are there operational issues that have not been addressed?



Foodservice

Soyfoods

We believe that given the continued growth and further evolution of foodservice customer requirements and desires, there are some very attractive, yet under-developed, opportunities in this channel.



Growth opportunities . . .

Soyfoods in Foodservice

I. Understanding Foodservice — The Landscape

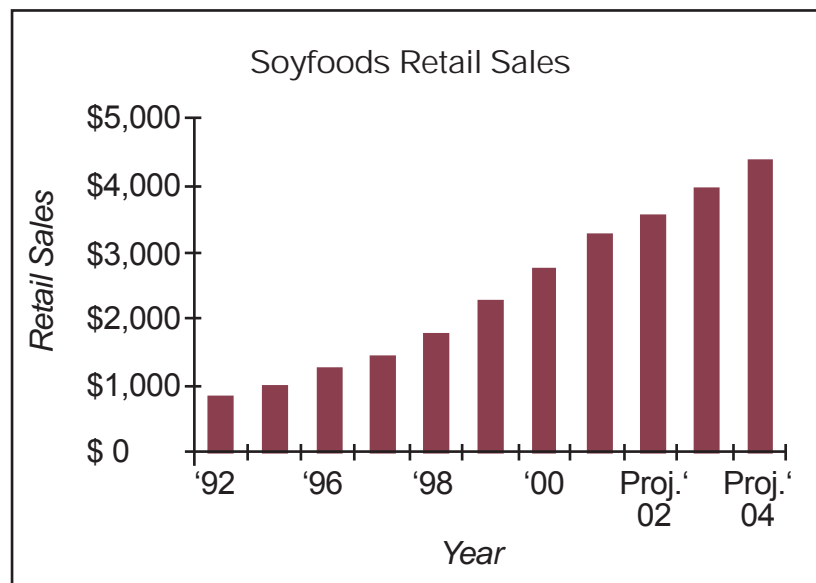
- The foodservice market size and structure, current and projected to 2010
 - 1 The multiple dimensions and dynamics of foodservice
 - Commercial and non-commercial segments – definitions and descriptions
 - Key accounts
 - Expectations of suppliers
 - Future expectations for growth
- Driving forces behind foodservice industry growth
- Foodservice distribution and its drivers
 - 1 Broadline and specialty distribution — size and growth trends
 - 1 Other distribution channels, e.g., clubs and system distributors
 - 1 Expectations of suppliers
- Industry outlook
- Soyfoods in foodservice: efforts to date
- Key success factors for manufacturers

II. Soyfoods: Situation Analysis

- Size and structure of the industry
- Key players and products
- Growth drivers
- Industry outlook

III. Soyfoods within Foodservice: Making It Happen

- Key requirements
- Product & packaging
- Segment prioritization
- Customized solutions
- Building demand: The marketing options
- Distribution choices
- Account strategies
- Go-to-market options



Key Take-Aways and Deliverables

- c Size and scope of the opportunity
- c Key success factors
- c Targets for sales
- c Strategic insight into how foodservice operates

Participants will receive:

- c A copy of the final report and backup data
- c An in-person presentation and strategy session is optional and under a separate fee

Target Audience

This study is essential for management, including sales and marketing executives within soyfoods manufacturing and other firms in, or considering entry into, the soyfoods category.

Order by May 1, 2003
and save \$3,000

Cost and Timing

The Soyfoods in Foodservice multi-client study provides real value by sharing proprietary research costs among study subscribers.

The prepublication price (paid by May 1, 2003) is \$6,500. After May 1, the price is \$9,500.

Anticipated delivery date is August 1, 2003

Subscribe

To subscribe to this multi-client study, Soyfoods in Foodservice, please complete and return the enclosed subscription agreement to:

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Soyfoods in Foodservice

Subscription Agreement

By execution of this agreement, the subscribing organization identified below purchases the subscription privileges described in this prospectus for the Soyfoods in Foodservice Multi-Client Study, offered by The Hale Group, Ltd. and SoyaTech. The cost of subscribing is \$9,500.

The results of this multi-client are for the sole use of the below designated subscriber organization and will not be released to others outside the organization without prior written approval from The Hale Group, Ltd. or SoyaTech.

The Hale Group, Ltd. and SoyaTech reserve the right to require a minimum number of subscribers before initiating the Soyfoods in Foodservice Multi-Client Study.

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For The Hale Group, Ltd. / SoyaTech

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Soyfoods in Foodservice

A Multi-Client Study Exploring Market Opportunities for Industry Participants
Prepared by The Hale Group, Ltd. & Soyatech, Inc.
August 2003

Table of Contents

Chapters:

- 1. Introduction**
- 2. Executive Summary**
- 3. US Foodservice Industry Overview**
 - 3.a The U.S. Foodservice Consumer
 - 3.b The U.S. Foodservice Operator
 - 3.c The U.S. Foodservice Distributor
 - 3.d U.S Soyfoods – A Brief Market Overview
- 4. Soyfoods in Foodservice – Primary Research Results**
 - 4.a Non-Users
 - 4.b Users
- 5. Foodservice Manufacturer Overview**
- 6. Summary Comments / Recommendations**
- 7. Soyfoods in Foodservice Tomorrow**

Appendix

Subject	Page
1. Introduction.....	2
The Study's Core Objectives	4
Study Objectives	5
Methodology	6
2. Executive Summary.....	8
Soyfoods in Foodservice: Estimated Market Size.....	9
Soyfoods in Foodservice: Sales by Category	10
Soyfoods in Foodservice: Size of the Opportunity by Segment.....	11
Soyfoods in Foodservice: Sales by Category	12
Soyfoods in Foodservice: Estimated Market Growth Potential.....	13

Soyfoods in Foodservice: Size of the Opportunity	14
Strategic Recommendations.....	15
Key Learnings: Operator Research.....	16
Key Learnings: Distributor Research.....	17
Marketing Activity	18
Key Learnings: Manufacturers	19
Gardenburger: A Case Study.....	21
Summary Findings	25
Recommendations	26
The Targeted Segments.....	27
Go-to-Market Strategies	29
The Upside Opportunity / Soyfoods in Foodservice.....	31
The Gatekeeper Factor	32
Soyfoods in Foodservice – Industry Lifecycle.....	33
The Current Market Situation.....	34
Soyfood Products in Foodservice – Current Situation3.....	35
Multiple Strategic Options.....	36
3. The U.S. Foodservice Industry Overview	37
The U.S. Foodservice Industry, 2003.....	38
U.S. Food Industry Structure	40
Foodservice Captures Share	41
U.S. Foodservice Industry	42
Restaurant Industry Statistics	43
The Foodservice Industry by Location	44
U.S. Foodservice Industry Forecast.....	45
3.a The U.S. Foodservice Consumer	46
The U.S. Foodservice Consumer	47
U.S. Population Growth 2000 – 2010	49
U.S. Consumer: Ethnicity Shifts Will Be Felt.....	50
U.S. Consumer – Affluent Consumers Put Their Kitchens on Ice	51
Spending On Food Away From Home	52
Today’s Consumer.....	53
Consumer Conundrums	54
Consumer Conundrums - Nutrition Contribution	56
Looking at Cooking – A Generational View.....	57
Consumer Trends	58
3.b The U.S. Foodservice Operator	59
The U.S. Foodservice Operator.....	60
The U.S. Foodservice Industry	62
2003 U.S. Foodservice Operator Structure.....	63
Commercial Segment – U.S. Foodservice	64
U.S. Growth is in Second Tier	65
U.S. Chain Restaurants Continue to Grow.....	66
Commercial Summary.....	67

Non-Commercial: Segment Growth 2010	69
Non- Commercial Segment	70
Contracted Opportunity	71
Non-Commercial Summary	72
The Big Get Bigger: Dominance of Chains	73
Restaurant Trends	74
3.c The U.S. Foodservice Distributor	79
The U.S. Foodservice Distributor.....	80
Influence / Role of the Distributor	81
Top 50 U.S. Broadline Distributors	83
U.S.: Concentration Continues	84
U.S.: Broadliners Own Growth	85
Foodservice Distribution Economics.....	86
New Menu Trends	87
Summary Key Issues: Foodservice	92
Fast Casual	94
Consumer Trends	95
Operator Trends	96
Restaurant Trends	97
What Do We Know For Sure?	98
3.d U.S Soyfoods – A Brief Market Overview.....	99
U.S. Soyfoods – Historic & Projected Soyfoods Sales, 1996-2002, Projected 2003-2006	100
Rapidly Growing Market Attracts Food Industry’s Major Players	103
Consumers Are Getting the Message.....	104
U.S. Soyfoods – 2002 Manufacturer & Retail Sales, Category Share & Growth ...	105
Hundreds of New Products Are Entering the Marketplace.....	107
Soy-based Meat Alternatives Overview	108
Soy-based Meat Alternatives – Historic Sales, 1992-2002	109
Soymilk Beverages Overview.....	112
U.S. Soymilk Sales Growth	114
Soymilk Beverages – Historic Sales, 1992-2002.....	115
Tofu Overview	117
Tofu – Historic Sales, 1992-2002	118
Conclusions	121
4. Soyfoods in Foodservice – Primary Research Results.....	123
Scope of Research.....	124
Structure of Interviews.....	125
Usage by Segment.....	126
Key Learnings: Usage	127
4.a Non-Users	130
Planned Menu Additions	131

Key Learnings.....	132
Future Demand.....	133
Key Learnings.....	134
Adding Soyfoods to the Menu	135
Demand Hurdles.....	136
4.b Users	138
Soyfood Usage Motivators	139
Why Soy on the Menu?	140
Future Growth in Soyfoods.....	141
What is Causing Soyfoods Growth?	142
Product Offerings.....	143
Soyfood Usage Hurdles	145
Key Learnings.....	147
Product Form Preferences	148
Flavoring Preferences.....	149
Key Learnings.....	150
Organic, Natural, or non-GMO Trends.....	151
Key Learnings.....	153
Soyfood / Protein Alternative Pricing	154
Customer Feedback.....	155
The Soyfoods Customer	156
Key Learnings.....	157
Future Demand.....	158
Soyfoods Suppliers	159
Branded vs. Operator Line	160
Key Learnings.....	161
Geographies.....	162
Supplier Selection Process	163
Key Learnings.....	164
Manufacturer Expectations.....	165
Key Learnings.....	166
Key Learnings from Users.....	167
Key Learnings from Non-Users	169
5. Foodservice Manufacturer Overview	170
Soyfood Manufacturers – An Overview	171
Importance of Foodservice to the Business	172
Market Focus	173
National Account Efforts	175
Go-to-Market Strategies in Place.....	176
Foodservice Products.....	177
Marketing Activity	180
Key Learnings – Manufacturers	181
6. Summary Comments and Recommendations.....	183
The Current Market	184

Challenges to Success	185
Barriers to Success	186
7. Soyfoods in Foodservice Tomorrow.....	187
Attractive Trends	188
Consumer Demands for Nutrition.....	189
Critical Success Factor.....	190
Target Segments Near Term	191
The Targeted Segments.....	192
Go-to-Market Strategies	194
Appendix – Retail / Foodservice Comparisons	196