



**Restaurant Industry:
Nutrition & Healthy Choices**

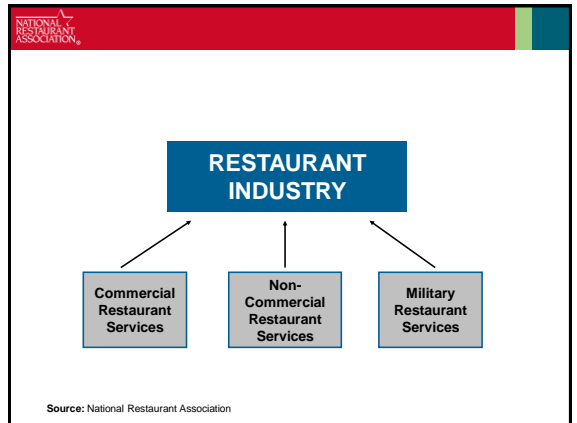
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2009 Consumer Issues Conference
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DEFINITION:

“Restaurant Industry”

All meals/snacks prepared away from home, including all takeout meals and beverages.



The Industry Mosaic

- Fullservice
- Quickservice
- Cafeterias and buffets
- Caterers
- Snack and nonalcoholic beverage bars
- Managed services/contractors at
 - Industrial plants
 - Hospital/nursing homes
 - Schools and universities
 - Airlines
 - Recreation and sports centers
- Lodging places
- Retail hosts
 - Book stores
 - Service stations
 - Convenience stores
- Self-operated restaurant services
- Military restaurant services

Annual Sales:

\$566 billion

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Employees:

13 million

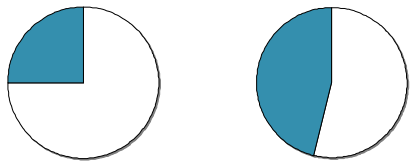
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Locations:

945,000

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Restaurant Industry's Share of the Food Dollar



1955: **25%** Present: **48.0%**

Source: National Restaurant Association

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2009-2013 Strategic Plan

Industry Imperatives

- Jobs & Careers
- Food & Healthy Living
- Sustainability & Social Responsibility
- Profitability & Entrepreneurship

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Food & Healthy Living

The Association needs to be involved from "farm to fork" to help drive industry and regulatory change to meet the growing demands of safety and nutrition.

IMPACT GOALS:

- Increase food & alcohol safety/security in the industry.
- Increase restaurant nutrition information availability and consumer awareness.
- Improve public perceptions of the restaurant industry relating to food & healthy living

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Food & Healthy Living

Strategies:

- Advocate for measures that ensure that global food supply sources are delivered safely and securely to the restaurant industry from farm to table.
- Develop communications protocols that enable restaurants to respond quickly to food safety warnings and recalls.
- Promote food safety training standards for restaurant managers and workers nationally.
- Advocate for enactment of national standards for menu labeling.
- Market and develop resources/products that give restaurant owners capacity to provide nutrition information for their menus.

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TASTE RULES!

Two of three consumers agree their favorite restaurant foods provide flavor and taste sensations that cannot easily be duplicated in their home kitchen.

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Restaurants: Industry of Choice

- 70 percent of restaurant customers customize their meals.
- 70 percent agree there are enough portion sizes for those watching calories and fat.
- 95 percent agree restaurants are responsive to special requests.
- Nearly 80 percent of customers say they are comfortable asking for foods specially prepared.

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Proportion of adults who say they are trying to eat healthier now at restaurants than they did two years ago

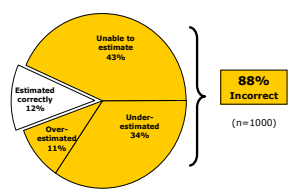
All adults	76%
Women	79%
Men	72%

Source: National Restaurant Association, October 2007

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Consumers: Limited Knowledge of Calorie Needs per Day

As far as you know, how many calories should a person of your age, weight, and height consume per day?



(n=1000)

- International Food Information Council, 2008

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Restaurants Collaborate

- The Association worked closely with both the Department of Health and Human Services (HHS) and USDA, submitting comments and ideas for consideration as part of the new Dietary Guidelines for Americans (released in January 05') and the new Food Guidance System.
- The USDA's new food guidance system can be viewed on the Web at www.mypyramid.gov – and can help individuals choose foods in sizes and amounts that are most appropriate for them.
- The industry also worked with the Federal Food and Drug Administration (FDA) on the 2009 Model Food Code. The model food code provides states & localities with a scientifically sound guidance for regulating the retail and foodservice segments.

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A sampling of participating restaurants



Food Safety Thrives When You Focus On Five!

- The National Restaurant Association encourages restaurant and foodservice operators to begin planning for the 15th annual **National Food Safety Education Month**. This month-long campaign is held every September and focuses on the importance of food safety education for the restaurant and foodservice industry, while raising the awareness of the industry's commitment to food safety. This year's theme is "Food Safety Thrives When You Focus on Five."
- The free National Food Safety Education Month materials are based on the [ServSafe](#) food safety training and certification program. The materials communicate concepts clearly and quickly to employees, and activities can be completed in less than 10 minutes.

Restaurants Respond to Consumer Demand

- Whether it was low fat, fat free, low carb, high fiber, low sugar, our nation's restaurants have created hundreds of menu items to meet the growing needs of our customers.
- From farms to food manufacturers, foodservice distributors to restaurants, our entire food chain is involved in the effort of reducing and eliminating *artificial trans fats*.
- Almost all of the national chains have reduced or eliminated artificial trans fats in their offerings.**

Restaurants are Health and Wellness Leaders

- Companies like **Uno Chicago Grill** and **Au Bon Pain** offer guests access to full, customizable nutrition information kiosks in their stores. Each nutritional kiosk allows customers to quickly determine the dietary composition of any dish.
- Pizza Hut** introduced the Fit 'N Delicious pizza – a better-for-you pizza with about 25% less fat than its comparable Thin 'N Crispy pizza. The key difference: less cheese, more sauce and fewer indulgent toppings. The pizza also has 30 fewer calories per slice.
- Red Lobster** offers a "LightHouse Menu" providing guests with nutritional information for some of Red Lobster's most popular menu items. The menu lists more than 30 items – including numerous entrées, accompaniments, side dishes, dipping sauce and beverages – with the caloric, carbohydrate and fat content for each.
- Romano's Macaroni Grill** offers "Sensible Fare."
- Cheesecake Factory** offers "Weight Management" menu options.
- Taco Bell** offers their Fresco Menu with 9 Taco Bell favorites under 9 grams of fat.

Restaurants are Health and Wellness Leaders

- McDonald's** fresh salads have become such a popular menu item that it is currently the leading purchaser of lettuce heads in the U.S. – ahead of grocery chains and other retail providers. The brand also offers its Apple Dippers with low-fat milk.
- Applebee's** has teamed up with Weight Watchers to offer a menu that identifies better-for-you choices for those who are looking to eat more healthfully.
- T.G.I. Friday's** unveiled a "Right Portion, Right Price" menu last year offering smaller portions of several menu items at a lower cost.
- Chili's** has its "Guiltless Grill."
- Burger King** recently launched their new BK Fresh Apple Fries. The red apples are cut to resemble french fries and are served in the same containers as fries, but they are not fried and are served skinless and cold. The 2.4-ounce serving of Apple Fries will have 35 calories and can be selected as a side order for all kids and adult meals.
- Mimi's Café** has a low-carb, low-fat "Lifestyle Menu."

Hot / Trendy Food Offerings

Fullservice Restaurants

- 1 Locally grown produce
- 2 Bite size desserts
- 3 Organic produce
- 4 Nutritionally-balanced children's dishes
- 5 New/fabricated cuts of meat (e.g. Denver steak, pork flat iron, bone-in Tuscan veal chop)

Source: National Restaurant Association; American Culinary Federation

Hot / Trendy Food Offerings

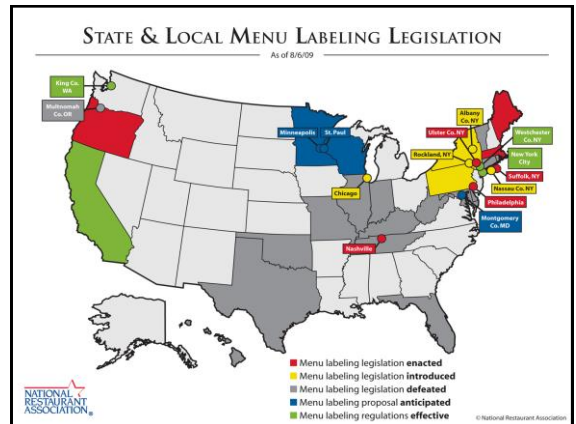
Quickservice Restaurants

- 1 Healthy options in kids meals
- 2 Organic items
- 3 Locally-sources items
- 4 Spicy items
- 5 Wraps/pitas/tortillas

Source: National Restaurant Association, Quickservice Restaurant Survey

Menu Labeling/Nutrition Disclosure

- Independent restaurants may elect to be subject to the federal requirements by registering biannually with FDA and complying with the federal menu labeling requirements.
- Without a national standard an estimated 30-40 states & localities could establish their own competing standards.**
- When would the draft legislation take effect?* Upon enactment, though mandatory requirements are not expected to take effect until after FDA finalizes its regulations. The legislation directs FDA to propose full regulations within one year.



Public Opinions on the Issue

- Among voters, the approach that garners the strongest and most wide-ranging support is one requiring detailed nutritional information and allowing restaurants to decide the best way to provide that information to their customers.
 - 79% favor a law that would require restaurants to provide detailed nutrition information in writing, though not necessarily on the menu.
- Consumers own up to their responsibility when it comes to the choices they make when dining out and most would like restaurants and not the government to decide what information to provide and how to provide it.
 - 83% of voters say people who eat at restaurants bear the most responsibility, just 11% say restaurants, and only 5% say the government.

- June 2008, Hart Research Associates, Inc. National Survey

Sodium Reduction Efforts in US Foods

- Using different spices and ingredients as substitutes for salt and other condiments.
- Chef education.
- Offering more fresh produce items on menus.
- Switching to reduced-sodium (i.e., soy sauce), and/or no-salt-added ingredients .
- Working with suppliers to reformulate and gradually decrease sodium.
- Looking for new solutions, such as value added produce with a custom packed sauce (that is lower in sodium).
- Working with the American Heart Association.

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