



NON-COMMERCIAL DINING SPACES

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The non-commercial foodservice industry is a \$200 billion industry covering all sectors outside of grocery retail, convenience stores, and restaurants. Non-commercial foodservice operations include the 10 sectors noted below, among others. Some of these entities focus on a trend known as hyper-local food sourcing.

1. **Colleges and University Dining:** Most of the 5,000 colleges in the U.S., ranging from private Ivy League universities to public four-year colleges, possess a non-commercial foodservice program. The 18- to 25-year-old demographic is very desirable in terms of building a brand. This demographic is open to trying new foods from around the globe, and they often use food to self-identify and share on various social media platforms.
2. **Hospitals** of various sizes offer foodservice programs for patients, staff, and the public. Large hospitals are especially attractive venues to showcase food and beverage concepts, both for the retail side that services the staff and visitors, and for the in-patient foodservice operations.
3. **Military and Department of Defense**, which includes the individual service branches, manage bountiful budgets for food and beverage as well as other types of consumer products. Large military and air bases operate retail stores under their Army and Air Force Exchange Service (AAFES). The U.S. Coast Guard, part of the Department of Homeland Security, operates food services for their personnel.
4. **Business and Industry (B&I)** offers foodservice programs that serve private corporate offices, industry, and other workplaces including government offices. Many large organizations and government offices maintain some form of foodservice offerings that F&B concepts can access.
5. **Group Purchasing Organizations (GPOs)** are vital gatekeepers and intermediaries for non-commercial foodservice operations to partner with. GPOs negotiate discounts on various products and services through group buying power. Institutions such as hospitals, CCRCs, and universities utilize GPOs as a way to save money.
6. **Correctional Facilities** must meet the foodservice needs of incarcerated inmates and facility employees. Since food is typically forbidden from being brought in, the dining program is an important component of the correctional or prison system. Dining services play a vital role in maintaining inmate morale in a difficult environment.
7. **Continuing Care Retirement Communities (CCRCs):** Retirement communities with their non-commercial dining options are becoming more prevalent since the Baby Boomers have reached retirement age. CCRCs can resemble resort-style living and cater to guests who are very active. These communities strive to fulfill individuals' needs for activities, accommodations, and fine food.
8. **Contract Management Companies** are businesses that operate non-commercial food service for other organizations as a business model. National and regional foodservice management companies are some of the biggest. A large percentage of non-commercial locations are managed by these contract management companies.
9. **Sports and Entertainment Arenas** provide non-commercial dining options when their patrons are enjoying a sports event or concert. Offerings range from popcorn and peanuts to fine dining full-service restaurants. There may also be catering in select box suites. Usually, the food at an arena copies an area's most popular and unique items.
10. **Cruise Ships** pride themselves on offering an excellent dining experience. Over the years, dining on cruise ships has evolved to allow for more choices and flexibility with some venues open 24 hours, and others with more than 20 dining options, ranging from casual snacks to fine cuisine.