

# A global overview of challenges, trends, and opportunities in foodservice

(...and what this means for UK operators and manufacturers...)



# About me



## Editorial Director of 1473 Media and FCSI's *Foodservice Consultant* magazine

Not an 'expert'! Or a foodservice consultant!

But a journalist who charts and analyses trends (and knows a lot of experts).





# About 1473 Media



14  
73  
MEDIA



# The foodservice industry: an overview

The challenges, globally







# **A volatile global economy**





# Inflation continues to bite, globally

In a nutshell, global inflation can be described as “moderation, but sticky”

**4.0-4.2%**







# Regional divergence:

Inflation levels vary considerably by region





# What is driving this?

Food and energy prices

Strong labour markets/wage demands

Supply-side issues, and barriers to trade





**How are  
equipment  
manufacturers  
feeling the  
effects of the  
tariffs?**





# How different markets are responding, globally





# The US market: the restaurant sector

**\$1.5tn**

*Source: NRA's State of the Restaurant Industry 2025*





# The US market: the restaurant sector

Key trends



Experience over price



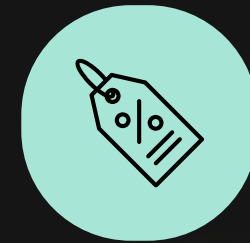


# The US market: the restaurant sector

Key trends



Experience over price



Value remains top of mind

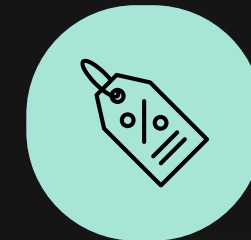


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Boosting on-premises traffic is a priority

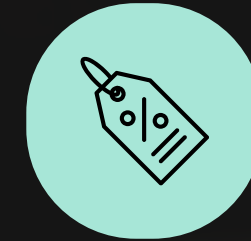


# The US market: the restaurant sector

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Boosting on-premises traffic is a priority



US consumers still *love* restaurants

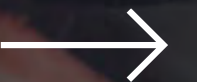


A person in a blue uniform is handing a brown paper bag with a red stripe to a customer in a car. The background is a blurred outdoor setting with a building and a car.

# The US market: the off-premises dining sector

(Delivery, food to go, takeout and drive-thru)

Key trends

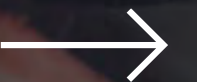




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# The US market: the off-premises dining sector

More than **6 in 10** of younger adults say they use takeout, drive-thru and delivery more often now than they did a year ago

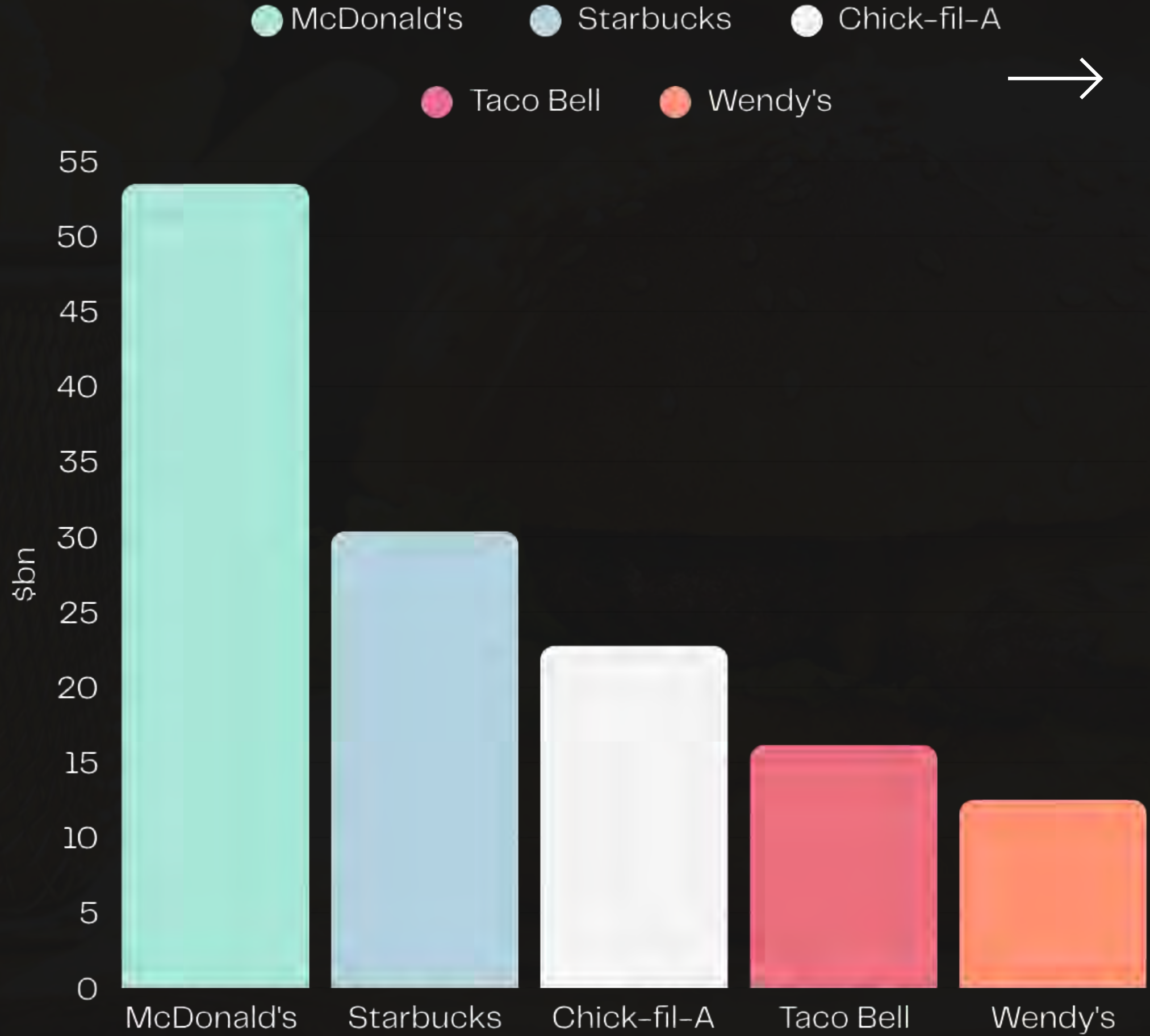




# The US market: the QSR sector

The top 50 fast-food chains in the US ranked by systemwide sales:  
The Top Five

(Systemwide sales, year-end 2024, US)



Source: QSR Magazine's The QSR 50



# The US market: QSR trends

So, what are these brands doing differently,  
to maintain market share?







# The US market: QSR trends

How the top three are making themselves future fit



## McDonald's

Focused on digital transformation, footprint expansion, and menu innovation around chicken and value offerings.



## Starbucks

The chain's 'Back to Starbucks' plan aims to get the brand back on track and building "a better, stronger, and more resilient Starbucks".



## Chick-fil-A

Focusing on a core strategy that combines a high-quality, simple menu with exceptional customer service, and a strong loyalty program.





# The US market: QSR trends

## McDonald's

### **Technology & digital integration**

- AI and cloud technology
- "Edge" platform
- Ready on arrival" technology
- Self-ordering kiosks and delivery
- Strategic partnerships

### **Sustainability & operations**

- Restaurant expansion, marking its fastest period of growth
- Supply chain improvements
- Meeting environmental commitments





# The US market: QSR trends

## Starbucks

### **Store redesigns; global expansion**

New designs to bring the mojo back  
First “espresso bar” format store:  
Doubling Starbucks’s global footprint  
and expanding the brand to more than  
100,000 locations worldwide

### **Tech to enhance customer experience**

Reliance on the mobile app for pre-  
ordering, mobile payments and a  
personalized rewards program  
Using AI and data analytics to create  
personalized offers and  
recommendations





# The US market: QSR trends

## Chick-fil-A

### **Technology to put the customer first**

- Testing first 24-hr vending machines
- Testing drone delivery in the US
- Chick-fil-A One app for personalized rewards for customers
- Geofencing technology used to send location-based promotions

### **Data-driven operations**

- AI and machine learning used for data analysis
- An advanced cloud and Edge computing infrastructure less and efficient experience from order to fulfillment

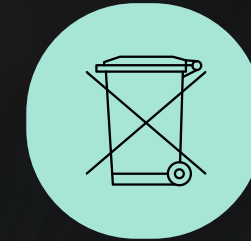


# AI's role in foodservice equipment

AI is optimizing equipment by enhancing consistency, reducing waste, and improving efficiency through features such as predictive maintenance and automated inventory management.



Improving food quality and safety



Reducing waste and optimising inventory



Boosting efficiency and sustainability



Enhancing the customer experience







# The US market: fine dining sector trends

Feeding a stronger appetite for luxury dining experiences







# The US market: fine dining sector trends

Combining innovation with sustainability and a curated experience





The US market:  
fine dining sector trends

# 1. Experiential and multi- sensory dining







The US market:  
fine dining sector trends

## 2. Tableside dining







The US market:  
fine dining sector trends

# 3. Hyper-personalization







The US market:  
fine dining sector trends

# 4. Ethical sourcing





The US market:  
fine dining sector trends

# 5. Health-conscious offerings





# Europe: Key foodservice trends





# Factors shaping European foodservice

Top five key learnings



Functional (and health-promoting) foods  
on the rise





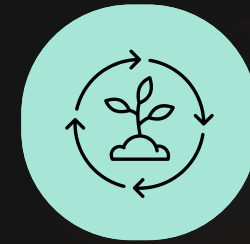
# Factors shaping European foodservice

Top five key learnings

FEA INDUSTRY CONFERENCE | 2025



Functional (and health-promoting) foods  
on the rise



Sustainability now an operational  
necessity



SOURCE: EUROPEAN FOODSERVICE SUMMIT 2025, ANDY ZYNGA



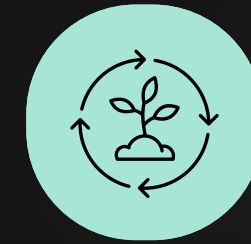
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Transparency and trust influence  
choices



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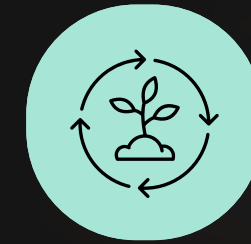


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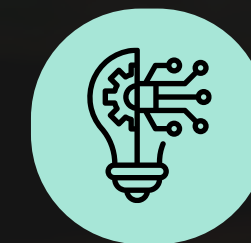
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Gen Z drives customization and tech



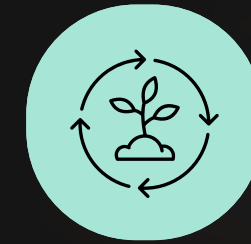


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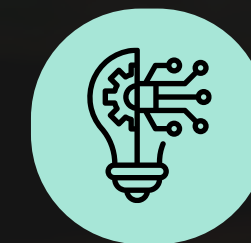
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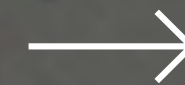


Gen Z drives customization and tech



Regional shifts and culinary  
hybridization





# How is the UK market faring?

(...and what does this mean for equipment manufacturers?)





# The state of play: the good

The UK's Top 100 restaurant groups' profits jumped 18% over the past year to £365m as of 30 June 2025, up from £308m during the same period in 2023/2024 (UHY Hacker Young)

UK's casual dining sector is now showing signs of renewed growth after significant closures

Greggs leads the fast casual segment

Wingstop: the fastest-growing restaurant group





# The state of play: the bad

Major brands continue to struggle  
Pizza Hut closed half its UK restaurants  
after being bought out of administration for  
the second time this year

Leon has not recorded a pre-tax profit since  
2015. Can its original owner bring back its  
mojo?  
The UK hotel market has suffered declines in  
profitability for the second consecutive  
quarter





# The state of play: the ugly

UK pub sector in long-term decline, leading to high closure rates, with over one pub a day closing permanently in first half of 2025  
The Restaurant Group closed 125 sites

Over the summer, casual and fast-food restaurants saw a 6% drop in customers compared to last summer  
Chiquito went into administration  
Michelin-starred closures: Locanda Locatelli, Store, and Purnell's



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# Who is bucking the trend?





A man wearing a black bandana and a black t-shirt is pouring a thick, orange-brown sauce from a small glass bottle into a large metal bowl. The bowl contains two pieces of golden-brown fried chicken. The man has a focused expression on his face. The background is a solid blue color with large, stylized, semi-transparent text that reads "HOT CHILI MEN" and "FAMOUS".

# Sides







# Exert your influence(rs)

## Sides

Build for the market conditions in order to be more resilient

Have a clear, authentic, and unique proposition

It's not about reach, but relationships

Simplify and streamline menus (and your kitchens)

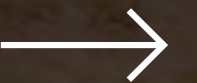
Execute consistently and at speed

Be bold, be fun, connect with your customers (and engage with them)

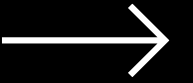


# The Beaumont Mayfair

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# Embrace your roots – and USP

## The Beaumont Mayfair

Focus on giving your customer an authentic experience

Know your audience. Play to your strengths. Understand the power of 'local'

Have fun, be interactive, bring the theatre

Recruit well. Great teams win the prizes

Go big or go home



# In conclusion...

## Key takeaways:

The latest global foodservice trends emphasise technology integration, sustainability, and operational flexibility. Equipment manufacturers must therefore continue to develop solutions that address operational challenges such as labour shortages, high costs, and sustainability demands through automation, energy efficiency, tech integration, and modular designs.

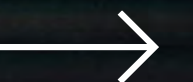




# In conclusion...

## The future is...

AI, automation and robotics  
Smart, connected kitchens and IoT  
integration  
Energy efficiency and sustainability  
Modularity and space efficiency  
Enhanced food safety and hygiene  
Support for off-premise dining  
Adaptability to menu trends

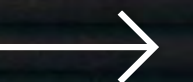




# In conclusion...

## But also....

Listen to your customers. And  
engage with them  
Create experiences, not  
transactions. Don't be afraid to bring  
the theatre  
Stand out – for the right reasons.  
Find your USP  
Play to your strengths. Don't be  
afraid to scale back, go back to  
basics – or go back to your roots  
Be authentic, always





# Thank you

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