

The Concession  
& Hospitality Expo

July 15-18  
2014

Denver Marriott City Center  
Denver, CO



Serving the Vending, Coffee Service & Foodservice Management Industries

---

Dan Mathews, EVP & COO





## Constituents:

- 1600 Member Companies
- 1200 Operator Companies

\$6M Annual Revenues

23 Employees

( Chicago – Washington, DC – Los Angeles – Atlanta)

NAMA OneShow – 5000 attendees; 250 Exhibitors

Coffee-Tea-Water – 800 attendees; 120 Exhibitors

Foundation Capital Campaign - \$5.2M



# NAMA Industry Statistics

VENDING SALES  
**\$40B**

RETAIL MICRO  
MARKET SALES  
**\$260M**

COFFEE/TEA/WATER  
SALES  
**\$5B**

Cashless  
Payment  
Systems  
**10%**

VENDING  
MACHINES  
**5+ M**

# NAMA Strategic Pillars

<b>ADVOCACY</b>	Leading Industry Advocate
<b>EDUCATION</b>	Top Education Provider
<b>INFORMATION</b>	Definitive Source of Information
<b>NETWORK</b>	Essential Business Forum
<b>FOUNDATION</b>	Research, Scholarships, Stewardship, Sustainability

The Concession  
& Hospitality Expo

July 15-18  
2014

Denver Marriott City Center  
Denver, CO



NATIONAL ASSOCIATION OF  
**NAC**  
CONCESSIONAIRES

# Supply Chain



**BLENDED  
OPERATOR**



**NUTRITION &  
WELLNESS**

**CONSUMER &  
WORKPLACE  
TRENDS**

**OPPORTUNITIES  
&  
CHALLENGES**

**Education**

**GOVERNMENT  
INTERVENTION**

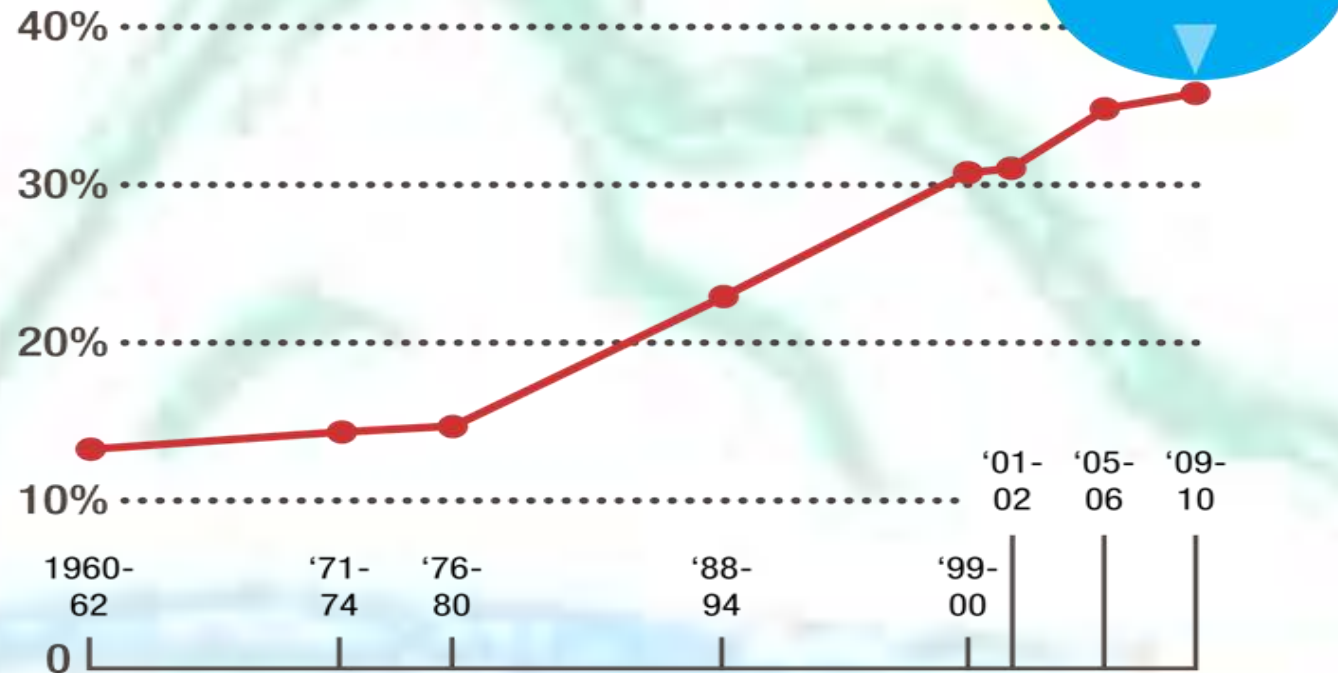
# Nutrition & Wellness





# Food & Beverage Trends

Age-adjusted prevalence of obesity among  
U.S. adults aged 20-74



Source: CDC; NCHS, National Health  
Examination Surveys

The Concession  
& Hospitality Expo

July 15-18  
2014

Denver Marriott City Center  
Denver, CO

# The American Diet is Becoming Healthier



**118**  
fewer calories  
a day than  
**FOUR YEARS AGO**

NATIONAL ASSOCIATION OF  
**NAC**  
CONCESSIONAIRES

# New Nutrition Labeling Requirements

**CURRENT**

<b>Nutrition Facts</b>			
Serving Size 2/3 cup (55g)			
Servings Per Container About 8			
Amount Per Serving			
<b>Calories</b> 230	Calories from Fat 40		
	% Daily Value*		
<b>Total Fat</b> 8g			<b>12%</b>
Saturated Fat 1g			<b>5%</b>
Trans Fat 0g			
<b>Cholesterol</b> 0mg			<b>0%</b>
<b>Sodium</b> 160mg			<b>7%</b>
<b>Total Carbohydrate</b> 37g			<b>12%</b>
Dietary Fiber 4g			<b>14%</b>
Sugars 1g			
<b>Protein</b> 3g			
Vitamin D			10%
Calcium			20%
Iron			45%
Potassium			5%
* Percent Daily Values are based on a 2,000 calorie diet. Your daily values may be higher or lower depending on your calorie needs.			
	Calories:	2,000	2,500
Total Fat	Less Than	65g	80g
Sat Fat	Less Than	20g	25g
Cholesterol	Less Than	300mg	300mg
Sodium	Less Than	2,400mg	2,400mg
Total Carbohydrate		300g	375g
Dietary Fiber		25g	30g

**SERVINGS**  
LARGER, BOLDER TYPE

**SERVING SIZE**  
UPDATED

**CALORIES**  
LARGER TYPE

**DAILY VALUES**  
% COMES FIRST

**ADDED SUGARS**  
NEW

**NUTRIENTS**  
AMOUNT DECLARED

<b>Nutrition Facts</b>	
<b>8 servings per container</b>	
Serving size	2/3 cup (55g)
Amount per 2/3 cup	
<b>Calories</b>	<b>230</b>
% DV*	
<b>12%</b>	<b>Total Fat</b> 8g
<b>5%</b>	Saturated Fat 1g
	Trans Fat 0g
<b>0%</b>	<b>Cholesterol</b> 0mg
<b>7%</b>	<b>Sodium</b> 160mg
<b>12%</b>	<b>Total Carbs</b> 37g
<b>14%</b>	Dietary Fiber 4g
	Sugars 1g
	Added Sugars 0g
	<b>Protein</b> 3g
<b>10%</b>	<b>Vitamin D</b> 2mcg
<b>20%</b>	<b>Calcium</b> 260mg
<b>45%</b>	<b>Iron</b> 8mg
<b>5%</b>	<b>Potassium</b> 235mg
* Footnote on Daily Values (DV) and calories reference to be inserted here.	

**PROPOSED**



# Nutrition & Wellness Resources

**NAMA** NUTRITION & WELLNESS CENTER

OUR COMMITMENT

FIT PICK

MICRO MARKETS

FAST FACTS

RESOURCES

NEWS

SUCCESS STORIES

NAMA WEBSITE



fit  
pick<sup>®</sup>  
fitpick.org

NUTRITION  
ADVISORY  
COUNCIL

NATIONAL ASSOCIATION OF  
**NAC**  
CONCESSIONAIRES

**The Concession  
& Hospitality Expo**

July 15-18  
**2014**

  
Denver Marriott City Center  
Denver, CO

# **fitpick** Message Map

**FitPick™**  
is a nationwide  
industry  
program

**FitPick™ allows  
consumers to  
easily make  
“better for you”  
snack choices.**

**FitPick™  
products meet  
the latest  
government  
nutrition  
standards**



# Coalition Building





# More Consumers are Paying Attention

64%

say it's important to  
**EAT HEALTHY**  
and pay attention  
to **NUTRITION**

50%

would use vending machines  
with **HEALTHY FOOD**  
**OPTIONS**  
**MORE OFTEN**



The Concession  
& Hospitality Expo

July 15-18  
2014

Denver Marriott City Center  
Denver, CO

# Food is Part of Life's Memorable Moments



**COMPANY  
BREAK ROOM**  
is a  
**COMPETITIVE  
ADVANTAGE**  
for employers

NATIONAL ASSOCIATION OF  
**NAC**  
CONCESSIONAIRES

# Embracing New Payment Technology



# Coffee Tea & Water

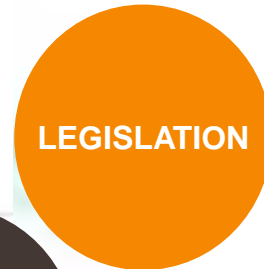
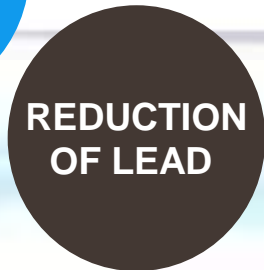


**50%**

of employees  
would drink more coffee  
**IN THE OFFICE**  
if given the option to make  
espresso or lattes

**\$5B  
INDUSTRY**





# Industry and Public Official Interaction





# Key Issue Management



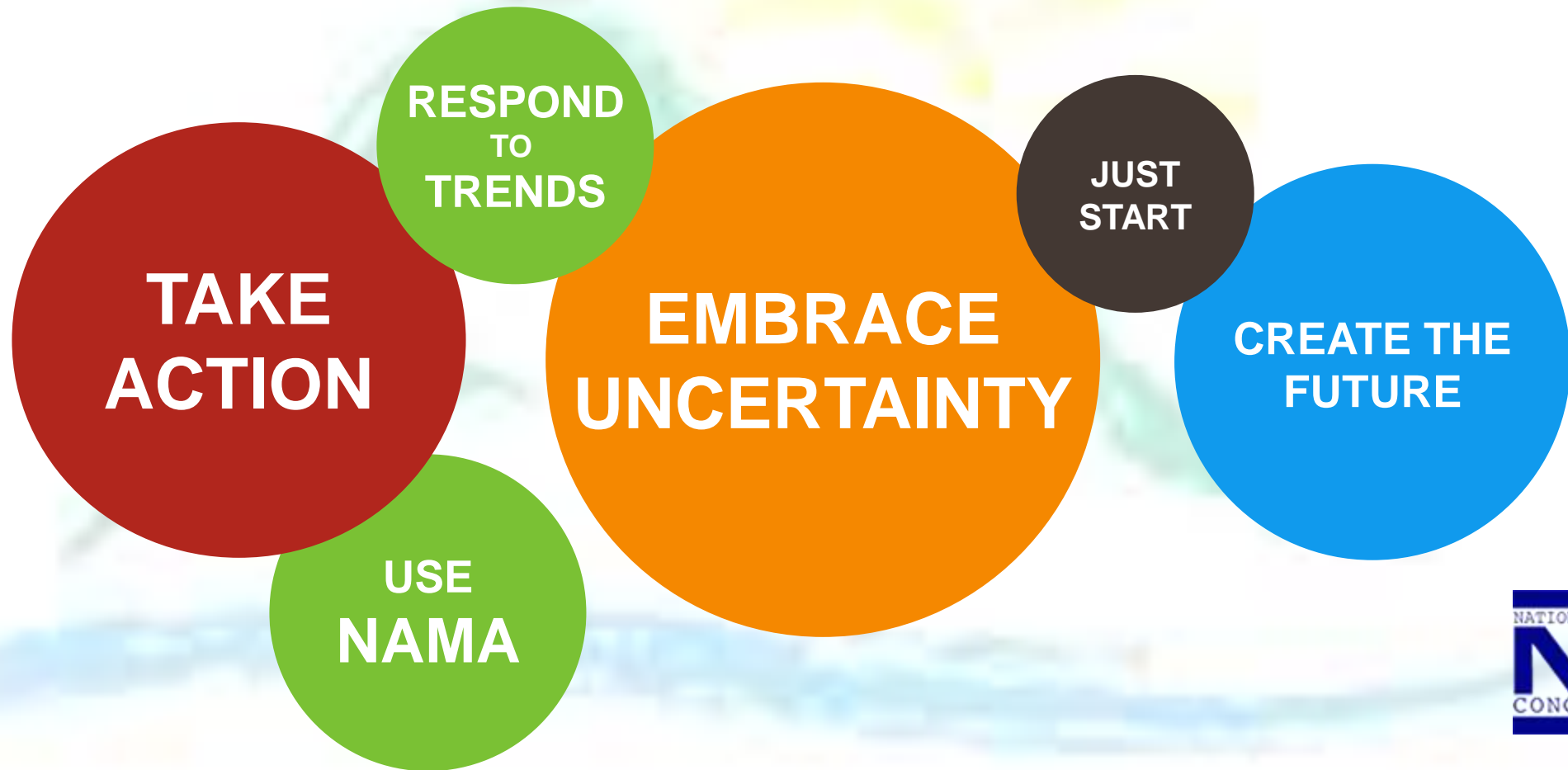
**POSITIVE  
GUIDANCE for  
REGULATORS**

# We Speak Up for NAMA Members



# Encourage Industry To:

---



The Concession  
& Hospitality Expo

July 15-18  
2014

Denver Marriott City Center  
Denver, CO



NATIONAL ASSOCIATION OF  
**NAC**  
CONCESSIONAIRES