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Consumer Foodservice in the US

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Consumer Foodservice in the US

EXECUTIVE SUMMARY

Macroeconomic and policy disruptions reshape consumer foodservice

KEY DATA FINDINGS

INDUSTRY PERFORMANCE

Navigating operational volatility and the premiumisation of value

Brands adapt to capture value-conscious diners demanding convenience

Loyalty programmes and experiences connect with customers in a price-sensitive world

WHAT'S NEXT?

Challenges abound, but US consumers still love to eat

The legacy of GLP-1

Sustainability and health policy shifts

COMPETITIVE LANDSCAPE

The golden arches remain important in consumer foodservice in the US

Dutch Bros continues to see the winds blow in its favour

K-Brands and beyond continue to push experiential dining in the US market

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Innovation and polarisation in cafés/bars

INDUSTRY PERFORMANCE

Cafés/bars sees growth, with juice/smoothie bars leading the way

Chained juice/smoothie bars benefits from a visible focus on whole foods and health
An on-the-go society continues to demand customisation and speed from its caffeine

WHAT'S NEXT?

Growth to abound for beverages, an area with endless customisation and potential
Fulfilment in cafés/bars set to head in opposite directions over the forecast period
Will Luckin Coffee disrupt cafés/bars?

COMPETITIVE LANDSCAPE

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INDUSTRY PERFORMANCE

Full-service restaurants coasts along on increased menu prices
Changes within the most dynamic format – other full-service restaurants
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WHAT'S NEXT?

Full-service restaurants shifts to consumer retention
Diners taken aback by delivery fees take away their patronage, opting for takeaway
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Value and convenience drive growth amid pricing pressures

INDUSTRY PERFORMANCE

Limited-service growth continues apace as convenience and value take centre stage

Chained Middle Eastern limited-service restaurants sees the strongest growth

Fulfilment in the US continues to favour convenience

WHAT'S NEXT?

Limited-service restaurants set to see significant growth over the forecast period

Fulfilment channels to become less discrete as formats evolve

Innovation will stand out as an important tool to combat price and labour disruptions

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Self-service cafeterias: Navigating economic volatility through scale and value

INDUSTRY PERFORMANCE

Consumers are looking for safety, value and convenience

Self-service cafeterias are particularly susceptible to spoilage and ingredient shifts – chained operators outperform

Self-service cafeterias push the bounds of value offerings

WHAT'S NEXT?

Self-service cafeterias reliant on core consumer groups to extend their lifespan

Self-service cafeterias reliant on adjacency and smart placement more than others

Sustainability practices will remain important even as messaging dies off

COMPETITIVE LANDSCAPE

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Agility and authenticity: Independent operators drive growth in street stalls/kiosks

INDUSTRY PERFORMANCE

Street stalls/kiosks able to navigate a dual-demand macroenvironment

Chained street stalls/kiosks suffers from challenges and independents dominates

Street stalls/kiosks offer convenience that static competitors cannot replicate

WHAT'S NEXT?

Regulatory headwinds the biggest roadblock to higher rates of expansion
Wonder aims to position Grubhub as a niche provider for transient dining concepts
Electrification and automation for street stalls/kiosks

COMPETITIVE LANDSCAPE

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2025 DEVELOPMENTS

Digital integration and growth in leisure locations: Leading the next wave of foodservice growth

INDUSTRY PERFORMANCE

Leisure locations continue to see food and beverage sales grow rapidly
Standalone remains dominant, but other locations present a challenge
"Eat-in delivery" model is increasingly evident

WHAT'S NEXT?

Eating on-the-go continues to improve, but so too does the level of bifurcation
Standalone foodservice will continue to lean into the value of convenience
US consumer foodservice faces an uncertain future, but one with increased variety
International cuisine will remain in focus between immigration policy and the forthcoming World Cup

COMPETITIVE LANDSCAPE

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