



FOODSERVICE DIGEST

**Helping Executives
Stay Current on
Foodservice Industry News**

IN THIS ISSUE:

Restaurant Chains...*Baskin-Robbins rolls out light line* 2
International...*Chipotle bites into London market* 8
Restaurant Concepts...*Texas Roadhouse founder floats Aspen Creek* 9
Independents...*Colicchio debuts 'Frugal Fridays' at Craft* 11
Recreation...*Brinker and Regal cook up 'movie and a meal' deal* 12
Government...*Groundbreaking White House chef keeps her job* 13
Noteworthy...*Philadelphia passes menu labeling law* 14

AS I SEE IT...



**Industry Forecast:
Where Do We Go
From Here?**

By Ron Paul, President

We've just released our latest Foodservice Forecast for 2009, projecting a nominal sales decline of 2.6% for restaurants and bars and of 2.2% for all foodservice (including Beyond Restaurant segments). In real terms (assuming 2.5% menu price inflation) that's a 5.0% contraction for restaurants and a 4.6% contraction for foodservice overall. Limited service will likely be nominally flat, amounting to a real downturn of 2.4%. Full service will take the big hit, declining 6.0% in nominal terms and 8.3% in real terms.

Technomic 2008/2009 U.S. Foodservice Industry Forecast

Segment	2008 (R)		2009 (F)	
	Nominal	Real	Nominal	Real
<i>Limited Service Restaurants</i>	2.0%	-2.4%	0.0%	-2.4%
<i>Full Service Restaurants</i>	-2.5%	-6.7%	-6.0%	-8.3%
<i>Bars and Taverns</i>	3.5%	-1.0%	1.5%	-1.0%
<i>Total Restaurants</i>	0.0%	-4.3%	-2.6%	-5.0%
<i>Beyond Restaurants</i>	0.8%	-3.5%	-1.5%	-3.9%
<i>Total Foodservice</i>	0.3%	-4.1%	-2.2%	-4.6%

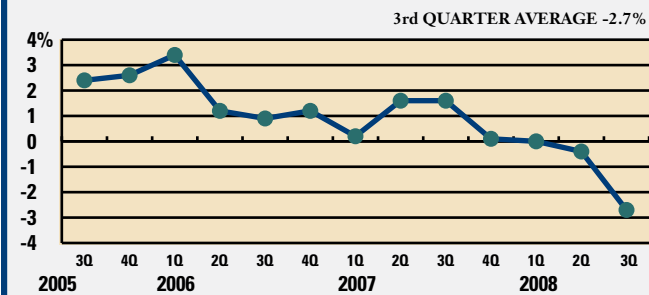
R = Revised; F = Forecast

To create our forecasts, we draw on government statistics, other organizations that track the industry, public company reports and our own panel of operators. Yet the data underlying the assumptions can change. Right now, uncertainties swirl around economic and political fundamentals—stock prices, credit markets, the geopolitical situation, the new administration in Washington—as well as the outlook for consumer spending.

Technomic's latest consumer research sheds some light on the future. We asked consumers both what was important to their lifestyle and where they will make cutbacks given the weak economy. Much discretionary spending fell in the "less important" quadrant where consumers find cutbacks fairly easy. Expenditures viewed by consumers as very discretionary include new cars, electronics, gadgets, cruises and other foreign vacations, and tickets for outings such as movies, concerts and sporting events.

Same-Store Sales—Quarterly Data Weighted Average Change, Excluding McDonald's*

(Compared to Same Period Year Earlier)



Source: Company releases; Technomic, Inc.
*Representing all chains reporting at time of publication.

Consumers told us they'll eat and entertain at home more. They're reluctantly planning to cut back spending in local eateries, casual-dining chains and fast-food establishments, but these are viewed as real sacrifices—consumers see these restaurants as important to their lifestyles. (Reducing spending in upscale restaurants, coffee shops, bars and nightclubs will be easier, since consumers see them as less central to their lifestyles.)

Only in expenditures like home ownership, home improvements, gifts and donations are necessary cutbacks as keenly felt as in restaurant lifestyle spending. People still love to eat out—not just for convenience, but for a pleasurable sensory experience and change in routine. Implication: The restaurant industry will remain an important part of American lifestyles for the foreseeable future.

In the current economic environment, we recommend that you approach forecasting as scenario planning, rather than attempting to project a specific outcome and plan accordingly. What if conditions in six months are 10% worse or 10% better than expected? What would you do differently? Good advice for uncertain times is, "Plan for the best but prepare for the worst."

AS I SEE IT, in the coming months, competition for customers will be intense and there will be no room for error in execution or cost control. But our consumer research confirms that in the long term, the future of the foodservice industry remains bright.

Ron Paul is president of Technomic, Inc., a leading marketing and management consulting firm that has been serving the food industry since 1966.

Restaurant Chains

Baskin-Robbins has launched a line of healthier frozen desserts. The BRight Choice options are fat-free, dairy-free, no-sugar-added and light ice-cream treats. They range from 80 to 140 calories per 2.5-oz. scoop. The BRight Choice menu includes Premium Churned Light Vanilla, Milk Chocolate, Raspberry Chip, Butter Almond Crunch and Pineapple Coconut ice cream as well as fat-free Vanilla Frozen Yogurt and Real Fruit Strawberry Sorbet. Additional choices will be rolled out throughout 2009. (*QSR Magazine Online 12/29/08; Nation's Restaurant News Online 12/30/08*)

Boston Market has named Fallon Minneapolis as its new advertising agency. Fallon, a part of the **Fallon Worldwide** holding of Paris-based **Publicis Groupe S.A.**, will handle Boston Market's creative development, media strategy and media buying. **Sun Capital Partners Inc.** operates 550 Boston Market units in the U.S. (*Nation's Restaurant News Online 1/9/09*)

Brinker International Inc. has completed the sale of its majority interest in Romano's Macaroni Grill to Mac Acquisition LLC, an affiliate of San Francisco-based Golden Gate Capital. The deal, valued at \$88 million, gives Golden Gate an 80.1% stake in Mac Acquisitions with Brinker holding a 19.9% interest. As part of the transaction, Brinker will continue to provide transition services for a minimum of one year and Macaroni Grill restaurants will continue to participate in Brinker's gift card program. Additionally, Doug Brooks, chairman and CEO of Brinker International, will serve on the board of directors of Mac Acquisition. (*Chain Leader 12/19/08; Yahoo! Finance 12/19/08; Company Release 12/19/08*)

Burger King Corp. has escaped a lawsuit filed by the Center for Science in the Public Interest (CSPI) over the use of trans fats. The lawsuit, filed in May, was intended to stop Burger King from using artificial trans fats or force the

chain to post warnings about trans fats on menu boards. However, a District of Columbia Superior Court judge dismissed the lawsuit, saying that CSPI had no legal grounds because no persons were cited as having been harmed by Burger King's use of trans fats. (*Nation's Restaurant News Online 12/22/08*)

Burger King Corp. has named Austin, TX-based LatinWorks as its Hispanic advertising agency of record for the U.S. LatinWorks' clients include **Anheuser-Busch, Domino's Pizza** and **Mars Inc.**

(*Nation's Restaurant News Online 1/15/09; QSR Magazine Online 1/15/09*)

Burger King Corp. has rolled out mini-burgers as its newest limited-time offer. The BK Burger Shots consist of two broiled mini-burgers. The LTO is currently available in at least one New York City store and in Southern New England restaurants. The U.S. test of the BK Burger Shots follows a successful showing abroad. Burger King units in the United Arab Emirates now offer Burger Buddies, a six-pack of conjoined mini-burgers. Restaurants in Britain, Germany and Spain offer the Angus 6 Pack. Burger King tested miniature burgers called Burger Bundles in the 1980s, but the product was discontinued. (*Nation's Restaurant News Online 12/23/08*)

Burger King has introduced a new version of its signature Whopper burger. Through the end of March, the chain is offering the Angry Whopper sandwich—a flame-broiled burger patty topped with onions, jalapeños, pepper Jack cheese, bacon, lettuce, mayonnaise and “Angry” sauce, served on a sesame-seed bun. To promote the new item, Burger King has launched a microsite, www.angry-gram.com, which allows guests to deliver “Angry-Gram” emails featuring the new burger. The humorous e-mails contain an Angry Whopper that rebukes the recipient with a message recorded by the sender. The Angry Whopper is menued for a suggested retail price of \$3.69, the Angry Double Whopper for \$4.49, and the Angry Triple Whopper for \$5.19. (*QSR Magazine Online 1/5/09*)

Chili's Grill & Bar has offered comedian and game-show host Drew Carey the chance to be an honorary manager for a day. The president of the chain, Todd Diener, also offered to make a donation to a charity of Carey's choice. The invitation follows a *Washington Post* article that asked celebrities, “What would you be doing if acting hadn't panned out?” Carey replied, “Probably managing a restaurant...I'd be at a Chili's near you. I'd be the boss that everybody liked.” To date, Carey has not responded to the offer. Dallas-based **Brinker International Inc.** operates more than 1,400 restaurants systemwide. (*Nation's Restaurant News Online 1/11/09*)

CiCi's Pizza will expand in the Las Vegas area. The pizza buffet restaurant chain recently opened its fourth location in Las Vegas, with plans to debut three more units in 2009. The expansion efforts are part of CiCi's plan to have 1,000 units by 2010. The company currently has nearly 650 restaurants in 30 states. (*QSR Magazine Online 1/2/08*)

CKE Restaurants has signed a franchise development agreement to open a minimum of 121 Carl's Jr. restaurants in Texas. Under the deal, **RWJP Star Enterprises** will open the units in the Beaumont, Dallas-Fort Worth, Houston and Tyler-Longview markets over the next 10 years. There are currently 16 franchised and three company-owned Carl's Jr. units in Texas. CKE Restaurants operates 1,185 Carl's Jr. restaurants systemwide.

(*Business Wire 1/6/09; Restaurant News Resource Online 1/6/09*)

CKE Restaurants has sold off 11 Hardee's restaurants in the Jefferson City and Columbia, MO, markets to Rising Stars LLC. Terms for the deal were not disclosed. With the sale, CKE says that it has completed its strategic refranchising program. Steve Rosenfield and Buddy Brown, principals of Rising Star, currently own and operate more than 100 Carl's Jr. and Hardee's restaurants in Colorado, Georgia, Kansas, Missouri, Montana and Wyoming. As part of the most recent deal, the franchisee has also signed on to open three new Hardee's units over the next five years in the Jefferson City and Columbia markets. Under the refranchising program, announced in April 2007,

CKE sold a total of 238 Hardee's units to franchisees and secured commitments for 115 new franchise restaurants under development agreements for those markets. *(Company Release 1/15/09; QSR Magazine Online 1/15/09)*

Darden Restaurants Inc. is planning to move into its new \$100 million headquarters in Orlando this fall.

The three-story, steel-and-glass building will house approximately 1,550 employees, bringing together executives and support personnel under one roof. The building will include test kitchens for all six of Darden's brands. *(Orlando Sentinel Online 1/12/09)*

Domino's Pizza is rolling out a new pricing strategy in an effort to lure more value-focused customers.

The new "barbell" pricing strategy will offer a select number of lower-priced products to appeal to customers searching for a good deal, while premium products that cost more will be available for customers who are less price-sensitive. Domino's says that price increases in recent years have led to the loss of a number of "single-pizza customers"—those who are looking for an inexpensive dinner and place an order for just one pie. The company has not disclosed which menu items it plans to offer at lower prices, but says that its new hot sandwiches, priced at \$4.99 each, are an example of the new strategy. In addition, the chain is moving away from offering limited-time-only deals and will instead add value-focused items to its permanent menu. *(Forbes Online 1/12/09)*

Dunkin' Donuts has launched a new \$100 million ad campaign for 2009.

The "You Kin' Do It!" campaign is a takeoff of its former "America Runs on Dunkin'" campaign by encouraging hardworking Americans to accomplish daily tasks using Dunkin' Donuts as daily "fuel." The campaign includes radio, print, online and outdoor marketing as well as three TV spots that will begin airing during network prime time and national cable programming. The campaign was created by Boston-based firm **Hill Holliday**. *(QSR Magazine Online 1/5/09; Foodservice.com 1/6/09)*

Fatburger is expanding into Maryland.

The burger chain will open its first restaurant in the state after signing a franchise deal for a total of 10 Fatburger units in the Washington, DC, area. The remaining stores will open over the next six years. Parent **Fog Cutter Capital Group Inc.** operates about 100 Fatburger restaurants systemwide. *(TradingMarkets.com 1/13/09)*

Fazoli's has launched a giveaway campaign to increase brand recognition and store sales.

The "Italian Revolution" campaign, offering alternatives to "overpriced" Italian foods, includes a microsite, www.freespaghetti.com, where visitors can view a YouTube.com spoof newsreel video and access an online coupon for a free spaghetti dish with the order of a small beverage. The chain estimates it may give away up to 2.7 million pounds of spaghetti during the promotion. **Sun Capital Partners** is parent of the 264-unit Fazoli's chains. *(Nation's Restaurant News Online 1/6/09)*

Good Times Burgers & Frozen Custard is updating its menu for 2009.

New items include a honey-cured bacon burger, hand-breaded onion rings, fresh-cut fries and freshly squeezed lemonade. In addition, the chain is switching to all-natural Angus beef for its hamburgers and making the patties 10% larger, as well as overhauling its chicken sandwiches and frozen custard treats. The price of core burgers will be lowered by 10–20%, but prices will increase for select premium products. **Good Times Restaurants Inc.** operates 54 restaurants in Colorado, Idaho, North Dakota and Wyoming. *(Nation's Restaurant News Online 1/5/09)*

Jamba Juice debuted its newest breakfast offering: Steel-Cut Oatmeal with Fruit.

The item was initially available at Chicago locations, with a nationwide rollout scheduled for January 15. The steel-cut oats, which are high in protein and fiber, are slow-cooked and topped with a choice of brown sugar crumble, bananas or blueberries. The oatmeal is prepared fresh in stores and sells for a recommended price of \$2.95. Parent **Jamba Inc.** operates or franchises 749 stores across the U.S. *(Nation's Restaurant News Online 12/18/08)*

IHOP has inked an agreement with the Harlem Globetrotters to become the official restaurant of the iconic basketball team. Under the agreement, IHOP will run in-game promotions throughout the Globetrotters' 2009 "Spinning The Globe" tour, slated to visit more than 200 markets across North America through mid-April. In-game marketing will include audience promotions, courtside signage and a bounce-back offer for in-restaurant benefits to all ticket stub holders. Restaurant support includes Globetrotter signage; Globetrotter-themed kids' menus and placemats; and point-of-purchase displays offering discounts on game tickets. Terms for the agreement were not disclosed. *(Business Wire 1/14/09)*

IHOP has launched an all-day, all-you-can-eat pancake offer dubbed the "2009 Hungry Consumer Relief Plan" to encourage dining out despite the current economic climate. Customers can choose the pancakes à la carte or as part of a combination meal. Glendale, CA-based **DineEquity Inc.** is parent of the 1,375-unit IHOP chain. *(Nation's Restaurant News Online 1/5/09)*

Marie Callender's Restaurant & Bakery founder, Donald W. Callender, has died at the age of 81. In 1948, Callender transformed his parents' pie bakery—named for his mother, Marie—into the bakery-café concept, Marie Callender's. Throughout his life, Callender also experimented with other restaurant concepts, including **Geezer's Garlic Grill**, a golf-themed restaurant; **Bottom Gun Café**, an aviation-themed restaurant; and **Babe's Bar-B-Que Grill and Brewhouse**. *(Nation's Restaurant News Online 1/8/09; Los Angeles Times Online 1/8/09)*

McDonald's USA has extended its agreement with Green Mountain Coffee Roasters Inc. to provide packaged Newman's Own Organics Blend coffee at more than 600 restaurants. Green Mountain will source, roast and package the coffee, which will be sold in select McDonald units in Connecticut, Maine, Massachusetts, New Hampshire, New York, Rhode Island and Vermont. Newman's Own Organics coffee created exclusively for McDonald's was first introduced to the chain's New England stores in late 2005. The coffee, a combination of light and medium roasts, can be served hot or iced and is offered in regular and decaffeinated varieties. Newman's Own Organics Blend also comes in three flavored iced coffee varieties: hazelnut, vanilla and caramel. *(QSR Magazine Online 1/2/09)*

Papa Romano's Pizza and Mr. Pita parent Askar Brands LLC has inked a franchise agreement to expand into the Chicago and Indianapolis markets. The new deal, signed with **Abajee Developers Inc.**, calls for a mix of stand-alone Papa Romano's Pizza and Mr. Pita units as well as a number of co-branded stores. Abajee expects to open its first store by summer 2009 in Chicago. The deal is part of Askar Brands' long-term growth plans, which call for several hundred units to open in Illinois and Indiana over 10–15 years. *(Pizza Marketplace Online 12/15/08)*

Pizza Hut restaurants in the U.S. are switching to all-natural ingredients. The company announced it will no longer rely on artificial preservatives, colors and flavors for its food, and will only use pepperoni and other sausages that are free of nitrates and nitrites. Other changes include using 100% real beef and chicken and serving sauces that are free of high-fructose corn syrup. This initiative follows the successful testing of Pizza Hut's "The Natural" pizza—topped with a sauce made from vine-ripened tomatoes and all-natural mozzarella cheese. In addition, Pizza Hut has introduced a new pizza box made from 40% recycled materials. **Yum! Brands Inc.** operates or franchises more than 10,000 restaurants worldwide, including more than 6,000 in the U.S. *(Nation's Restaurant News Online 1/12/09; Restaurants & Institutions Online 1/7/09)*

Pizza Inn is lowering royalty rates for new and existing franchises to aid expansion. The company has stated it will wave sales royalties for the first year and collect only a 2% royalty in the second year. Pizza Inn normally implements a 4% royalty rate. The Colony, TX-based Pizza Inn Inc. operates more than 300 restaurants in the U.S. *(Nation's Restaurant News Online 1/14/09)*

Quiznos Sub has rolled back prices and unveiled a new menu design in an effort to strengthen its value appeal. Prices have been cut for more than 37 sandwiches, entrées and other items, including 20 subs now priced under \$5. The new prices are reflected on revamped in-store menu boards designed to reduce clutter and to highlight value. The new menu boards are now divided into four core categories: signature, premium, everyday value and flatbread salads. Each category offers a single price point for each size as well as an option to create a combo meal. Quiznos has launched a new TV ad campaign to support the effort. (*Franchising.com 1/12/09; Nation's Restaurant News Online 1/12/09*)

Red Mango investor CIC Advantage Holdings LLC has purchased a 5.6% stake in Jamba Inc. This amounts to nearly 3.1 million shares of Jamba for \$2.65 million, or an average of \$0.85 per share. CIC Advantage previously purchased a controlling stake in frozen-yogurt chain Red Mango with a \$12-million investment. CIC Advantage Holdings is an affiliate of Dallas-based private-equity group **CIC Partners**, which recently formed a partnership with the **New York Yankees**, **Dallas Cowboys** and **Goldman Sachs** to create on-site management company **Legends Hospitality Management**. (*Nation's Restaurant News Online 1/14/09*)

Rita's Ice is planning to open 50 stores in the Houston area over the next several years. The first location is slated to debut this spring. The company is targeting busy shopping centers for future development sites. Trevoze, PA-based Rita's Ice has more than 500 stores in the U.S. (*Houston Business Journal Online 12/30/08*)

Ruby Tuesday Inc. plans to close up to 70 units, or roughly 10% of its domestic corporate locations. The company will close 40 restaurants in February at the end of its third quarter, and an additional 30 units will be shuttered during the next several years. Slow sales, increased costs from renovations and high levels of accumulated debt are the reasons given for the closures. In addition, Ruby Tuesday will sell between 35 and 40 surplus properties that had been purchased for future development. The closures and lease terminations are estimated to cost the company between \$40 and \$55 million. Maryville, TN-based Ruby Tuesday Inc. currently operates or franchises 942 restaurants worldwide, including 714 company-owned U.S. locations. (*Nation's Restaurant News Online 12/22/08*)

SONIC Drive-In has launched a national value menu. The Everyday Value Menu features 11 items priced at \$1 each, including four entrées, three sides, and four snacks and beverages. Selections include a Chicken Strip Sandwich, Junior Deluxe Burger, Junior Fritos Chili Cheese, Junior Breakfast Burrito, small Tots and fries, small soft drinks and slushes, a small vanilla cone, a Junior Candy Sundae and a fresh banana. All items are offered all day. Oklahoma City-based **SONIC Corp.** has 3,500 locations across the country. (*Business Wire 12/15/08; Nation's Restaurant News Online 12/29/08*)

Starbucks Corp. is considering cutting back or stopping corporate contribution to employees' 401(k) accounts next year. The company recently sent a letter to employees stating that matching contributions may be altered or reduced in 2009. The *Wall Street Journal* estimated that Starbucks spends about \$15 million annually on matching employee 401(k) contributions. (*Puget Sound Business Journal Online 12/24/08; Foodservice.com 12/24/08*)

Starbucks has purchased a \$45 million corporate jet. A spokesperson for the company told the *Seattle Times* that the Gulfstream 550 was ordered three years ago and "canceling would have been too expensive." Starbucks also owns two other jets for conducting international business, one of which the company is trying to sell. Starbucks' policy states that employees must reimburse the company for any personal use of the jets. (*The Bellingham Herald Online 1/8/09*)

Starbucks has rolled out a new better-for-you line of tea-based beverages in more than 11,000 U.S. stores. The lineup includes Full Leaf Tazo Tea Lattes, available in Black Tea, Vanilla Rooibos and London

Fog flavors, and Tazo Tea Infusions, available hot or cold in Berry Chai and Apple Chai flavors. The new beverages are Starbucks' first tea offerings to use full-leaf tea bags and allow customers to steep to their own taste preference. All of the new tea drinks have fewer than 200 calories for a 12-oz. or "tall" serving, with the exception of the Apple Chai Infusion, which has 250 calories. A tall tea latte is priced between \$2.85 and \$3.50, and a tall Tazo Tea Infusion costs between \$2.40 and \$2.70. *(Nation's Restaurant News Online 1/2/09; NRA SmartBrief 12/31/08)*

Starbucks is involved in two lawsuits over unfair labor practices in New York and Michigan stores. In New York, a judge recently found Starbucks guilty of unfairly imposing work rules, interrogating employees and disciplining or firing workers who supported the efforts of the **Industrial Works of the World (IWW)**, a union that has been working toward organizing Starbucks' Manhattan employees. According to the ruling, Starbucks must give three former employees their jobs back and compensate them for lost earnings, remove disciplinary actions issued to other workers from their files, and stop blocking union activity. Starbucks plans to appeal the ruling. In Michigan, Starbucks has agreed to settle with the National Labor Relations Board over a Grand Rapids barista who claims he was fired for participating in IWW union activities. Terms of the settlement were not disclosed. The firing came eight months after the IWW and Starbucks settled a previous complaint at the same Grand Rapids store. A part of that settlement, Starbucks agreed to post notices on store bulletin boards advising that employees have the right to join a union. *(Nation's Restaurant News Online 12/29/08; Business Week 1/7/09)*

Subway has reached a \$645,000 settlement with three California counties. Marin, Sonoma and Santa Cruz counties filed civil action lawsuits against Subway franchisor **Doctors Associates Inc.** and the **Subway Franchisee Advertising Fund Trust** for not fully disclosing restrictions on promotions and not granting customers advertised discounts on food. California law requires merchants to always charge the lowest prices advertised. Although Subway has not acknowledged wrongdoing, the company will offer consumers in these counties a \$2 gift card for future purchases. *(The Sacramento Bee Online 12/20/08)*

Sun Capital Partners Inc., a private-equity firm that owns 10 restaurant companies, is laying off 10% of its corporate workforce, or about 23 employees. The company, whose restaurants make up roughly 11% of its portfolio, has assets that total more than \$10 billion. Restaurants controlled by Sun Capital include **Friendly Ice Cream Corp.**, **Boston Market Corp.**, **Real Mex Restaurants Inc.** and the more recently acquired **Smokey Bones Barbeque & Grill**, **Timothy's World Coffee** and **Restaurants Unlimited**. *(Nation's Restaurant News Online 1/9/09)*

Taco Maker has announced its expansion plans for 2009. The Mexican quick-service chain will open 25 units in the U.S. and Puerto Rico. Franchisees will have the option to co-brand new units with either of the company's two other concepts, Jake's Over the Top and Mayan Juice. Ogden, UT-based **Taco Maker Inc.** opened 15 stores in 2008, including six locations in **Walmart** retail centers. *(Nation's Restaurant News Online 1/14/09)*

Togo's Eateries is now offering a daily special featuring one of its signature 6-in. sandwiches. The daily special is offered at a reduced price of \$3.99, below the recommended regular price of \$4.59 to \$5.59. Possible daily special sandwich offerings include Turkey & Cheese, Roast Beef & Avocado, Meatball, and Lemon Pepper Tuna. Togo's described the promotion as a limited-time offer, but has not specified an end date. **Togo's Holdings LLC**, which is controlled by private-equity firm **Mainsail Partners** of San Francisco, operates 248 Togo's units in the U.S. *(Nation's Restaurant News Online 1/7/09)*

Tumbleweed Southwest Grill has revamped its menu to increase store sales. The new menu emphasizes entrées such as a half-pound of baby back ribs, burgers and a line of burritos, and features more beer and less wine. Changes to the menu come in the wake of the bankruptcy filing of one of the company's veteran franchisees,

Diamond Management Inc., which closed all seven of its restaurants in Illinois and Wisconsin. Tumbleweed has 52 restaurants, including 10 international locations. (*Courier-Journal.com* 12/21/08)

Uno Chicago Grill will roll out its new gluten-free pizzas nationwide. The company has been testing the gluten-free cheese and pepperoni pizzas in Maine, Massachusetts, New Hampshire, Rhode Island and Vermont over the past year, and has reported strong consumer demand in these markets. Uno restaurants also cater to customers with food allergies by labeling all menu items that contain fish or shellfish; soy; tree nuts or peanuts; eggs; milk; and wheat or gluten. Boston-based Uno Chicago Grill has approximately 200 stores in the U.S. (*Nation's Restaurant News Online* 1/13/09)

Waffle House Inc. is planning to buy 121 restaurants from franchisee Northlake Foods of Brandon, FL, which filed for bankruptcy protection in September. Once the sale has been approved, Waffle House Inc. will create a new subsidiary called **East Coast Waffles** to operate the restaurants. At the time of the filing, Northlake Foods owned 146 Waffle House restaurants in the South. (*Food & Beverage News Online* 12/22/08; *MSNBC.com* 12/18/08)

Wendy's plans to cut the number of units selling breakfast items and revamp its morning offerings. The chain will reduce the number of Wendy's locations selling breakfast from 850 to between 450 and 475. Wendy's will also focus on testing a revamped breakfast menu in the Kansas City, Phoenix and Pittsburgh markets, with plans to relaunch a nationwide breakfast menu in 2011. Parent **Wendy's/Arby's Group Inc.** operates approximately 6,600 restaurants systemwide. (*Yahoo! Finance* 1/13/09; *Food & Beverage News Online* 1/13/09)

White Castle will roll out new "green" food packaging as part of its efforts to become a more environmentally friendly chain. The traditional white paper sacks and white corrugated Crave Cases will now instead feature brown paper made from 100% recycled material. Other future green initiatives for White Castle include storm water bioretention and use of more green building materials for new development. White Castle owns and operates 412 restaurants in the U.S. (*PR Newswire* 1/8/09; *Food & Beverage News Online* 1/9/09)

Yum! Brands Inc. has launched an online "Keep it Balanced" wellness campaign for A&W, KFC, Long John Silver's, Pizza Hut and Taco Bell employees. The company is teaming with online fitness services provider eFit4Me.com and **University of Louisville** basketball coach Rick Pitino to offer a free one-month trial membership to eFit4Me. A discounted monthly fee of \$5.95 will be offered to employees who stay with the program. Participants can visit a company microsite, www.KeepItBalanced.com, to receive monthly fitness tips and nutrition information from Coach Pitino and track their progress based on training regimens customized by age, gender, fitness level and available workout equipment. Yum! Brands operates or franchises nearly 36,000 restaurants worldwide. (*Nation's Restaurant News Online* 12/29/08; *QSR Magazine Online* 12/29/08)

International

Chili's Grill & Bar is set to open its first locations in Guam in 2009. The chain, along with franchisee **Pacific Restaurants LLC**, is currently developing a 100-seat **Chili's Too** restaurant at the **Micronesia Mall** in Dededo as well as a 5,000-sq.-ft. Chili's Grill & Bar at **Guam Premier Outlets** in Tamuning. The Chili's Too unit is slated to open in the second quarter of 2009. The full-size Chili's is currently under construction. (*Guampdn.com* 12/30/08)

Chipotle has announced a new European expansion initiative. As part of its plan to enter the European market, the burrito chain is seeking future development sites in London. Chipotle expects its first London

restaurant to open in late 2009. No other European markets were specified for future development. Denver-based Chipotle currently has more than 800 restaurants across the U.S. (*QSR Magazine Online 1/5/09; Forbes.com 1/12/09*)

Joey's Pizza has detailed expansion plans for Europe. The company's new division, **Joey's Pizza International**, will first expand into Austria and Switzerland using existing German franchisees, and then launch into other European markets through new master franchising agreements. Ten new locations have opened in Germany this year. (*Franchise Key Online 1/5/09; NRA SmartBrief 1/5/09*)

NexCen Brands will open its Marble Slab Creamery concept in the Caribbean. The company has signed a master franchise agreement to open a Marble Slab Creamery unit on the Eastern Caribbean island of St. Lucia. Penetrating the Caribbean market is part of NexCen's plan to expand its international presence. The company previously announced development agreements for 35 Marble Slab units in Mexico, 40 in the U.K., and five in Lebanon. There are currently 57 franchised Marble Slab stores in five international markets: Canada, Bahrain, Kuwait, Lebanon and the United Arab Emirates. (*NRA SmartBrief Online 12/22/08*)

Papa John's has signed a master franchise agreement to expand in Malaysia. Berjaya Pizza Company Sdn Bhd will open 100 stores in the country over the next 10 years. Targeted development areas include the Klang Valley, Penang, Johor, Sabah and Sarawak. Papa John's currently has more than 3,300 outlets in approximately 30 countries, with plans of having at least 3,500 locations worldwide by 2010. (*Yahoo! News Malaysia 1/9/09; Food & Beverage News Online 1/9/09*)

Quiznos plans to expand into India. Under a new franchise agreement, **HMSHost Corp.** will open three units in the country by 2010. The first location is slated to open by the end of 2009 or early 2010. HMSHost, a division of **Autogrill S.p.A.**, currently operates 50 Quiznos restaurants in North America. (*Nation's Restaurant News Online 1/12/09*)

Starbucks' China units will begin serving locally produced coffee. The chain will source coffee beans from Yunnan province, China's largest coffee producing region. If successful, the Yunnan coffee will be promoted in other international markets. With the import tariff on coffee beans as high as 20%, moving to local coffee is one way for Starbucks to reduce costs. Starbucks has worked with Yunnan coffee farmers since 2007 to help them meet sourcing standards. The company currently has more than 620 stores throughout China. (*NRA SmartBrief 1/5/09*)

Restaurant Concepts

Aspen Creek, a new restaurant concept from Texas Roadhouse founder W. Kent Taylor, is scheduled to open in early February in Louisville, KY. The restaurant's décor resembles a rustic mountain lodge, and menu items include pizza, burgers, pasta and chicken. Some employees from the Texas Roadhouse chain have been selected to work at the new Aspen Creek restaurant. If the concept is unsuccessful, Taylor plans to convert the unit into a Texas Roadhouse restaurant. (*Courier-Journal.com 1/11/09; NRA SmartBrief Online 1/12/09*)

Boll Weevil, a family-owned burger chain in Southern California, has filed for Chapter 7 bankruptcy liquidation. In conjunction with the filing, the company shuttered all six corporate stores in Southern California, leaving only four restaurants in the area that are operated by independent licensees. According to the *San Diego Union Tribune*, Boll Weevil listed \$1.1 million in assets and \$2.7 million in liabilities. The 42-year-old Boll Weevil chain, which once had 37 units, previously filed for Chapter 11 bankruptcy, first in 1966 and later in mid-2008. (*Nation's Restaurant News Online 12/16/08*)

Burger Jones, a new restaurant concept from Parasole Restaurant Holdings, will debut this spring in Minneapolis. The concept will feature a wide variety of classic hamburgers with a bevy of toppings and condiments as well as cheeses. Turkey, salmon and buffalo burgers will also be menued. Other menu items include fries and desserts. Parasole's portfolio of concepts includes **Manny's Steakhouse, Salut Bar Americain, Pittsburgh Blue** and **Good Earth**, all of which are located in the Minneapolis-St. Paul area. *(Minneapolis-St. Paul Star Tribune Online 12/24/08)*

Dick's Last Resort has been purchased by Triton Pacific Capital Partners and Ted Moats, co-founder of Logan's Roadhouse. Terms of the deal were not disclosed. This is the first restaurant investment for Triton Pacific Capital Partners, a Los Angeles-based private-equity firm. Dick's Last Resort has six corporate units and one licensed restaurant. Units are located in Boston, Chicago, Dallas, Las Vegas, San Antonio, San Diego and Myrtle Beach, SC. The new owners plan to open between one and three new locations each year. *(Nation's Restaurant News Online 1/8/09; Food & Beverage News Online 1/9/09)*

Friendly's Express, a new concept from Friendly Ice Cream Corp., will debut in New England this year. The fast-casual restaurant concept, designed to reduce costs and expand the availability of the Friendly's concept, will require 2,200 to 2,400 sq. ft., about 1,000 sq. ft. less than a traditional Friendly's restaurant. A scaled-down menu will include burgers, sandwiches and ice cream. The company's current plans are to test three to four Express restaurants in Boston and Springfield, MA, and Providence, RI, and long-term plans are to open 50 units a year within three to five years. Friendly's Ice Cream Corp. currently operates 505 Friendly's units in the U.S. *(Nation's Restaurant News Online 12/15/08)*

Maddio's Pizza Joint, a "New Italian" pizza concept, debuted in Atlanta on New Year's Day. Guests can choose from nine signature pizzas or personalize their pizzas with a choice of whole-wheat or regular dough, one of six homemade sauces, and more than 45 toppings. Salads, toasted subs, dessert pizza and a kids' meal are also offered. Beer and wine are served. The restaurant was created by **Moe's Southwest Grill** co-founder Matt Andrew and his partner Tony Lewis. *(QSR Magazine 12/29/08; NRA SmartBrief 12/30/08)*

The Rainbow Room at Rockefeller Center in New York City will stay open temporarily despite a recent eviction notice. A judge is allowing the Cipriani family, owners of the Rainbow Room for the past 10 years, to remain in business until at least the end of January. Landlord **Tishman Speyer Properties** gave the Cipriani family three days to vacate the space at the beginning of the year. The Cipriani family had failed to pay rent since September. According to the *New York Daily News*, Tishman Speyer doubled the restaurant's rent to \$8.7 million a year. The Rainbow Room, located on the 65th floor at 30 Rockefeller Plaza, debuted in 1934 *(Foodservice.com 1/7/09; Nation's Restaurant News Online 1/14/09)*

Smashburger will expand in Texas and New Mexico after signing its third franchisee and Founders Club member. Under the deal, San Antonio-based **SB Alamo Development LLC** will open 45 stores in the state over the next eight years, with the first unit slated to open in San Antonio by spring 2009. Smashburger's Founders Club is reserved for the company's first five large franchisees, who will be able to give input on the future direction of Smashburger and will act as field counsel on critical decisions as Smashburger grows. Denver-based Smashburger currently has 10 units in Colorado, Kansas and Texas. *(QSR Magazine Online 1/13/09; Business Wire 1/13/09)*

Specialty's, a San Francisco-based bakery café chain, plans to add between 10 and 14 new locations during the 2009–2010 fiscal year. The chain has already signed deals for seven new restaurants. The 22-unit chain operates 14 San Francisco Bay Area stores, seven Seattle stores and one Chicago unit. Select Specialty's units are licensed to sell **Peet's Coffee & Tea** products in stores. *(San Francisco Business Times 12/26/08; Food & Beverage News Online 12/29/08)*

Texenza, an independent coffee retailer, is expanding across Texas. The chain's name is a combination of Texas and *essenza*, the Italian word for "essence." Menu offerings include sandwiches, breakfast tacos, tea, lattes and coffee. Texenza sources its coffee beans from Sumner, WA-based **Dillanos Coffee Roasters Inc.** Austin, TX-based **RTG Business Enterprises LP**, a former franchise operator of Seattle's Best, has 12 stores in the central Texas area, many of which were former **Seattle's Best** locations. (*Austin Business Journal Online 1/5/09*)

U-Swirl Frozen Yogurt will expand in the Las Vegas market. The company plans to open an undisclosed number of corporate stores in the region throughout 2009. Several locations are under development with openings slated for this spring. **U-Swirl International**, a wholly owned subsidiary of **Healthy Fast Food Inc.**, currently operates a single self-serve U-Swirl store in Henderson, NV. (*Restaurant News Resource 12/17/08; Food & Beverage News Online 12/17/08*)

Independents

Jaime Oliver, a celebrity chef, is launching a new chain of food stores called Recipease. The new concept is designed to encourage people to take an interest in food and cooking by allowing customers to prepare their own dishes for home consumption under the guidance of professional chefs. Ready-made meals will also be available for purchase. Oliver will open his first Recipease shop in Battersea, South London, by the end of February. He plans to expand the concept across the U.K. over the next few years. (*Restaurants & Institutions Online 1/13/09*)

Jason Dady, a San Antonio chef and restaurateur, will open his fourth restaurant concept, Two Bros. BBQ Market. The new restaurant is a barbecue joint that emphasizes family dining and plate-sharing. Dady's other San Antonio restaurants are **The Lodge**, a French-inspired concept; **Bin 555**, a tapas and small-plates restaurant; and **Tre Trattoria**, which features Northern Italian/Tuscan-style cuisine. (*San Antonio Business Journal Online 12/26/08; NRA SmartBrief Online 12/29/08*)

Tom Colicchio and his executive chef, Damon Wise, are offering a series of Friday night value-priced dinners at Craft restaurant in New York City. The program, dubbed "**Damon: Frugal Friday**," features a menu of \$10-or-under dishes and drinks, prepared live by Chef Wise. The menu offers eight categories of dishes: small pizzas, food in a jar, meat on a stick, offal, snacks, salads, cheese, and small plates. Sample dishes include salt-cod fritters; caper berries and piquillo marmalade; pizza with fresh ricotta, black cabbage and truffle vinaigrette; crispy pig ear, deviled egg salad and celery; and smoked beef tartare with spiced flatbread. Reservations are not accepted. The dinners occur in the same private-dining room where Colicchio hosts his bi-monthly **Tom: Tuesday Dinner** program. (*NRA SmartBrief 1/13/09*)

Wolfgang Puck's new fine-dining restaurant, Five-Sixty by Wolfgang Puck, is set to debut in Dallas in late January. Located atop Dallas' 560-ft.-tall **Reunion Tower** building, the 200-seat restaurant features two bars inside the rotating dining room, which provides guests with a 360-degree view of the city. The menu spotlights Asian-influenced cuisine and an extensive wine list with more than 400 labels from around the world. (*Company Release 12/22/08; DFW.com 12/15/08*)

Vending

YoNaturals is adding vending machines with healthy food offerings in the Springfield, IL, area. The San Diego, CA-based company has entered into agreements with **White Oaks Mall**, the Springfield Park District's

Nelson Center and **Gold's Gym** to install vending machines onsite. YoNaturals offers more than 300 natural and organic food and beverage products that feature lower amounts of fat, salt and sugar content. *(QSR Magazine Online 12/22/08)*

Retail

Jamba Juice parent Jamba Inc. has suspended its ready-to-drink retail beverage products due to manufacturing issues. The company halted production of the beverages due to what it called “consistent manufacturing and inventory issues,” but plans to redesign the program and continue making and selling the drinks in the future. The retail beverage products, created through a partnership with **Nestle SA**, were rolled out in grocery stores and c-stores last summer throughout Arizona, California, Colorado, Idaho, Nevada, Utah and Washington. *(Nation's Restaurant News Online 12/24/08; NRA SmartBrief 1/5/08)*

Walmart stores are now selling Little Caesars Pizza gift cards in 29 states. The gift cards, available in \$10 denominations, are pre-loaded and activated at Walmart checkout counters. They are sold to Walmart below their face value to compensate the retailer for shelf space and promotional activity. Little Caesars currently sells its gift cards in more than 30,000 retail locations, including **Rite Aid**, **Winn Dixie**, **Dollar General** and **Valero** stores. Detroit, MI-based **Little Caesars Enterprises Inc.** operates or franchises more than 2,400 restaurants in the U.S. *(Nation's Restaurant News Online 12/24/08; QSR Magazine Online 12/23/08)*

Recreation

Anheuser-Busch Adventure Parks will open new restaurants and food venues at its theme parks across the U.S. **SeaWorld** theme parks in Orlando, San Antonio and San Diego and **Busch Gardens** parks in Tampa, FL, and Williamsburg, VA, will add an unspecified number of restaurants to broaden the company's family appeal. In addition, the parks will stop giving away free beer samples. Anheuser-Busch has not disclosed whether the Adventure Parks will continue to sell beer. *(USA Today Online 1/7/08; Food & Beverage News Online 1/6/09)*

Disney World has debuted a new restaurant, Contempo Café, in its Contemporary Resort Hotel. The 147-seat concept features counter service with touch-screen menus for guests to place their orders. Breakfast, lunch and dinner menus are available, with options including thin-crust pizzas, deli sandwiches, soups, vegetarian entrées and pastas. A grab-and-go unit offers salads, fruit and drinks for after-hour patrons. The café replaced the hotel's former full-service restaurant, **Concourse Steakhouse**. *(Orlando Sentinel Online 12/29/08; NRA SmartBrief 12/29/08)*

The National Hockey League U.S. has signed McDonald's as its official quick-service restaurant. The deal, an extension of a three-year sponsorship agreement McDonald's has with the NHL in Canada, will span the remaining 18 months of the existing contract. Under the deal, the NHL will donate money to Ronald McDonald House Charities, and McDonald's will host contests during NHL games as well as advertise on the NHL Network and NHL.com. *(Promo.com 12/29/08)*

Regal Entertainment Group has teamed with Brinker International Inc. to offer a new dinner and a movie promotion in retail outlets. The \$50 “movie and a meal” promotion includes a \$25 gift card for any of Brinker's casual-dining concepts and a \$25 Regal movie gift card. Restaurants accepting the gift card include **Chili's Grill & Bar**, **Romano's Macaroni Grill**, **On The Border Mexican Grill & Cantina**

and **Maggiano's Little Italy**. The movie card is redeemable at Regal Cinemas, United Artists Theatres and Edwards Theatres. The cards are available nationwide at participating retail outlets such as **Walmart, Longs, Raley's** and **Duane Reade**. *(Nation's Restaurant News Online 12/24/08)*

Colleges/Universities

California State Polytechnic University in Pomona, CA, will open a new building for its hospitality school. Jim Collins, chairman emeritus of **Sizzler**, and his wife, Carol, have pledged to match \$5 million in donations for a \$10-million, environmentally friendly academic building to house the **Collins College of Hospitality Management**. The college is named for the Collinses, who have been major benefactors over the past 20 years. Cal Poly, the oldest and largest school in California to offer a four-year hospitality management program, is in the process of developing California's first graduate program in hospitality management.

(Nation's Restaurant News Online 12/15/08)

Government

White House executive chef Cristeta Comerford, will retain her position during the Obama administration. Comerford, a Filipina-American, is the first woman and the first minority to serve as White House executive chef. Comerford studied French cooking in Vienna, Austria, and specializes in both ethnic and American cuisine. *(Restaurants & Institutions Online 1/11/09)*

Utah State Prison is giving its inmates the opportunity to be educated in the culinary field. Several inmates are enrolled in **Salt Lake Community College's** culinary arts program and are working toward associate's degrees as chefs. The credential should help them find jobs in restaurants after being released. The program was first offered to male inmates in 2007, and there were 44 participants enrolled for 2008. The inmates, who pay tuition and attend classes, learn about nutrition, business, budgeting and customer service. To demonstrate their skills, the inmates cooked a feast for nearly 100 corrections staffers and volunteers at the prison's Promontory facility. Offerings included canapés, stuffed figs and Chicken Oscar. *(Restaurants & Institutions Online 12/14/08)*

Transportation

Chicago's O'Hare International Airport has opened a Stefani's Tuscany Café at Terminal 1, Concourse B. The restaurant was opened through a partnership between **HMSHost**, the Chicago Airport System and chain founder Phil Stefani. The sit-down unit offers a trattoria and bar serving Northern Italian-inspired dishes including homemade pastas, gourmet pizzas and wines. *(Company Release 12/5/08)*

Foodservice Management

Compass Group North America has acquired KIMCO Corp. for an undisclosed sum. Harwood Heights, IL-based KIMCO, which offers janitorial and other support services for business customers in 37 states, will now be a wholly owned subsidiary of Compass Group North America's **Eurest Services** division. *(Yahoo! Finance 1/6/09; PR Newswire 1/6/09)*

Distributors

Ritz Food Service, a food distributor for restaurants, schools and healthcare centers across Northern California, has closed. The Santa Rosa, CA-company notified its employees via voicemail or email that operations were shutting down after a half-century of business. (*The Press Democrat Online 1/13/09; Food & Beverage News Online 1/14/09*)

Ecommerce/Technology

Facebook has disabled Burger King's newest online application, the "Whopper Sacrifice." The promotion, introduced in early January, invited Facebook users to dump their "friends" by sending messages that declared food to be stronger than friendship. Burger King rewarded anyone who removed 10 friends with a coupon for a free Whopper sandwich. Facebook disabled the Whopper Sacrifice based on privacy concerns and violation of the company's "defriending" policies. Roughly 82,000 people downloaded the application from whoppersacrifice.com or Facebook.com and used it to delete more than 230,000 online friendships. Burger King's ad agency, **Crispin Porter + Bogusky of Miami**, created the application.

(*Nation's Restaurant News Online 1/8/09; Nation's Restaurant News Online 1/15/09*)

Subway has teamed with Torex Retail Holdings Limited to implement a new point-of-sales system. The Torex Quick Service Restaurant POS is intended to minimize risk, control costs, increase productivity and improve customer service. Subway plans to have Torex installed in more than 30,000 restaurants in 87 countries. (*QSR Magazine Online 1/12/09; Business Wire 1/12/09*)

Noteworthy

Los Angeles' Arts, Parks, Health and Aging Committee has proposed to ban smoking on restaurant patios or within 10 feet of any outdoor foodservice establishment. Bars with outdoor areas, as well as other over-18 venues, would be exempted. In order to become law, the measure must be approved by the full City Council. California has banned smoking in restaurants, bars and workplaces, and Los Angeles has also banned smoking at city beaches, parks, fields, picnic areas, sports courts and farmers' markets. (*LA Times Online 1/8/09*)

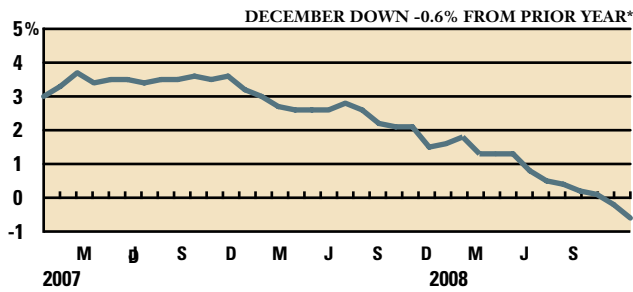
Massachusetts and New York are considering implementing statewide menu-labeling laws similar to California's recently enacted measure. Chain restaurants with 15 or more units would be required to post calorie counts on menus and menu boards. New York Governor David Paterson is also seeking to ban trans fats in restaurants, tax sugared beverages and discontinue sales of "junk food" in schools. According to the *Boston Globe*, Massachusetts' menu-labeling rule could affect about 2,000 restaurants statewide. (*Nation's Restaurant News Online 1/8/09*)

New York City restaurant Hayashi Ya is fining its customers for unfinished food. The Japanese restaurant offers an all-you-can-eat buffet for \$26.95 per person, but a 30% surcharge, or roughly \$8, is added for any leftover food. The policy has been in effect for roughly two years. According to a **Stockholm Water Institute** study, approximately 30% of food in the U.S. is wasted, costing about \$48 billion annually. (*Foodservice.com 12/16/08*)

Philadelphia is the newest city to initiate a menu labeling law. The city's mayor, Michael Nutter, has signed a bill that requires chains with 15 or more stores nationwide to post calorie counts, fat content and other nutrition information on menus as of January 1, 2010. Chain restaurants with menu boards are only required to display calorie counts but must make the other information available to customers through other means. (*Nation's Restaurant News Online 12/19/08; Foodservice.com 12/19/09*)

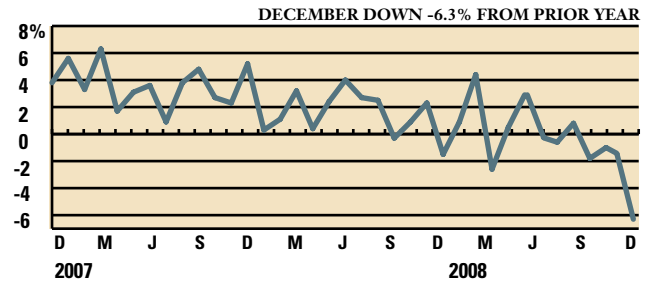
RESTAURANT INDUSTRY & ECONOMIC TREND DATA

12-Month Moving Average (Foodservice & Drinking Places Real Sales)



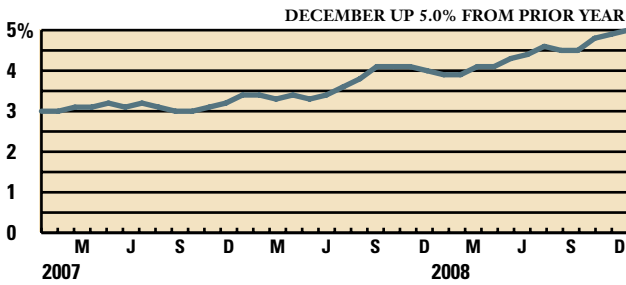
Source: U.S. Census Bureau
*Subject to revision

Foodservice & Drinking Places Real Growth



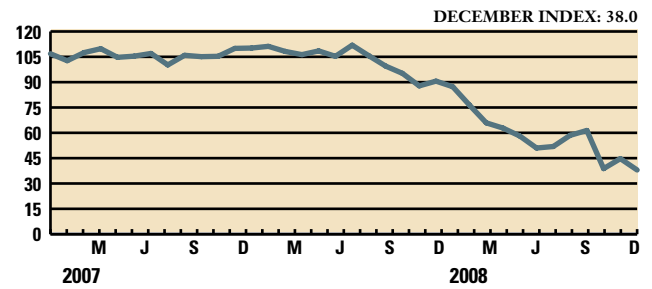
Source: U.S. Census Bureau

CPI: Food-Away-From-Home Monthly % Change



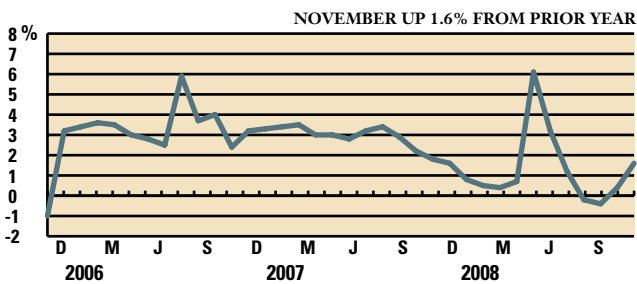
Source: U.S. Dept. of Labor

Consumer Confidence Index (Base 1985=100)



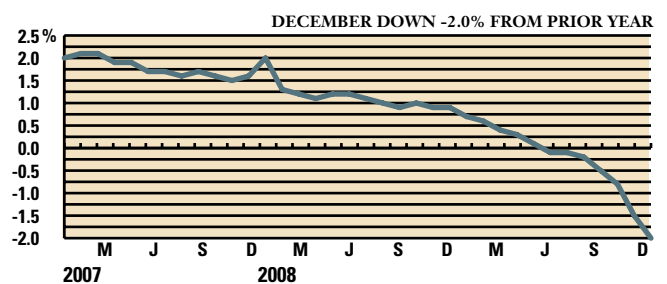
Source: Conference Board

Real Disposable Personal Income Growth



Source: U.S. Dept. of Commerce

Employment Growth: Total Non-Farm



Source: U.S. Dept. of Labor

Additional Market Data

Lodging: Rooms Sold¹

	% Change vs. Year Ago
Year-to-Date (11 months)	-1.5%
November 2008	-7.8%

Domestic Airline Passenger Miles²

	% Change vs. Year Ago
Year-to-Date (10 months)	-3.1%
October 2008	-8.6%

Vehicle Miles Traveled, All Systems³

	% Change vs. Year Ago
Year-to-Date (10 months)	-3.5%
October 2008	-3.5%

¹ Smith Travel Research

² Bureau of Transportation Statistics

³ U.S. Department of Transportation

12-Month Moving Average (Foodservice & Drinking Places Real Sales)

Year	Month	% Change vs. Year Ago	Year	Month	% Change vs. Year Ago
2005	October	+2.4	2008	June	+2.6
2005	November	+2.7	2008	July	+2.8
2005	December	+2.6	2008	August	+2.6
2006	January	+3.0	2008	September	+2.2
2006	February	+3.3	2008	October	+2.1
2006	March	+3.7	2008	November	+2.1
2006	April	+3.4	2008	December	+1.5
2006	May	+3.5	2008	January	+1.6
2006	June	+3.5	2008	February	+1.8
2006	July	+3.4	2008	March	+1.3
2006	August	+3.5	2008	April	+1.3
2006	September	+3.5	2008	May	+1.3
2006	October	+3.6	2008	June	+0.8
2006	November	+3.5	2008	July	+0.5
2006	December	+3.6	2008	August	+0.4
2007	March	+2.7	2008	September	+0.2
2007	April	+2.6	2008	October	+0.1
2007	May	+2.6	2008	November	-0.2
			2008	December	-0.6

Source: U.S. Census Bureau

Names Making Foodservice News

OPERATORS

California Pizza Kitchen

SUE COLLYNS

Executive VP and COO

CEC Entertainment Inc.

MICHAEL BEACHAM

Senior VP and COO, International Development

CKE Restaurants Inc.

E. MICHAEL MURPHY

President, Chief Legal Officer

Jamba Inc.

SUSAN SHIELDS

VP, Consumer Products, Licensing and Growth Initiatives

McAlister's

BILL MCCLINTOCK

Senior VP, Development

McDonald's Corp.

DAN GORSKY

Senior VP, North America Supply Chain Management

P.F. Chang's China Bistro Inc.

ROBERT VIVIAN

Co-CEO

Pizza Fusion

JERRY WODA

Chief Financial Officer

Pizza Hut

BARON CONCORS

Chief Information Officer

DISTRIBUTORS

Food Services of America

LEE CLARK

Senior VP, Finance, and CFO

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