
Who Eats Out Where:
*Identifying Consumer
Foodservice and Hospitality
Trends*

2nd edition

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Catering consumer expenditure: per capita trends 2003-2009

Table: 2.19

US\$ per capita/% change

| | 2003 | 2004 | 2005 | 2006 | 2007 | 2008 | 2009 | % change 2003-2009 |
|------------------|---------|---------|---------|---------|---------|---------|---------|-----------------------|
| Argentina | 124.0 | 147.2 | 171.6 | 192.2 | 228.4 | 276.7 | 255.4 | 106.0 |
| Australia | 974.8 | 1,170.8 | 1,252.9 | 1,282.9 | 1,493.2 | 1,507.5 | 1,431.0 | 46.8 |
| Austria | 1,405.2 | 1,572.5 | 1,570.5 | 1,667.3 | 1,901.7 | 2,151.6 | 2,007.1 | 42.8 |
| Belgium | 781.6 | 885.7 | 912.4 | 950.9 | 1,097.7 | 1,246.5 | 1,172.3 | 50.0 |
| Brazil | 39.0 | 44.9 | 59.2 | 71.5 | 87.4 | 102.8 | 100.9 | 158.5 |
| Bulgaria | 133.8 | 174.5 | 203.7 | 222.5 | 297.9 | 367.6 | 333.4 | 149.1 |
| Canada | 946.5 | 1,059.9 | 1,174.0 | 1,317.7 | 1,464.9 | 1,519.9 | 1,404.5 | 48.4 |
| Chile | 147.7 | 176.1 | 205.1 | 232.8 | 260.4 | 291.0 | 276.6 | 87.3 |
| China | 35.0 | 43.6 | 49.5 | 58.5 | 66.7 | 84.3 | 95.2 | 171.9 |
| Colombia | 67.1 | 82.6 | 101.5 | 110.2 | 140.2 | 160.2 | 151.3 | 125.3 |
| Czech Republic | 205.5 | 253.0 | 296.0 | 364.7 | 427.4 | 530.0 | 493.9 | 140.4 |
| Denmark | 810.5 | 938.3 | 1,001.7 | 1,086.8 | 1,387.5 | 1,755.3 | 1,647.9 | 103.3 |
| Egypt | 7.0 | 7.3 | 8.4 | 9.0 | 11.1 | 13.7 | 16.2 | 130.3 |
| Finland | 931.5 | 1,095.5 | 1,160.8 | 1,221.7 | 1,401.2 | 1,545.7 | 1,398.1 | 50.1 |
| France | 843.3 | 945.0 | 973.7 | 1,019.8 | 1,152.4 | 1,237.3 | 1,175.6 | 39.4 |
| Germany | 766.8 | 855.1 | 870.4 | 907.5 | 1,043.2 | 1,145.2 | 1,070.9 | 39.7 |
| Greece | 1,419.2 | 1,633.9 | 1,807.6 | 1,960.4 | 2,169.1 | 2,473.2 | 2,279.8 | 60.6 |
| Hong Kong, China | 1,002.0 | 1,084.1 | 1,178.1 | 1,283.1 | 1,390.7 | 1,422.2 | 1,374.3 | 37.2 |
| Hungary | 144.5 | 181.7 | 197.2 | 197.9 | 250.1 | 279.7 | 241.0 | 66.7 |
| India | 6.5 | 8.1 | 9.9 | 11.7 | 14.7 | 16.1 | 16.2 | 150.6 |
| Indonesia | 30.7 | 33.5 | 39.1 | 46.0 | 57.6 | 68.0 | 71.6 | 133.5 |
| Ireland | 2,315.1 | 2,563.5 | 2,704.6 | 2,803.8 | 3,262.9 | 3,338.3 | 2,825.6 | 22.1 |
| Israel | 280.0 | 309.3 | 311.8 | 320.2 | 370.8 | 451.6 | 420.2 | 50.1 |
| Italy | 1,138.8 | 1,292.3 | 1,315.1 | 1,393.9 | 1,587.8 | 1,744.2 | 1,598.4 | 40.4 |
| Japan | 1,229.9 | 1,330.1 | 1,351.8 | 1,297.0 | 1,317.4 | 1,516.3 | 1,617.3 | 31.5 |
| Malaysia | 204.3 | 230.1 | 258.0 | 284.2 | 324.6 | 369.0 | 342.8 | 67.8 |
| Mexico | 133.1 | 134.2 | 144.1 | 148.8 | 153.4 | 154.0 | 129.5 | -2.8 |
| Morocco | 21.4 | 23.8 | 24.2 | 26.0 | 30.1 | 36.1 | 36.8 | 72.4 |
| Netherlands | 734.1 | 810.8 | 828.1 | 868.7 | 1,000.3 | 1,037.9 | 974.0 | 32.7 |
| New Zealand | 787.7 | 935.1 | 1,065.6 | 1,034.4 | 1,216.2 | 1,177.8 | 1,062.2 | 34.9 |
| Norway | 1,107.3 | 1,169.0 | 1,265.6 | 1,394.1 | 1,669.1 | 1,838.6 | 1,641.2 | 48.2 |
| Philippines | 32.4 | 34.8 | 39.2 | 46.2 | 55.1 | 64.6 | 63.3 | 95.7 |
| Poland | 91.8 | 101.0 | 117.5 | 128.2 | 150.1 | 185.4 | 146.1 | 59.1 |
| Portugal | 881.2 | 1,027.9 | 1,067.0 | 1,119.9 | 1,274.8 | 1,415.9 | 1,309.1 | 48.6 |
| Romania | 38.4 | 43.1 | 89.2 | 115.9 | 152.6 | 183.7 | 124.8 | 224.8 |
| Russia | 42.7 | 67.6 | 72.2 | 81.7 | 120.9 | 156.1 | 134.6 | 215.3 |
| Saudi Arabia | 90.6 | 94.7 | 100.3 | 111.4 | 129.6 | 148.5 | 158.8 | 75.4 |
| Singapore | 755.0 | 843.4 | 953.9 | 1,078.0 | 1,233.2 | 1,387.2 | 1,232.3 | 63.2 |
| Slovakia | 311.8 | 354.6 | 390.7 | 471.4 | 531.1 | 587.1 | 575.9 | 84.7 |
| South Africa | 46.6 | 59.8 | 68.1 | 71.0 | 77.4 | 73.2 | 73.7 | 58.1 |
| South Korea | 510.7 | 540.3 | 623.4 | 691.0 | 761.5 | 685.2 | 601.9 | 17.9 |
| Spain | 2,023.6 | 2,397.8 | 2,580.0 | 2,787.3 | 3,194.6 | 3,462.7 | 3,115.1 | 53.9 |
| Sweden | 712.2 | 790.9 | 837.1 | 904.6 | 1,046.3 | 1,159.1 | 985.2 | 38.3 |
| Switzerland | 1,813.5 | 2,046.0 | 1,976.2 | 2,136.1 | 2,328.0 | 2,559.2 | 2,346.0 | 29.4 |
| Taiwan | 340.5 | 370.6 | 395.6 | 401.1 | 406.9 | 427.2 | 404.9 | 18.9 |
| Thailand | 97.0 | 102.2 | 105.7 | 115.5 | 128.9 | 142.2 | 133.5 | 37.5 |
| Turkey | 187.9 | 250.5 | 302.2 | 331.0 | 397.9 | 434.5 | 398.3 | 111.9 |
| Ukraine | 9.5 | 13.7 | 20.2 | 26.5 | 35.9 | 48.2 | 34.6 | 264.0 |
| United Kingdom | 1,891.0 | 2,228.6 | 2,259.6 | 2,320.0 | 2,580.5 | 2,419.8 | 1,870.4 | -1.1 |
| USA | 1,397.9 | 1,467.4 | 1,540.5 | 1,624.2 | 1,682.3 | 1,723.0 | 1,694.6 | 21.2 |
| Venezuela | 137.6 | 162.3 | 194.2 | 243.4 | 329.7 | 438.0 | 541.5 | 293.7 |
| Vietnam | 23.6 | 27.0 | 30.4 | 33.9 | 40.1 | 52.8 | 55.1 | 133.8 |

Source: National statistical offices/OECD/Eurostat/Euromonitor International

Consumer Foodservice

Consumer foodservice: total number of outlets 2003-2009

Table: 3.1

Number/% change

| | 2003 | 2004 | 2005 | 2006 | 2007 | 2008 | 2009 | % change 2003-2009 |
|------------------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------------------|
| Argentina | 55,885 | 55,720 | 57,675 | 57,635 | 57,670 | 57,548 | 57,163 | 2.3 |
| Australia | 56,824 | 58,256 | 59,530 | 60,573 | 61,371 | 62,100 | 62,531 | 10.0 |
| Austria | 42,785 | 43,463 | 44,159 | 44,849 | 45,596 | 45,462 | 45,266 | 5.8 |
| Belgium | 43,765 | 43,850 | 43,920 | 43,908 | 43,739 | 43,019 | 40,257 | -8.0 |
| Brazil | 821,225 | 842,063 | 862,509 | 878,459 | 895,806 | 915,609 | 931,017 | 13.4 |
| Bulgaria | 34,736 | 36,215 | 36,857 | 36,858 | 36,570 | 36,073 | 36,055 | 3.8 |
| Canada | 71,493 | 72,813 | 73,626 | 74,643 | 75,375 | 75,669 | 74,818 | 4.7 |
| Chile | 19,217 | 19,491 | 19,987 | 20,390 | 20,624 | 20,626 | 20,490 | 6.6 |
| China | 3,315,735 | 3,702,529 | 4,171,078 | 4,612,142 | 4,963,808 | 5,300,936 | 5,572,974 | 68.1 |
| Colombia | 34,823 | 44,286 | 47,879 | 50,213 | 52,897 | 54,365 | 54,527 | 56.6 |
| Czech Republic | 35,620 | 37,647 | 38,810 | 41,145 | 39,716 | 39,761 | 39,473 | 10.8 |
| Denmark | 11,699 | 11,779 | 11,907 | 12,045 | 12,199 | 12,252 | 12,212 | 4.4 |
| Egypt | 49,612 | 49,587 | 49,817 | 49,905 | 49,934 | 50,270 | 50,603 | 2.0 |
| Finland | 12,370 | 12,393 | 12,448 | 12,423 | 12,368 | 12,304 | 12,228 | -1.1 |
| France | 152,201 | 153,020 | 152,939 | 152,792 | 152,843 | 150,855 | 145,509 | -4.4 |
| Germany | 173,931 | 171,030 | 169,549 | 169,306 | 166,978 | 164,954 | 162,592 | -6.5 |
| Greece | 63,832 | 64,336 | 64,646 | 64,775 | 65,239 | 65,476 | 64,569 | 1.2 |
| Hong Kong, China | 12,361 | 12,721 | 13,107 | 13,510 | 13,898 | 14,206 | 14,179 | 14.7 |
| Hungary | 34,445 | 35,423 | 36,017 | 36,451 | 36,727 | 35,690 | 32,853 | -4.6 |
| India | 1,017,917 | 1,135,878 | 1,267,338 | 1,393,708 | 1,513,065 | 1,628,969 | 1,748,003 | 71.7 |
| Indonesia | 161,350 | 167,587 | 174,892 | 181,397 | 188,074 | 191,856 | 194,896 | 20.8 |
| Ireland | 15,446 | 15,807 | 16,254 | 16,726 | 16,967 | 16,918 | 16,682 | 8.0 |
| Israel | 10,107 | 10,769 | 11,496 | 12,100 | 12,705 | 13,278 | 13,697 | 35.5 |
| Italy | 261,827 | 271,324 | 280,944 | 299,208 | 305,376 | 309,866 | 307,697 | 17.5 |
| Japan | 826,673 | 818,179 | 813,620 | 807,743 | 794,773 | 778,429 | 757,249 | -8.4 |
| Malaysia | 22,687 | 23,849 | 24,981 | 25,966 | 27,249 | 28,187 | 28,610 | 26.1 |
| Mexico | 540,951 | 549,671 | 566,282 | 581,525 | 613,275 | 634,828 | 592,175 | 9.5 |
| Morocco | 25,712 | 26,109 | 26,035 | 26,178 | 26,362 | 26,564 | 26,726 | 3.9 |
| Netherlands | 39,862 | 39,934 | 40,080 | 40,216 | 40,598 | 40,440 | 40,146 | 0.7 |
| New Zealand | 15,906 | 16,650 | 17,380 | 18,128 | 18,680 | 19,033 | 19,287 | 21.3 |
| Norway | 11,794 | 11,943 | 12,067 | 12,117 | 12,223 | 12,273 | 12,275 | 4.1 |
| Philippines | 65,059 | 66,670 | 69,428 | 72,198 | 75,450 | 77,121 | 78,258 | 20.3 |
| Poland | 79,970 | 83,323 | 87,176 | 91,320 | 95,276 | 97,900 | 96,656 | 20.9 |
| Portugal | 79,278 | 78,825 | 78,916 | 78,902 | 80,383 | 80,228 | 79,308 | 0.0 |
| Romania | 11,220 | 13,613 | 15,740 | 17,412 | 18,861 | 20,204 | 19,978 | 78.1 |
| Russia | 49,264 | 50,654 | 52,323 | 53,767 | 54,815 | 55,552 | 54,729 | 11.1 |
| Saudi Arabia | 12,760 | 13,235 | 14,321 | 14,800 | 15,337 | 15,851 | 16,117 | 26.3 |
| Singapore | 21,710 | 22,654 | 23,385 | 24,318 | 24,969 | 24,902 | 25,294 | 16.5 |
| Slovakia | 15,638 | 16,521 | 17,098 | 17,627 | 17,802 | 17,994 | 17,933 | 14.7 |
| South Africa | 62,008 | 67,850 | 72,448 | 76,450 | 81,569 | 85,657 | 88,887 | 43.3 |
| South Korea | 562,652 | 574,173 | 585,080 | 581,190 | 594,126 | 586,160 | 576,975 | 2.5 |
| Spain | 240,827 | 252,468 | 250,331 | 253,449 | 256,270 | 257,897 | 247,331 | 2.7 |
| Sweden | 21,901 | 22,114 | 22,364 | 22,755 | 23,325 | 23,478 | 23,573 | 7.6 |
| Switzerland | 25,271 | 25,689 | 25,812 | 25,804 | 25,885 | 26,065 | 26,054 | 3.1 |
| Taiwan | 165,019 | 168,886 | 174,150 | 179,186 | 183,282 | 185,568 | 186,774 | 13.2 |
| Thailand | 96,451 | 100,207 | 104,168 | 108,884 | 113,395 | 116,875 | 119,581 | 24.0 |
| Turkey | 107,670 | 108,491 | 109,974 | 112,167 | 114,316 | 116,597 | 104,660 | -2.8 |
| Ukraine | 52,182 | 52,594 | 54,543 | 55,496 | 54,040 | 52,415 | 50,579 | -3.1 |
| United Kingdom | 166,726 | 169,234 | 171,414 | 173,786 | 173,676 | 169,750 | 165,845 | -0.5 |
| USA | 550,243 | 563,587 | 577,384 | 589,214 | 600,849 | 602,315 | 604,717 | 9.9 |
| Venezuela | 36,264 | 36,911 | 38,175 | 38,990 | 39,495 | 39,716 | 39,751 | 9.6 |
| Vietnam | 419,107 | 445,927 | 471,477 | 496,757 | 514,891 | 528,629 | 536,206 | 27.9 |

Source: Euromonitor International from Trade Sources

Full-Service Restaurants

Full-service restaurants: total number of outlets 2003-2009

Table: 3.15

Number/% change

| | 2003 | 2004 | 2005 | 2006 | 2007 | 2008 | 2009 | % change 2003-2009 |
|------------------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------------------|
| Argentina | 24,907 | 24,926 | 25,678 | 25,745 | 25,743 | 25,769 | 25,545 | 2.6 |
| Australia | 21,234 | 21,406 | 21,582 | 21,777 | 21,895 | 22,030 | 22,070 | 3.9 |
| Austria | 16,283 | 16,580 | 16,943 | 17,307 | 17,685 | 17,668 | 17,620 | 8.2 |
| Belgium | 21,214 | 21,417 | 21,629 | 21,986 | 22,150 | 22,160 | 20,888 | -1.5 |
| Brazil | 56,968 | 57,667 | 58,406 | 59,267 | 60,074 | 60,796 | 61,408 | 7.8 |
| Bulgaria | 8,661 | 9,362 | 9,485 | 9,579 | 9,724 | 9,763 | 9,867 | 13.9 |
| Canada | 24,498 | 25,121 | 25,030 | 25,015 | 24,858 | 24,964 | 24,448 | -0.2 |
| Chile | 3,798 | 3,786 | 3,866 | 3,923 | 3,985 | 3,974 | 3,892 | 2.5 |
| China | 2,310,682 | 2,619,763 | 3,012,854 | 3,374,517 | 3,644,714 | 3,900,365 | 4,095,764 | 77.3 |
| Colombia | 12,642 | 16,244 | 19,181 | 20,950 | 23,035 | 24,240 | 24,326 | 92.4 |
| Czech Republic | 7,325 | 7,395 | 7,448 | 7,737 | 7,827 | 7,854 | 7,785 | 6.3 |
| Denmark | 3,336 | 3,376 | 3,423 | 3,469 | 3,505 | 3,511 | 3,472 | 4.1 |
| Egypt | 1,288 | 1,352 | 1,394 | 1,450 | 1,528 | 1,627 | 1,695 | 31.6 |
| Finland | 3,303 | 3,347 | 3,439 | 3,517 | 3,619 | 3,682 | 3,688 | 11.7 |
| France | 92,939 | 93,233 | 93,268 | 93,613 | 93,902 | 92,795 | 88,759 | -4.5 |
| Germany | 74,829 | 73,583 | 72,823 | 73,002 | 71,916 | 70,887 | 69,900 | -6.6 |
| Greece | 22,733 | 22,906 | 23,047 | 23,208 | 23,313 | 23,395 | 22,700 | -0.1 |
| Hong Kong, China | 7,783 | 8,030 | 8,245 | 8,413 | 8,534 | 8,672 | 8,560 | 10.0 |
| Hungary | 8,760 | 8,858 | 8,957 | 8,981 | 8,902 | 8,641 | 7,354 | -16.1 |
| India | 410,856 | 438,996 | 469,351 | 503,905 | 540,903 | 581,357 | 603,207 | 46.8 |
| Indonesia | 82,062 | 85,801 | 89,718 | 92,508 | 94,911 | 96,474 | 97,742 | 19.1 |
| Ireland | 3,064 | 3,062 | 3,106 | 3,152 | 3,189 | 3,214 | 3,200 | 4.4 |
| Israel | 3,075 | 3,113 | 3,155 | 3,197 | 3,251 | 3,295 | 3,204 | 4.2 |
| Italy | 96,190 | 99,551 | 103,416 | 107,204 | 110,376 | 112,659 | 111,620 | 16.0 |
| Japan | 327,279 | 323,576 | 321,462 | 317,006 | 312,122 | 305,796 | 296,178 | -9.5 |
| Malaysia | 7,697 | 8,106 | 8,577 | 9,010 | 9,434 | 9,717 | 9,742 | 26.6 |
| Mexico | 171,609 | 172,589 | 176,637 | 180,539 | 183,898 | 187,380 | 178,300 | 3.9 |
| Morocco | 957 | 979 | 997 | 1,020 | 1,070 | 1,109 | 1,133 | 18.4 |
| Netherlands | 12,308 | 12,380 | 12,535 | 12,640 | 12,773 | 12,758 | 12,667 | 2.9 |
| New Zealand | 5,208 | 5,375 | 5,524 | 5,680 | 5,796 | 5,878 | 5,905 | 13.4 |
| Norway | 3,553 | 3,557 | 3,568 | 3,612 | 3,649 | 3,663 | 3,676 | 3.5 |
| Philippines | 17,097 | 17,509 | 17,977 | 18,404 | 18,865 | 18,669 | 18,291 | 7.0 |
| Poland | 6,332 | 6,656 | 7,036 | 7,450 | 7,935 | 8,352 | 7,773 | 22.8 |
| Portugal | 26,629 | 26,308 | 26,269 | 26,238 | 26,601 | 26,516 | 26,027 | -2.3 |
| Romania | 3,440 | 4,007 | 4,566 | 5,012 | 5,490 | 5,934 | 5,849 | 70.0 |
| Russia | 7,077 | 7,139 | 7,227 | 7,316 | 7,376 | 7,433 | 7,259 | 2.6 |
| Saudi Arabia | 945 | 970 | 1,018 | 1,053 | 1,095 | 1,153 | 1,184 | 25.3 |
| Singapore | 1,219 | 1,257 | 1,313 | 1,356 | 1,410 | 1,459 | 1,503 | 23.3 |
| Slovakia | 3,910 | 3,953 | 3,992 | 4,034 | 4,071 | 4,106 | 4,106 | 5.0 |
| South Africa | 6,564 | 7,306 | 7,963 | 8,594 | 9,274 | 9,842 | 10,221 | 55.7 |
| South Korea | 347,510 | 350,004 | 350,575 | 350,040 | 366,124 | 360,659 | 353,195 | 1.6 |
| Spain | 64,610 | 70,144 | 70,482 | 70,789 | 71,022 | 70,550 | 68,452 | 5.9 |
| Sweden | 12,475 | 12,397 | 12,608 | 12,935 | 13,262 | 13,388 | 13,543 | 8.6 |
| Switzerland | 17,641 | 17,837 | 17,873 | 17,753 | 17,738 | 17,722 | 17,678 | 0.2 |
| Taiwan | 6,969 | 7,030 | 7,088 | 7,258 | 7,420 | 7,491 | 7,516 | 7.8 |
| Thailand | 7,724 | 8,013 | 8,318 | 8,652 | 9,157 | 9,513 | 9,725 | 25.9 |
| Turkey | 39,923 | 40,090 | 40,649 | 41,282 | 42,005 | 42,821 | 39,451 | -1.2 |
| Ukraine | 1,569 | 1,664 | 1,772 | 1,873 | 1,950 | 2,015 | 2,046 | 30.4 |
| United Kingdom | 31,204 | 31,658 | 31,931 | 32,389 | 32,886 | 32,833 | 32,516 | 4.2 |
| USA | 218,435 | 225,393 | 230,917 | 234,407 | 239,132 | 237,392 | 229,949 | 5.3 |
| Venezuela | 17,004 | 17,091 | 17,448 | 17,592 | 17,665 | 17,692 | 17,655 | 3.8 |
| Vietnam | 57,467 | 62,868 | 67,746 | 71,277 | 74,781 | 78,218 | 79,211 | 37.8 |

Source: Euromonitor International from Trade Sources

Street Stalls/Kiosks

Street stalls/kiosks: total number of outlets 2003-2009

Table: 3.34

Number/% change

| | 2003 | 2004 | 2005 | 2006 | 2007 | 2008 | 2009 | % change 2003-2009 |
|------------------|---------|---------|---------|---------|---------|---------|-----------|-----------------------|
| Argentina | 4,025 | 4,018 | 3,930 | 3,910 | 3,898 | 3,910 | 3,930 | -2.4 |
| Australia | 9,207 | 9,412 | 9,551 | 9,682 | 9,791 | 9,885 | 9,965 | 8.2 |
| Austria | 3,331 | 3,398 | 3,435 | 3,499 | 3,573 | 3,502 | 3,414 | 2.5 |
| Belgium | 2,884 | 2,866 | 2,823 | 2,714 | 2,539 | 2,163 | 1,745 | -39.5 |
| Brazil | 230,376 | 244,688 | 259,920 | 270,871 | 281,742 | 292,772 | 303,476 | 31.7 |
| Bulgaria | 2,371 | 2,430 | 2,475 | 2,445 | 2,365 | 2,028 | 1,975 | -16.7 |
| Canada | 3,046 | 3,099 | 3,161 | 3,224 | 3,278 | 3,330 | 3,340 | 9.7 |
| Chile | 4,669 | 4,762 | 4,881 | 4,896 | 4,919 | 4,934 | 4,958 | 6.2 |
| China | 201,118 | 211,020 | 223,081 | 239,646 | 258,904 | 280,046 | 299,263 | 48.8 |
| Colombia | 13,839 | 18,320 | 17,801 | 17,465 | 17,124 | 16,854 | 16,681 | 20.5 |
| Czech Republic | 7,567 | 7,510 | 7,460 | 7,510 | 7,276 | 7,400 | 7,380 | -2.5 |
| Denmark | 394 | 389 | 386 | 381 | 380 | 385 | 381 | -3.3 |
| Egypt | 2,450 | 2,500 | 2,575 | 2,650 | 2,742 | 2,808 | 2,892 | 18.0 |
| Finland | 1,112 | 1,108 | 1,087 | 1,077 | 1,066 | 1,055 | 1,046 | -5.9 |
| France | 3,842 | 3,916 | 3,954 | 4,045 | 4,161 | 4,252 | 4,346 | 13.1 |
| Germany | 16,223 | 15,990 | 15,931 | 16,011 | 15,672 | 15,460 | 15,169 | -6.5 |
| Greece | 2,450 | 2,486 | 2,539 | 2,549 | 2,562 | 2,553 | 2,548 | 4.0 |
| Hong Kong, China | 1,438 | 1,422 | 1,435 | 1,450 | 1,465 | 1,470 | 1,479 | 2.9 |
| Hungary | 3,909 | 4,368 | 4,644 | 5,130 | 5,261 | 5,071 | 4,810 | 23.0 |
| India | 518,722 | 599,345 | 690,929 | 773,838 | 847,300 | 915,130 | 1,006,708 | 94.1 |
| Indonesia | 74,051 | 76,095 | 78,992 | 82,310 | 86,091 | 87,851 | 89,231 | 20.5 |
| Ireland | 437 | 440 | 432 | 430 | 434 | 438 | 435 | -0.5 |
| Israel | 2,147 | 2,251 | 2,370 | 2,488 | 2,613 | 2,751 | 2,923 | 36.1 |
| Italy | 7,476 | 7,672 | 7,713 | 7,769 | 7,908 | 7,864 | 7,739 | 3.5 |
| Japan | 3,969 | 3,975 | 3,902 | 3,833 | 3,830 | 3,817 | 3,707 | -6.6 |
| Malaysia | 9,128 | 9,509 | 9,816 | 10,114 | 10,417 | 10,645 | 10,756 | 17.8 |
| Mexico | 325,449 | 325,970 | 335,889 | 343,760 | 370,295 | 386,056 | 352,099 | 8.2 |
| Morocco | 1,360 | 1,500 | 1,100 | 1,060 | 1,040 | 1,020 | 1,030 | -24.3 |
| Netherlands | 2,377 | 2,397 | 2,431 | 2,459 | 2,483 | 2,483 | 2,482 | 4.4 |
| New Zealand | 3,708 | 3,846 | 3,954 | 4,048 | 4,143 | 4,213 | 4,269 | 15.1 |
| Norway | 220 | 211 | 205 | 203 | 200 | 197 | 195 | -11.4 |
| Philippines | 28,343 | 28,933 | 30,486 | 32,006 | 33,930 | 35,691 | 36,923 | 30.3 |
| Poland | 23,713 | 24,707 | 25,777 | 26,923 | 28,024 | 28,889 | 29,187 | 23.1 |
| Portugal | 4,463 | 4,441 | 4,490 | 4,461 | 4,477 | 4,470 | 4,458 | -0.1 |
| Romania | 2,715 | 3,930 | 4,973 | 5,701 | 6,303 | 6,854 | 6,794 | 150.2 |
| Russia | 14,348 | 14,560 | 14,735 | 14,925 | 14,991 | 14,982 | 14,680 | 2.3 |
| Saudi Arabia | 502 | 535 | 562 | 579 | 598 | 620 | 650 | 29.5 |
| Singapore | 18,381 | 19,125 | 19,730 | 20,515 | 21,001 | 20,769 | 20,987 | 14.2 |
| Slovakia | 3,145 | 3,118 | 3,321 | 3,476 | 3,515 | 3,544 | 3,531 | 12.3 |
| South Africa | 41,156 | 45,359 | 48,582 | 51,014 | 54,355 | 57,075 | 59,360 | 44.2 |
| South Korea | 19,553 | 20,010 | 21,540 | 21,571 | 21,526 | 21,371 | 20,671 | 5.7 |
| Spain | 1,525 | 1,525 | 1,512 | 1,547 | 1,573 | 1,572 | 1,571 | 3.0 |
| Sweden | 1,014 | 1,026 | 998 | 922 | 909 | 902 | 909 | -10.4 |
| Switzerland | 581 | 596 | 598 | 603 | 606 | 600 | 596 | 2.6 |
| Taiwan | 136,910 | 139,503 | 143,821 | 147,965 | 151,794 | 153,794 | 155,271 | 13.4 |
| Thailand | 77,033 | 79,231 | 81,279 | 84,256 | 86,825 | 88,483 | 89,941 | 16.8 |
| Turkey | 5,023 | 5,078 | 5,128 | 5,219 | 5,361 | 5,448 | 5,432 | 8.1 |
| Ukraine | 10,195 | 10,999 | 12,005 | 11,960 | 11,747 | 11,499 | 11,624 | 14.0 |
| United Kingdom | 15,520 | 15,993 | 16,228 | 16,330 | 16,511 | 16,222 | 15,914 | 2.5 |
| USA | 37,180 | 37,371 | 37,967 | 39,314 | 40,061 | 40,109 | 40,911 | 10.0 |
| Venezuela | 14,387 | 14,785 | 15,450 | 15,979 | 16,281 | 16,383 | 16,429 | 14.2 |
| Vietnam | 346,559 | 366,416 | 384,930 | 404,000 | 416,135 | 424,161 | 428,790 | 23.7 |

Source: Euromonitor International from Trade Sources

Chained consumer foodservice as a % of the total number of consumer foodservice outlets: country rankings 2009

Table: 4.5

% of total number of consumer foodservice outlets

| Rank | Country | 2009 |
|------|------------------|------|
| 1 | Canada | 42.9 |
| 2 | USA | 36.9 |
| 3 | Taiwan | 34.3 |
| 4 | Norway | 31.1 |
| 5 | United Kingdom | 30.2 |
| 6 | Finland | 28.2 |
| 7 | Saudi Arabia | 22.6 |
| 8 | Thailand | 21.4 |
| 9 | Australia | 20.7 |
| 10 | Hong Kong, China | 19.7 |
| 11 | Japan | 19.2 |
| 12 | Philippines | 19.1 |
| 13 | South Korea | 17.6 |
| 14 | Malaysia | 16.2 |
| 15 | Singapore | 16.1 |
| 16 | Russia | 16.1 |
| 17 | Ireland | 15.9 |
| 18 | Sweden | 15.1 |
| 19 | New Zealand | 15.1 |
| 20 | Israel | 13.7 |
| 21 | Hungary | 13.2 |
| 22 | Argentina | 11.4 |
| 23 | Denmark | 11.1 |
| 24 | Romania | 9.2 |
| 25 | Chile | 8.9 |
| 26 | Netherlands | 8.9 |
| 27 | Germany | 8.3 |
| 28 | Switzerland | 8.3 |
| 29 | South Africa | 7.3 |
| 30 | Indonesia | 6.2 |
| 31 | France | 5.7 |
| 32 | Venezuela | 5.5 |
| 33 | Colombia | 4.9 |
| 34 | Ukraine | 4.1 |
| 35 | Austria | 4.0 |
| 36 | Mexico | 3.9 |
| 37 | Poland | 3.8 |
| 38 | Slovakia | 3.7 |
| 39 | Greece | 3.3 |
| 40 | Spain | 2.9 |
| 41 | Czech Republic | 2.8 |
| 42 | Turkey | 2.8 |
| 43 | Egypt | 2.7 |
| 44 | Belgium | 2.5 |
| 45 | Portugal | 1.8 |
| 46 | Italy | 1.6 |
| 47 | Brazil | 1.3 |
| 48 | Morocco | 1.3 |
| 49 | Bulgaria | 1.2 |
| 50 | China | 1.2 |
| 51 | India | 0.4 |
| 52 | Vietnam | 0.3 |

Source: Euromonitor International from Trade Sources

Chained consumer foodservice as a % of total consumer foodservice sales: country rankings 2009

Table: 4.6

% of total consumer foodservice sales

| Rank | Country | 2009 |
|------|------------------|------|
| 1 | Canada | 58.1 |
| 2 | USA | 51.9 |
| 3 | Japan | 43.6 |
| 4 | Finland | 38.8 |
| 5 | United Kingdom | 38.7 |
| 6 | Philippines | 37.1 |
| 7 | Taiwan | 34.2 |
| 8 | Saudi Arabia | 33.5 |
| 9 | Russia | 32.8 |
| 10 | Australia | 32.5 |
| 11 | Germany | 30.7 |
| 12 | Chile | 30.7 |
| 13 | South Korea | 30.6 |
| 14 | South Africa | 30.5 |
| 15 | Norway | 30.4 |
| 16 | Singapore | 29.1 |
| 17 | Hong Kong, China | 28.8 |
| 18 | Malaysia | 28.3 |
| 19 | France | 26.8 |
| 20 | Ireland | 25.5 |
| 21 | Israel | 25.2 |
| 22 | Denmark | 24.6 |
| 23 | Switzerland | 24.4 |
| 24 | Sweden | 22.7 |
| 25 | Netherlands | 21.5 |
| 26 | Thailand | 21.4 |
| 27 | New Zealand | 21.2 |
| 28 | Romania | 17.1 |
| 29 | Hungary | 15.5 |
| 30 | Venezuela | 15.3 |
| 31 | Poland | 14.7 |
| 32 | Egypt | 14.1 |
| 33 | Argentina | 13.9 |
| 34 | Austria | 13.3 |
| 35 | Mexico | 13.0 |
| 36 | Czech Republic | 13.0 |
| 37 | Belgium | 12.2 |
| 38 | Portugal | 9.4 |
| 39 | Greece | 9.2 |
| 40 | China | 7.8 |
| 41 | Colombia | 7.7 |
| 42 | Bulgaria | 7.6 |
| 43 | Turkey | 7.6 |
| 44 | Ukraine | 7.4 |
| 45 | Morocco | 6.8 |
| 46 | Italy | 6.5 |
| 47 | Indonesia | 6.4 |
| 48 | Slovakia | 6.0 |
| 49 | Spain | 5.1 |
| 50 | Brazil | 5.0 |
| 51 | India | 1.9 |
| 52 | Vietnam | 1.1 |

Source: Euromonitor International from Trade Sources

Retail locations as a % of total consumer foodservice sales: country rankings 2009

Table: 4.9

% of total consumer foodservice sales

| Rank | Country | 2009 |
|------|------------------|------|
| 1 | Singapore | 40.4 |
| 2 | Philippines | 39.8 |
| 3 | Indonesia | 36.2 |
| 4 | Saudi Arabia | 25.2 |
| 5 | Colombia | 24.4 |
| 6 | Thailand | 24.1 |
| 7 | Malaysia | 22.7 |
| 8 | Denmark | 22.5 |
| 9 | Russia | 21.1 |
| 10 | Turkey | 19.2 |
| 11 | New Zealand | 18.5 |
| 12 | South Africa | 18.4 |
| 13 | Finland | 18.0 |
| 14 | Taiwan | 17.8 |
| 15 | Switzerland | 17.4 |
| 16 | Australia | 15.4 |
| 17 | Chile | 14.8 |
| 18 | Israel | 14.4 |
| 19 | Japan | 14.1 |
| 20 | Ukraine | 13.5 |
| 21 | Hong Kong, China | 13.4 |
| 22 | Argentina | 12.9 |
| 23 | Czech Republic | 11.5 |
| 24 | Venezuela | 11.0 |
| 25 | China | 10.7 |
| 26 | Egypt | 10.5 |
| 27 | Portugal | 9.8 |
| 28 | South Korea | 9.8 |
| 29 | Mexico | 9.4 |
| 30 | Poland | 8.6 |
| 31 | Morocco | 8.5 |
| 32 | Netherlands | 8.3 |
| 33 | India | 8.2 |
| 34 | Hungary | 7.5 |
| 35 | Sweden | 7.3 |
| 36 | Brazil | 7.0 |
| 37 | Ireland | 6.7 |
| 38 | Canada | 6.7 |
| 39 | Slovakia | 6.5 |
| 40 | USA | 5.9 |
| 41 | Norway | 5.8 |
| 42 | Greece | 5.5 |
| 43 | Romania | 5.4 |
| 44 | France | 5.4 |
| 45 | Spain | 5.2 |
| 46 | Austria | 5.0 |
| 47 | United Kingdom | 4.7 |
| 48 | Italy | 3.9 |
| 49 | Belgium | 3.8 |
| 50 | Germany | 3.4 |
| 51 | Bulgaria | 2.6 |
| 52 | Vietnam | 2.1 |

Source: Euromonitor International from Trade Sources

Tourist accommodation locations as a % of total consumer foodservice sales: country rankings 2009

Table: 4.10

% of total consumer foodservice sales

| Rank | Country | 2009 |
|------|------------------|------|
| 1 | Egypt | 21.1 |
| 2 | Romania | 17.8 |
| 3 | Poland | 17.7 |
| 4 | Hungary | 17.1 |
| 5 | Switzerland | 16.1 |
| 6 | Sweden | 15.6 |
| 7 | Slovakia | 15.3 |
| 8 | Turkey | 14.1 |
| 9 | Bulgaria | 14.0 |
| 10 | Czech Republic | 12.3 |
| 11 | Italy | 10.5 |
| 12 | Canada | 10.3 |
| 13 | Argentina | 9.9 |
| 14 | Hong Kong, China | 9.2 |
| 15 | Greece | 8.5 |
| 16 | United Kingdom | 8.5 |
| 17 | Norway | 8.4 |
| 18 | South Africa | 8.0 |
| 19 | India | 7.7 |
| 20 | Australia | 7.5 |
| 21 | Saudi Arabia | 7.3 |
| 22 | France | 7.1 |
| 23 | Chile | 7.1 |
| 24 | Malaysia | 7.0 |
| 25 | Netherlands | 6.5 |
| 26 | New Zealand | 6.4 |
| 27 | Thailand | 6.2 |
| 28 | Spain | 6.1 |
| 29 | Germany | 5.4 |
| 30 | Taiwan | 5.4 |
| 31 | Morocco | 5.2 |
| 32 | Finland | 5.2 |
| 33 | Brazil | 5.1 |
| 34 | Belgium | 5.0 |
| 35 | Colombia | 5.0 |
| 36 | Ireland | 4.9 |
| 37 | Japan | 4.7 |
| 38 | Ukraine | 4.4 |
| 39 | Denmark | 4.4 |
| 40 | China | 4.2 |
| 41 | Russia | 4.1 |
| 42 | Indonesia | 4.0 |
| 43 | Austria | 3.7 |
| 44 | Philippines | 3.5 |
| 45 | Singapore | 3.5 |
| 46 | USA | 3.2 |
| 47 | Vietnam | 3.0 |
| 48 | Portugal | 2.5 |
| 49 | Mexico | 2.5 |
| 50 | South Korea | 2.0 |
| 51 | Israel | 0.7 |
| 52 | Venezuela | 0.3 |

Source: Euromonitor International from Trade Sources

India

Socio-economic Parameters

India: Selected socio-economic parameters 2003-2009

Table: 5.426

As stated

| | 2003 | 2004 | 2005 | 2006 | 2007 | 2008 | 2009 |
|--|-------------|-------------|-------------|-------------|-------------|-------------|-------------|
| Population: national estimates at January 1st ('000) | 1,069,040.9 | 1,086,130.2 | 1,103,041.7 | 1,119,751.8 | 1,136,263.8 | 1,152,597.0 | 1,168,783.7 |
| Population aged 0-14 at January 1st ('000) | 362,467.8 | 363,980.4 | 365,085.6 | 365,738.7 | 365,966.9 | 365,857.3 | 365,545.8 |
| Population aged 15-64 at January 1st ('000) | 658,921.3 | 673,009.0 | 687,322.9 | 701,884.9 | 716,670.3 | 731,607.0 | 746,581.5 |
| Population aged 65+ at January 1st ('000) | 47,651.9 | 49,140.7 | 50,633.3 | 52,128.2 | 53,626.7 | 55,132.7 | 56,656.4 |
| Male population at January 1st ('000) | 553,627.1 | 562,268.8 | 570,804.7 | 579,222.4 | 587,524.8 | 595,725.5 | 603,846.4 |
| Female population at January 1st ('000) | 515,413.8 | 523,861.4 | 532,237.0 | 540,529.4 | 548,739.1 | 556,871.5 | 564,937.3 |
| Gross Domestic Product: per capita trends (Rs per capita) | 25,767.2 | 29,823.5 | 33,602.3 | 38,258.3 | 43,545.0 | 48,364.3 | 53,313.3 |
| Gross Domestic Product (total): real growth (national currencies) (1995 = 100) | 156.5 | 168.6 | 183.8 | 201.5 | 221.4 | 235.7 | 249.1 |
| Inflation rates (annual) (% growth) | 3.8 | 3.8 | 4.2 | 6.2 | 6.4 | 8.3 | 10.8 |
| Exchange rates against the US\$ (Rs per US\$) | 46.6 | 45.3 | 44.1 | 45.3 | 41.3 | 43.5 | 48.4 |
| Economically active population ('000) | 409,491.7 | 417,288.9 | 426,317.2 | 435,628.5 | 445,145.6 | 454,759.2 | 462,920.7 |
| Employed population as a % of EAP | 89.9 | 90.3 | 90.8 | 90.5 | 91.0 | 91.4 | 90.9 |
| Unemployed population ('000) | 41,389.0 | 40,458.0 | 39,348.0 | 41,466.0 | 39,974.0 | 39,112.0 | 42,332.7 |
| Unemployment rates (% of economically active population) | 10.1 | 9.7 | 9.2 | 9.5 | 9.0 | 8.6 | 9.1 |
| Disposable income (annual): per capita trends (Rs per capita) | 22,133.5 | 24,526.1 | 27,359.2 | 30,725.7 | 34,313.1 | 39,484.7 | 43,367.0 |
| Disposable income (annual): real growth (national currencies)(1995 = 100) | 168.3 | 182.6 | 198.4 | 213.1 | 227.0 | 244.6 | 245.8 |
| Consumer expenditure: per capita trends (Rs per capita) | 15,615.7 | 17,386.6 | 19,172.3 | 21,674.4 | 24,389.0 | 27,467.9 | 30,051.0 |
| Consumer expenditure (total): real growth (national currencies)(1995 = 100) | 139.8 | 152.4 | 163.7 | 176.9 | 189.9 | 200.3 | 200.5 |
| Catering consumer expenditure: per capita trends (Rs per capita) | 301.0 | 368.6 | 434.6 | 527.9 | 608.0 | 700.0 | 783.7 |
| Catering consumer expenditure (total): real growth (national currencies)(1995 = 100) | 174.6 | 209.3 | 240.4 | 279.2 | 306.8 | 330.7 | 338.8 |
| Households ('000) | 199,657.8 | 203,457.9 | 207,242.7 | 211,005.5 | 214,746.6 | 218,463.8 | 222,153.1 |
| Household average number of occupants at January 1st (number) | 5.4 | 5.3 | 5.3 | 5.3 | 5.3 | 5.3 | 5.3 |

Source: Euromonitor International from Trade Sources

Consumer Foodservice

India Consumer foodservice: total number of outlets by type 2003-2009

Table: 5.427

Number/% change

| | 2003 | 2004 | 2005 | 2006 | 2007 | 2008 | 2009 | % change 2003-2009 |
|------------------------------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|--------------------|
| Consumer Foodservice by Type | 1,017,917 | 1,135,878 | 1,267,338 | 1,393,708 | 1,513,065 | 1,628,969 | 1,748,003 | 71.7 |
| 100% Home Delivery/Takeaway | 149 | 159 | 187 | 193 | 223 | 250 | 255 | 71.1 |
| Cafés/Bars | 52,503 | 56,502 | 60,444 | 63,551 | 66,622 | 69,399 | 71,746 | 36.7 |
| Full-Service Restaurants | 410,856 | 438,996 | 469,351 | 503,905 | 540,903 | 581,357 | 603,207 | 46.8 |
| Fast Food | 35,687 | 40,876 | 46,427 | 52,221 | 58,017 | 62,833 | 66,087 | 85.2 |
| Self-Service Cafeterias | | | | | | | | |
| Street Stalls/Kiosks | 518,722 | 599,345 | 690,929 | 773,838 | 847,300 | 915,130 | 1,006,708 | 94.1 |

Source: Euromonitor International from Trade Sources

India Consumer foodservice: total value of sales by type 2003-2009

Table: 5.428

National currency million/% real growth/national currency per capita/US\$ per capita

| | 2003 | 2004 | 2005 | 2006 | 2007 | 2008 | 2009 | % real growth 2003-2009 | National currency per capita 2009 | US\$ per capita 2009 |
|------------------------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------------------|-----------------------------------|----------------------|
| Consumer Foodservice by Type | 1,618,246.8 | 1,836,143.4 | 2,111,006.4 | 2,397,579.1 | 2,698,296.2 | 3,195,019.1 | 3,546,940.7 | 52.9 | 3,034.7 | 62.7 |
| 100% Home Delivery/Takeaway | 481.6 | 537.4 | 645.3 | 619.4 | 763.5 | 960.7 | 1,053.0 | 52.5 | 0.9 | 0.0 |
| Cafés/Bars | 258,311.8 | 285,318.6 | 319,801.3 | 355,762.5 | 397,723.4 | 464,815.9 | 531,705.6 | 43.6 | 454.9 | 9.4 |
| Full-Service Restaurants | 1,023,740.3 | 1,140,469.2 | 1,289,672.9 | 1,446,215.0 | 1,606,978.3 | 1,881,739.6 | 2,048,671.6 | 39.6 | 1,752.8 | 36.2 |
| Fast Food | 181,552.5 | 221,631.4 | 275,100.1 | 330,801.0 | 391,614.8 | 486,660.1 | 525,270.6 | 101.9 | 449.4 | 9.3 |
| Self-Service Cafeterias | | | | | | | | | | |
| Street Stalls/Kiosks | 154,160.5 | 188,186.8 | 225,786.8 | 264,181.1 | 301,216.3 | 360,842.8 | 440,239.9 | 99.2 | 376.7 | 7.8 |

Source: Euromonitor International from Trade Sources

India Consumer foodservice: total number of outlets by chained/independent: % analysis 2003-2009

Table: 5.429

% of total number of consumer foodservice outlets

| | 2003 | 2004 | 2005 | 2006 | 2007 | 2008 | 2009 |
|-------------------------|-------|-------|-------|-------|-------|-------|-------|
| Chained Foodservice | 0.3 | 0.3 | 0.3 | 0.3 | 0.4 | 0.4 | 0.4 |
| Independent Foodservice | 99.7 | 99.7 | 99.7 | 99.7 | 99.6 | 99.6 | 99.6 |
| Total | 100.0 | 100.0 | 100.0 | 100.0 | 100.0 | 100.0 | 100.0 |

Source: Euromonitor International from Trade Sources

India Consumer foodservice: total sales by chained/independent: % analysis 2003-2009

Table: 5.430

% of total consumer foodservice sales

| | 2003 | 2004 | 2005 | 2006 | 2007 | 2008 | 2009 |
|-------------------------|-------|-------|-------|-------|-------|-------|-------|
| Chained Foodservice | 1.4 | 1.5 | 1.5 | 1.7 | 1.8 | 1.9 | 1.9 |
| Independent Foodservice | 98.6 | 98.5 | 98.5 | 98.3 | 98.2 | 98.1 | 98.1 |
| Total | 100.0 | 100.0 | 100.0 | 100.0 | 100.0 | 100.0 | 100.0 |

Source: Euromonitor International from Trade Sources

India Consumer foodservice: total number of outlets by location 2003-2009

Table: 5.431

Number/% change

| | 2003 | 2004 | 2005 | 2006 | 2007 | 2008 | 2009 | % change 2003-2009 |
|----------------------------------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------------------|
| Consumer Foodservice by Location | 1,017,918 | 1,135,879 | 1,267,339 | 1,393,709 | 1,513,066 | 1,628,969 | 1,748,004 | 71.7 |
| Standalone | 927,273 | 1,031,242 | 1,143,417 | 1,244,309 | 1,340,435 | 1,427,819 | 1,523,292 | 64.3 |
| Leisure | 4,696 | 5,024 | 5,898 | 7,622 | 11,261 | 12,456 | 13,021 | 177.3 |
| Retail | 19,073 | 23,652 | 31,437 | 44,851 | 55,858 | 75,492 | 86,992 | 356.1 |
| Lodging | 47,693 | 51,669 | 54,838 | 56,272 | 57,287 | 58,181 | 60,515 | 26.9 |
| Travel | 19,185 | 24,293 | 31,750 | 40,656 | 48,226 | 55,024 | 64,186 | 234.6 |

Source: Euromonitor International from Trade Sources

India Consumer foodservice: leading company shares 2009

Table: 5.432

% foodservice value

| Company Name (Global Brand Owner) | 2009 |
|--|------|
| McDonald's Corp | 0.2 |
| Yum! Brands Inc | 0.2 |
| Amalgamated Bean Coffee Trading Co Ltd | 0.1 |
| Domino's Pizza Inc | 0.1 |
| Indian Hotels Co Ltd | 0.1 |

Source: Euromonitor International from Trade Sources

Cafés/Bars**India Cafés/bars: total number of outlets and total foodservice sales 2003-2009**

Table: 5.433

As stated

| | 2003 | 2004 | 2005 | 2006 | 2007 | 2008 | 2009 |
|--|-----------|-----------|-----------|-----------|-----------|-----------|-----------|
| Number of outlets | 52,503.0 | 56,502.0 | 60,444.0 | 63,551.0 | 66,622.0 | 69,399.0 | 71,746.0 |
| % change | 8.5 | 7.6 | 7.0 | 5.1 | 4.8 | 4.2 | 3.4 |
| Value (Rs million) | 258,311.8 | 285,318.6 | 319,801.3 | 355,762.5 | 397,723.4 | 464,815.9 | 531,705.6 |
| % real growth | 6.3 | 6.4 | 7.5 | 5.1 | 5.1 | 7.9 | 5.3 |
| Rs per capita | 241.6 | 262.7 | 289.9 | 317.7 | 350.0 | 403.3 | 454.9 |
| Chained consumer foodservice as a % of the total number of Cafés/ Bars outlets | 30.6 | 31.8 | 31.1 | 32.0 | 33.1 | 35.0 | 33.9 |

Source: Euromonitor International from Trade Sources

India Cafés/bars: total number of outlets by type 2003-2009

Table: 5.434

Number/% change

| | 2003 | 2004 | 2005 | 2006 | 2007 | 2008 | 2009 | % change 2003-2009 |
|-------------------------|--------|--------|--------|--------|--------|--------|--------|-----------------------|
| Cafés/Bars | 52,503 | 56,502 | 60,444 | 63,551 | 66,622 | 69,399 | 71,746 | 36.7 |
| Specialist Coffee Shops | 342 | 475 | 590 | 800 | 1,094 | 1,514 | 1,698 | 396.5 |
| Other Cafés/Bars | 52,161 | 56,027 | 59,854 | 62,751 | 65,528 | 67,885 | 70,048 | 34.3 |

Source: Euromonitor International from Trade Sources

India Cafés/bars: total value of foodservice sales by type 2003-2009

Table: 5.435

National currency million/% share of total café/bar foodservice sales

| | 2003 | 2009 | % sales 2003 | % sales 2009 |
|-------------------------|-----------|-----------|-----------------|-----------------|
| Cafés/Bars | 258,311.8 | 531,705.6 | 100.0 | 100.0 |
| Specialist Coffee Shops | 1,754.5 | 8,664.3 | 0.7 | 1.6 |
| Other Cafés/Bars | 256,557.3 | 523,041.3 | 99.3 | 98.4 |

Source: Euromonitor International from Trade Sources

Full-Service Restaurants**India Full-service restaurants: total number of outlets and total foodservice sales 2003-2009**

Table: 5.436

As stated

| | 2003 | 2004 | 2005 | 2006 | 2007 | 2008 | 2009 |
|---|-------------|-------------|-------------|-------------|-------------|-------------|-------------|
| Number of outlets | 410,856.0 | 438,996.0 | 469,351.0 | 503,905.0 | 540,903.0 | 581,357.0 | 603,207.0 |
| % change | 6.7 | 6.8 | 6.9 | 7.4 | 7.3 | 7.5 | 3.8 |
| Value (Rs million) | 1,023,740.3 | 1,140,469.2 | 1,289,672.9 | 1,446,215.0 | 1,606,978.3 | 1,881,739.6 | 2,048,671.6 |
| % real growth | 7.7 | 7.4 | 8.5 | 6.0 | 4.5 | 8.1 | 0.2 |
| Rs per capita | 957.6 | 1,050.0 | 1,169.2 | 1,291.5 | 1,414.3 | 1,632.6 | 1,752.8 |
| Chained consumer foodservice as a % of the total number of Full- Service restaurant outlets | 28.4 | 25.6 | 24.3 | 23.8 | 22.7 | 21.5 | 20.9 |
| Full-service casual dining as a % of the total number of full-Service restaurant outlets | 0.0 | 0.1 | 0.1 | 0.1 | 0.1 | 0.1 | 0.1 |

Source: Euromonitor International from Trade Sources

India Full-service restaurants: total number of outlets by type 2003-2009

Table: 5.437

Number/% change

| | 2003 | 2004 | 2005 | 2006 | 2007 | 2008 | 2009 | % change 2003-2009 |
|--------------------------|---------|---------|---------|---------|---------|---------|---------|-----------------------|
| Full-Service Restaurants | 410,856 | 438,996 | 469,351 | 503,905 | 540,903 | 581,357 | 603,207 | 46.8 |
| Asian | 410,640 | 438,740 | 469,030 | 503,495 | 540,400 | 580,749 | 602,515 | 46.7 |
| European | 3 | 6 | 9 | 13 | 18 | 25 | 31 | 933.3 |
| Latin American | | | | | | | | |
| Middle Eastern | | | | | | | | |
| North American | 8 | 13 | 14 | 25 | 26 | 28 | 28 | 250.0 |
| Pizza | 205 | 237 | 297 | 370 | 450 | 536 | 612 | 198.5 |
| Other | | | 1 | 2 | 9 | 19 | 21 | |

Source: Euromonitor International from Trade Sources

India Full-service restaurants: total value of foodservice sales by type 2003-2009

Table: 5.438

National currency million/% share of total full-service restaurant foodservice sales

| | 2003 | 2009 | % sales 2003 | % sales 2009 |
|--------------------------|-------------|-------------|-----------------|-----------------|
| Full-Service Restaurants | 1,023,740.3 | 2,048,671.6 | 100.0 | 100.0 |
| Asian | 1,021,012.2 | 2,035,959.9 | 99.7 | 99.4 |
| European | 82.5 | 785.0 | 0.0 | 0.0 |
| Latin American | | | | |
| Middle Eastern | | | | |
| North American | 101.3 | 546.5 | 0.0 | 0.0 |
| Pizza | 2,544.4 | 10,355.2 | 0.2 | 0.5 |
| Other | | 1,025.0 | | 0.1 |

Source: Euromonitor International from Trade Sources

Fast Food**India Fast food: total number of outlets and total foodservice sales 2003-2009**

Table: 5.439

As stated

| | 2003 | 2004 | 2005 | 2006 | 2007 | 2008 | 2009 |
|--|-----------|-----------|-----------|-----------|-----------|-----------|-----------|
| Number of outlets | 35,687.0 | 40,876.0 | 46,427.0 | 52,221.0 | 58,017.0 | 62,833.0 | 66,087.0 |
| % change | 14.8 | 14.5 | 13.6 | 12.5 | 11.1 | 8.3 | 5.2 |
| Value (Rs million) | 181,552.5 | 221,631.4 | 275,100.1 | 330,801.0 | 391,614.8 | 486,660.1 | 525,270.6 |
| % real growth | 17.6 | 17.6 | 19.1 | 13.7 | 11.3 | 14.7 | -0.7 |
| Rs per capita | 169.8 | 204.1 | 249.4 | 295.4 | 344.7 | 422.2 | 449.4 |
| Chained consumer foodservice as a % of the total number of Fast Food outlets | 16.7 | 15.8 | 16.4 | 17.6 | 18.5 | 19.1 | 20.2 |

Source: Euromonitor International from Trade Sources