



GSRANALYTIX

FOOD & CULINARY MAGAZINE

ISSUE 26/05

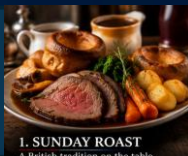
FOOD • BEVERAGE • GASTRONOMY

UNITED KINGDOM



WORLD OF CULINARY

SUNDAY ROAST The heart of the
British table



1. SUNDAY ROAST
A British tradition on the table

FISH & CHIPS Britain's
timeless seaside
classic



2. FISH & CHIPS
Britain's seaside classic

FULL ENGLISH BREAKFAST
A bold start to the day



3. FULL ENGLISH BREAKFAST
A bold start to the day

HAGGIS
SCOTLAND'S ICONIC DISH



8. HAGGIS
Scotland's iconic dish

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TRENDS 2026: THE AGE OF
"VALUE"

* FOOD & BEVERAGE M&A
ACTIVITY GAINS
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GLOBAL RESTAURANT
CHAINS BRING BACK
THE "HUMAN TOUCH"

**PLUS OTHER GLOBAL
SECTORAL NEWS**



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IMPRINT

Published by **GSR ANALYTIX**

Founder & Managing Editor: **Gürkan Sever**

Editorial & Research: **GSR ANALYTIX**

Tourism Editorial Team

Art Direction & Design: **GSR ANALYTIX**

Creative Studio

Digital Publishing: **GSR ANALYTIX Media**

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Editorial sources include international news agencies, official institutions and company releases..



SUNDAY ROAST

1. SUNDAY ROAST

A British tradition on the table

SUNDAY ROAST The heart of the British table More than a meal, the Sunday Roast is one of Britain's most enduring culinary traditions—a weekly ritual built around family, conversation and the pleasure of sharing a generous table. At its heart is beautifully roasted meat — traditionally beef, chicken, lamb or pork — surrounded by crisp golden potatoes, seasonal vegetables, rich gravy and the unmistakable Yorkshire pudding. Recipes vary from home to home and region to region, but the spirit remains the same:

Sunday is the day to slow down, gather together and turn lunch into an occasion. For generations, the roast has connected British families across the table. Today it remains equally at home in a country pub, a sophisticated London restaurant or a family kitchen. Classic, comforting and unmistakably British, the Sunday Roast is not simply food—it is part of the rhythm of British life.

FAMOUS VOICES ON THE SUNDAY ROAST

GORDON RAMSAY For Ramsay, Sunday roasting is about English tradition, generous food and bringing everyone together around the table.

JAMIE OLIVER Oliver sees the Sunday Roast as the perfect excuse to slow down, reconnect with family and friends, and enjoy great sharing food.

MARY BERRY Berry regards Sunday lunch as one of Britain's great traditions — built around familiar classics, family favourites and food designed to



FISH & CHIPS

2. FISH & CHIPS

Britain's seaside classic

FISH & CHIPS The taste of the British coast **GORDON RAMSAY** Headline 2
More than a take away favourite, Fish & Chips is one of Britain's most recognisable culinary traditions—a simple combination that has become deeply woven into everyday British life. At its heart is fresh white fish—traditionally cod or haddock—coated in a light, crisp batter and served with thick-cut golden chips. Mushy peas, tartare sauce, malt vinegar and a wedge of lemon often complete the plate. From seaside towns to neighbourhood “chippies”, every region has its own interpretation, but the essentials remain unchanged: fresh fish, crisp batter and perfectly cooked potatoes.

For generations, Fish & Chips has been enjoyed by families, workers and holiday makers alike. Wrapped in paper by the seaside or served on a plate in a modern restaurant, it represents something distinctly British—uncomplicated, comforting and instantly familiar. Few dishes capture the character of Britain's coastal food culture quite so perfectly.

FAMOUS VOICES ON FISH & CHIPS

GORDON RAMSAY For Ramsay, great Fish & Chips is all about quality fish, a beautifully crisp batter and getting the simple details absolutely right.

JAMIE OLIVER Oliver celebrates Fish & Chips as classic British comfort food—familiar, generous and at its best when prepared with fresh ingredients



FULL ENGLISH BREAKFAST

3. FULL ENGLISH BREAKFAST

A bold start to the day

FULL ENGLISH BREAKFAST A morning tradition with British character. More than simply the first meal of the day, the Full English Breakfast is one of Britain's most recognisable culinary traditions — generous, comforting and built for a slow morning around the table. A classic plate usually brings together eggs, bacon, sausages, grilled tomatoes, mushrooms, baked beans and toast, often joined by black pudding or fried bread.

Every household, café and region has its own variation, but the idea remains the same: a hearty collection of familiar ingredients served together as one satisfying meal. Once associated with long working days and leisurely weekend mornings, the Full English has become part of Britain's culinary identity. From tradition at cafés and countryside inns to modern hotels and brunch restaurants, it continues to evolve while keeping its unmistakable character. Rich, filling and deeply nostalgic, it is a breakfast that feels as much like a ritual as a meal.

FAMOUS VOICES ON THE FULL ENGLISH

GORDON RAMSAY For Ramsay, a great English breakfast is about cooking ingredients properly — crisp bacon, well-prepared eggs and strong flavours working together on one plate.

JAMIE OLIVER Oliver approaches the Full English as classic British comfort food — generous, familiar and perfect for bringing people together over a relaxed breakfast. 4



HAGGIS

8. HAGGIS

Scotland's iconic dish

HAGGIS The bold taste of Scottish tradition Morethana traditional dish, Haggis is one of Scotland'smost distinctiveculinary symbols— a recipeshapedby history, resourcefulness and a deepsense of national identity. Traditionally preparedwith finely minced sheep's offal, oats, onions, suet and a warming blend of spices, haggis is slowly cookeduntil rich, savoury and deeplyaromatic. It is mostfamously servedwith “neeps and tatties”— mashed turnipsandpotatoes—creatinga heartycombinationthathas remaineda Scottishfavouritefor generations. Haggis holdsa special place at theScottishtable, particularlyduring BurnsNight, when it becomesthecentrepiece of celebrationshonouring poet Robert Burns. Today, chefs continueto reinterprettheclassic in everythingfrom elegant restaurantdishes to modern streetfood. Robust, comforting and unmistakablyScottish, haggis is more than food—it is a tasteof Scotland'sheritage.

FAMOUS VOICES ON HAGGIS

GORDON RAMSAY For Ramsay, haggis represents thehonest, robust character of Scottish cooking — traditional ingredients transformed through careful preparation and bold flavour.

JAMIE OLIVER Oliver treats haggis as a great example of traditional British food culture — hearty, full of character and especially at home alongside classic Scottish accompaniments

TASTE OF
BRITAIN

TRADITIONAL DISHES, TIMELESS FLAVOURS

*More than food —
it's a part of the story.*PEOPLE
CULTURE
TRADITION
GREAT TASTEPLOUGHMAN'S
LUNCH

A SIMPLE BRITISH CLASSIC



A traditional cold meal of cheese, crusty bread, pickles and chutney, the Ploughman's Lunch has its roots in rural England. Simple, hearty and full of flavour, it remains a favourite in pubs and countryside inns.

CHEDDAR CHEESE
CRUSTY BREAD
PICKLES & CHUTNEY
APPLERURAL ENGLAND
ON A PLATETOAD
IN THE HOLE

A COMFORTING CLASSIC



Succulent sausages baked in a rich Yorkshire pudding batter, Toad in the Hole is a much-loved British comfort dish. Crispy on the outside, soft and savoury within, it's best enjoyed with onion gravy and seasonal vegetables.

QUALITY SAUSAGES
YORKSHIRE PUDDING BATTER
RICH ONION GRAVY
SEASONAL VEGA TRUE BRITISH
COMFORT FOOD

STILTON

A CHEESE WITH CHARACTER



Rich, bold and unmistakably British, Stilton is one of the UK's most famous cheeses. With its distinctive blue veins and creamy texture, it has been enjoyed for centuries and pairs perfectly with fruits, nuts and a glass of port.

BOLD FLAVOUR
CREAMY TEXTURE
PERFECT WITH FRUITS
BEST WITH PORTA BRITISH ICON
SINCE THE 18TH CENTURYCORONATION
CHICKEN

A ROYAL CREATION



Created for the coronation of Queen Elizabeth II in 1953, Coronation Chicken is a delicious blend of cooked chicken, mayonnaise, curry spices and dried fruits. A uniquely British dish with a royal history, it's still popular today in sandwiches and salads.

TENDER CHICKEN
CURRY SPICES

SCOTCH EGG

A BRITISH FAVOURITE



A perfectly boiled egg wrapped in seasoned sausage meat, coated in breadcrumbs and fried until golden, the Scotch Egg is a true British classic. Originally a picnic food, it's now enjoyed across the UK in pubs, cafés and delicatessens.

BOILED EGG
SEASONED SAUSAGE MEAT

ECCLES CAKE

A SWEET BRITISH TRADITION



A small, round pastry filled with spiced currants, Eccles Cake has been a British favourite since the 18th century. With its flaky crust and sweet, rich filling, it's the perfect accompaniment to a cup of tea.

FLAKY PASTRY
SPICED CURRANTS

BRITISH
FLAVOURS

MORE THAN FOOD — A RICHER STORY

TRADITION
PEOPLE
CULTURE
HERITAGE
GREAT TASTETaste
the
Story

BEEF WELLINGTON

A ROYAL CLASSIC



Tender beef fillet coated with mushroom duxelles, wrapped in puff pastry and baked to golden perfection. Beef Wellington is a dish of elegance and tradition, often associated with British fine dining.

- BEEF FILLET
- MUSHROOM DUXELLES
- GOLDEN PUFF PASTRY
- A FINE DINING CLASSIC

 A DISH FIT
FOR ROYALTY

BUBBLE AND SQUEAK

A TRADITIONAL FAVOURITE



Originally created to use up leftovers, Bubble and Squeak is made from fried potatoes and vegetables, traditionally from a Sunday roast. Simple, tasty and sustainable, it's a true British classic.

- POTATOES
- LEFTOVER VEGETABLES
- PAN FRIED
- A TASTY SECOND LIFE

 HUMBLE ORIGINS,
LASTING APPEAL

PIE AND MASH

A LONDON LEGEND



A traditional Cockney dish of minced meat pie served with creamy mashed potatoes and parsley sauce (liquor). Pie and Mash has been a London favourite for generations, loved for its hearty simplicity and rich flavour.

- MINCED MEAT PIE
- CREAMY MASH
- PARSLEY SAUCE (LIQUOR)
- A TRUE LONDON CLASSIC

 PART OF LONDON'S
CULINARY HERITAGE

SAUSAGE ROLL

A BRITISH ICON



Crisp, flaky pastry filled with seasoned sausage meat, the sausage roll is one of the UK's most beloved snacks. From bakeries to picnics, it's a simple pleasure that never goes out of style.

- SEASONED SAUSAGE MEAT
- FLAKY PASTRY
- PERFECT ON THE GO
- A NATIONWIDE FAVOURITE

 A SMALL BITE
WITH A BIG FOLLOWING

CRUMPETS

SOFT, SPONGY, TRADITIONAL



With their signature holes and soft texture, crumpets are a uniquely British treat. Best enjoyed warm with butter, they are a comforting classic, perfect for breakfast, tea time or a cosy evening at home.

- SOFT & SPONGY TEXTURE
- BEST WITH BUTTER
- PERFECT FOR TEA TIME
- A BRITISH COMFORT CLASSIC

 A LITTLE TASTE
OF EVERYDAY BRITAIN

TRIFLE

A SWEET CELEBRATION



Layers of sponge, fruit, custard and cream make trifle one of Britain's most enduring desserts. Colourful, indulgent and full of flavour, it's a favourite at family gatherings and festive tables.

- SPONGE CAKE
- FRUIT & CUSTARD
- CREAMY TOPPING
- A FESTIVE FAVOURITE

 A DESSERT
FOR SPECIAL MOMENTS



UK GASTRONOMY & FOOD: LOCAL SECTORAL SNAPSHOT / BY THE NUMBERS

Market Size

UK Foodservice Market (2026): **\$110.97 billion**, growing at 5.88% CAGR to reach \$147.63bn by 2031

UK Full-Service Restaurants: **\$35.78 billion** in 2026, projected to hit \$49.85bn by 2031 (6.85% CAGR)

UK Takeaway & Fast-Food Restaurants: **£24.0 billion** in 2026, though the segment has contracted at a -1.1% CAGR since 2021 amid cost-of-living pressure

UK Food-to-Go Market: **£24.9 billion** forecast for 2026, up +3.4% year-on-year — outperforming the wider eating-out sector

Consumer Spend

Average spend per food-to-go visit: **£12.98**, up 8.5% year-on-year, driven by premiumisation and add-ons rather than higher footfall

Top 10 food-to-go brands control **33.3%** of total market turnover

Structure & Channels

Quick-service restaurants hold **33.78%** of the UK foodservice market by type; cloud kitchens are the fastest-growing format at 12.10% CAGR through 2031

Dine-in still dominates service type at **54.62%** share, but delivery is growing at 7.11% CAGR as pandemic-era ordering habits persist

Independent outlets hold **56.72%** of the market, growing at 6.35% CAGR

167,000 retail outlets sell food across the UK; supermarkets hold **94.6%** of grocery market share

Tesco remains the largest grocery retailer with a **27.2%** market share; private-label products account for **54%** of grocery sales value

Supply Chain

85% of UK food supply chain companies are based in England

UK cold-chain warehouse capacity stands at **30 million cubic metres**

Average EU-to-UK food transit time: **24–48 hours**

Sources: Mordor Intelligence, IBISWorld, Lumina Intelligence, WifiTalents

**UK GASTRONOMY: LOCAL SECTOR OUTLOOK & OPPORTUNITIES**

TREND The UK restaurant sector enters the second half of 2026 in a state of selective contraction. The market was valued at £18.5 billion in 2025, down 2.0% year-on-year, driven by rising operating costs, outlet closures and shifting consumer behaviour. The picture is uneven, however: premium and experience-led formats remain resilient, and average transaction value rose 2.4% in early 2026 even as visit frequency held flat. Diners are eating out less often but spending more per visit—value is being sought through meal deals and set menus (used by 54% and 43% of diners respectively in 2025) rather than by avoiding restaurants altogether. The clearest growth pocket is younger, multi-day part-diners moving through kiosk, food hall and travel-hub formats.

RISK Cost pressure remains the defining structural risk. UK food inflation is forecast to reach at least 9% by end 2026 (Food and Drink Federation), compounding a National Living Wage rise to £12.71 in April 2026 and last year's employer National Insurance increase. For operators running on 3–6% margins, these two cost lines moving together at once is described as a structural challenge rather than a temporary squeeze. Roughly 48% of hospitality businesses report unfilled vacancies, reflecting a deep and persistent labour shortage. Smaller, independent operators—most exposed to rent and energy volatility—are absorbing the bulk of closures.

OPPORTUNITY Despite the pressure, research from Toast/Expert Market found a clear majority of UK restaurant owners still expect some form of growth in 2026. The operators pulling ahead treat efficiency as strategy—deploying staff against real-time demand forecasts rather than fixed rotas. Structural opportunity clusters in three areas: continued premiumisation that justifies higher spend per visit; expansion into new dayparts and non-traditional locations (travel hubs, food halls) to capture younger, frequency-driven diners; and growing consumer preference for sustainable, locally-sourced products, which is beginning to shape investment priorities and pricing strategy across the sector. Sources: Lumina Intelligence, BDO, Tenzo, Food and Drink Federation, Toast/Expert Market, Minte



FEATURED DISH: SUNDAY ROAST

A BRITISH CLASSIC OF ROASTED MEAT, YORKSHIRE PUDDING AND RICH GRAVY



The Sunday Roast is more than just a meal; it's a cherished British tradition. Typically featuring roasted beef, lamb, chicken or pork, served with golden roast potatoes, seasonal vegetables, Yorkshire pudding and rich gravy, it brings families and friends together around the table. Rooted in centuries of home cooking, it remains a symbol of comfort, hospitality and British identity.

KEY ELEMENTS

- Quality meat
- Roast potatoes
- Yorkshire pudding
- Seasonal vegetables
- Rich gravy
- Herbs & seasoning
- Traditional stuffing
- Horseradish or mint sauce

CLASSIC PAIRINGS



Red wine
(e.g. Cabernet,
Merlot)



British ale
or stout



A cup of
English tea
afterwards

WHY THE WORLD LOVES IT



BOLD

A hearty and satisfying meal with rich flavours.



BALANCED

Perfect harmony of meat, vegetables and gravy.



COMFORT

A dish that feels like home, no matter where you are.



ADAPTABLE

Different meats, local ingredients and modern twists keep it relevant today.



Chef's tip: Let the meat rest before slicing and always use the juices to make a rich, flavourful gravy.





FOOD AND CULINARY HOTSPOTS — UNITED KINGDOM

- 1) **Bantof — London**
Modern European & creative small plates.
- 2) **The Ritz Restaurant — London**
Classic French fine dining.
- 3) **Heddon Street Kitchen — London**
Modern British comfort food & grill.
- 4) **UNALOME by Graeme Cheevers — Glasgow**
Modern Scottish with French techniques.
- 5) **The Wolseley — London**
European brasserie classics.
- 6) **Murano — London**
Modern Italian with British influence.
- 7) **The Old Stamp House — Ambleside (Lake District)**
Contemporary Cumbrian cuisine.
- 8) **Sussex British Bistro — London**
Seasonal British farm-to-table dishes.
- 9) **Dishoom Covent Garden — London**
Bombay-inspired Indian comfort food.
- 10) **Sketch Lecture Room & Library — London**
Contemporary French haute cuisine.
- 11) **Core by Clare Smyth — London**
Modern British fine dining.
- 12) **The Ledbury — London**
Innovative modern British tasting menus.
- 13) **Restaurant Gordon Ramsay — London**
Classic French fine dining.
- 14) **The Kitchen — Edinburgh** Scottish seasonal cuisine, "nature-to-plate".
- 15) **L'Enclume — Cartmel** Farm-driven modern British tasting menus.
- 16) **The Fat Duck — Bray** Experimental, multisensory gastronomy.
- 17) **The Clove Club — London** Modern British with Nordic influence.
- 18) **The Hand & Flowers — Marlow**
Elevated gastropub British dishes.
- 19) **Brat — London**
Wood-fired Basque-inspired cuisine.
- 20) **The Palomar — London**
Modern Jerusalem & Levantine fusion.



GLOBAL GASTRONOMY TRENDS 2026:

THE AGE OF "VALUE "

As global economic uncertainty deepens in 2026, "value" has become the defining word in gastronomy. According to Michelin Guide inspectors, the culinary world is no longer chasing a single dominant direction — cuisines across continents are evolving along quiet, parallel paths, moving away from flashy revolutions and back toward fundamentals: ingredients, technique, time, and genuine hospitality. Open-flame cooking has become a standard technique in top-tier kitchens worldwide. Michelin inspectors note this approach spanning Scandinavia, Latin America and Asia, with fire lending dishes smoky depth and natural structure without unnecessary intervention. Fermentation and slow-ageing processes are also among the year's standout techniques, with time treated as an active flavor tool rather than a limitation.

According to the New York Times, economic pressure is pushing consumers back toward traditional preparations and minimally processed ingredients — homemade bread, fermented vegetables and preserves are having a moment. Other defining trends of the year include single-item "premium" menus built around one perfect sandwich or pastry, diaspora-driven baked goods with global flavor stories, and overlooked cuts of meat being reimagined as centerpiece dishes.



FOOD & BEVERAGE

M&A ACTIVITY GAINS MOMENTUM IN 2026

Mergers and acquisitions in the global food and beverage sector regained pace in 2026 after a cautious 2024. Analysts point to three macro forces driving the recovery: private equity dry powder targeting recession-resilient consumer staples, strategic consolidation among CPG conglomerates defending shelf space, and first-generation founder retirements across regional bakeries, specialty food brands and food-service distributors.

Major players including Kraft Heinz, General Mills, Conagra, Mondelez, Hershey and Unilever maintain active corporate development teams hunting for tuck-in brands in the \$50–500 million revenue range — the logic being that if a strategic buyer doesn't own a brand in a growing category, a competitor eventually will.

On the retail side, consolidation continues among regional grocers seeking scale, with smaller chains entering new states through targeted store acquisitions. Industry advisors note that 2026 deals are increasingly surgical rather than volume-driven, with buyers favoring premium, health-oriented brands and under-utilized operational assets over broad roll-ups.

Source: The Food Institute, CT Acquisitions





GLOBAL RESTAURANT CHAINS BRING BACK THE "HUMAN TOUCH"

After years of leaning into automation and self-service, major restaurant chains are recalibrating toward human interaction and food quality. Burger King is investing in improving its flagship Whopper as a core driver of this year's sales growth, while McDonald's is pursuing food-quality upgrades as part of its broader "NEXT" strategy. Wendy's rolled out upgraded chicken sandwiches earlier in the year as part of the same industry-wide shift.

Growth capital is also flowing into multi-brand restaurant groups. Authentic Restaurant Brands, owner of Pollo Tropical and P.J. Whelihan's, secured a \$325 million investment from London-based asset manager Trimontium to accelerate expansion and acquire additional regional concepts. The group currently operates 225 locations generating over \$1 billion in combined annual revenue, with four consecutive years of positive same-store sales growth; Pollo Tropical alone contributes 122 locations and more than \$327 million in annual sales. The company has also signaled a possible IPO within the next three to five years.

Source: Restaurant Dive, American Recruiters



WORLD GASTRONOMY EVENTS

SPOTLIGHT CROSS-CONTINENTAL COLLABORATION

International culinary festivals in 2026 are increasingly built around cross-continental chef collaborations rather than single-region showcases.

The World Gourmet Festival returns to Bangkok's Anantara Siam Hotel this month under the theme "The World of Flavours," bringing together acclaimed chefs from Latin America, France and the United States.

Confirmed names include Álvaro Clavijo of El Chato in Bogotá — ranked the No. 1 restaurant in Latin America — known for showcasing native Colombian ingredients sourced with indigenous communities, and Julien Royer of Odette in Singapore, a three-Michelin-starred chef celebrated for reinterpreting refined French cuisine through an Asian lens.

Meanwhile, Manabí, Ecuador — designated World Region of Gastronomy 2026 — is hosting the second World Gastronomy Summit this September, convening global chefs, producers and cultural innovators to discuss the role of food producers in promoting ecological balance and sustainability.

Source: Breaking Travel News, IGCAT





GASTRONOMY & FOOD: GLOBAL SECTORAL SNAPSHOT / BY THE NUMBERS

Market Size

Global Food & Beverage Market (2026): **\$9.79 trillion**, up from \$9.44 trillion in 2025, growing at 3.75% CAGR to reach \$11.78 trillion by 2031

Global Food & Beverage Services (restaurants, bars, cafés, mobile food): **\$4.29 trillion** in 2026, projected to hit \$5.46 trillion by 2030 (6.2% CAGR)

Global Food & Beverage E-Commerce: **\$894.7 billion** in 2026, the fastest-growing segment at **17.2% CAGR**, forecast to reach \$1.69 trillion by 2030

Regional Distribution

Asia-Pacific leads global consumption with roughly **38–40%** market share, followed by North America (~32%) and Europe (~24%)

Asia-Pacific also drives the sharpest growth in processed food consumption (+63%) and retail modernization (+56%)

Market Structure

The top five global F&B players collectively hold close to **25%** market share; the broader top-tier group of major companies controls up to **68%** when measured across the wider industry

By end-user, **households** account for roughly **62%** of consumption; by product type, food holds about **65%** share versus beverages

Nestlé, The Coca-Cola Company, PepsiCo, Anheuser-Busch InBev and JBS rank among the sector's dominant players

Distribution Channels

Supermarkets remain the leading global channel at **59%** share, followed by convenience stores (22%), traditional markets (11%), and online sales (8%)

Emerging Momentum

Plant-based food adoption up **66%**, functional beverage demand up **54%**, clean-label product consumption up **47%** across global retail and foodservice channels

Investment priorities: **49%** of major players focused on product innovation, **41%** on sustainable packaging and supply-chain digitalization

Sources: Mordor Intelligence, The Business Research Company, Business Research Insights



GASTRONOMY: GLOBAL SECTOR OUTLOOK & OPPORTUNITIES

(Trend – Risk – Opportunity)

TREND

The global restaurant and foodservice industry enters the second half of 2026 navigating an unusual mix of pressure and appetite for change. Consumers worldwide remain enthusiastic about dining out but have grown sharply more selective about where they spend, forcing operators to compete on experience, speed, convenience and consistency all at once. Sustainability has shifted from background messaging to measurable operational practice — food waste, energy use and kitchen electrification are now treated as core business issues, not environmental talking points. Beverage programs are also emerging as standalone destinations in their own right. Structurally, the industry is moving toward smaller, more cost-efficient footprints: modular builds, delivery- and carry-out-first formats, and agile concepts (chicken-centric menus, beverage-first formats, niche comfort food) that cut overhead and speed up openings.





RISK

Cost and supply-chain volatility remain the dominant risk across major markets. Continued inflation, commodity price swings — particularly in beef and other proteins — and rising energy costs are sustaining pressure on already-thin margins, with unpredictable global supply chains pushing operators toward diversified suppliers and contract-based price protections. Labor remains an equally serious constraint: wage inflation, persistent shortages, and shifting immigration patterns continue to strain staffing across North America, Europe and parts of Asia, driving up turnover. Rising cost-of-living pressure is compounding this from the demand side, as guest counts and visit frequency are the primary revenue driver and convenience-format competitors intensify the squeeze. A fast-growing digital risk layer — cybersecurity and payment-security exposure — is rising in step with expanding online ordering and personalization.

OPPORTUNITY

Despite the pressure, the sector's underlying growth trajectory remains strong. The clearest opportunities cluster around three areas: experience and personalization, since guests now judge restaurants against every exceptional dining experience they've ever had, not just nearby competitors; format innovation, with cloud kitchens and delivery-only concepts lowering the capital barrier to new markets, and menu diversification — plant-based options, global-cuisine crossovers, and health-conscious reformulation — opening new customer segments; and targeted tax and policy relief in several major markets creating room for reinvestment even amid cost pressure. Operators treating sustainability, technology and workforce strategy as competitive advantages rather than compliance burdens are best positioned to outperform a sector that remains resilient even as it restructures.

Sources: RLI, Restaurant Business/Technomic, GBQ, Modern Restaurant Management, Patrice & Associates



SAVE THE AMAZON





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