Serving the Future: The 2025 Global Foodservice Outlook

EHL

December 2025

This executive report offers a comprehensive global outlook on the commercial foodservice sector in 2025. It explores the intersection of innovation, responsible business practices, and sustainable value creation, while addressing the digital and generative AI challenges reshaping the industry's future. Emphasizing strategic foresight and emerging pathways for sustainable transformation and long-term resilience, it represents the first publication to date that covers all commercial foodservice activities on a global level.

Read about our project

"Driving Sustainability and Innovation in the Foodservice Industry"

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1. Executive Summary

The global foodservice sector is entering a pivotal phase. Cost pressures, supply volatility, labor shortages and rising societal expectations around sustainability are reshaping the conditions under which restaurants, hotels and catering firms operate. At the same time, digital and generative artificial intelligence (AI) tools are advancing rapidly as they create new options for operational coordination, forecasting and even automation.

This executive report provides an accessible, forward-looking view of how innovation is unfolding across the sector. Drawing on the insights from our global survey (Figure 1) and grounded in ongoing research, it identifies broad patterns in innovation maturity, sustainability practices and digital/AI adoption. The study spans the full breadth of commercial foodservice activities—including hotel and casual restaurants, fine dining, catering, cafés and bars, fast-food and quick-service outlets, cafeterias and food courts, food trucks, and travel and leisure transport services—as illustrated in Figure 2. The analysis is concept-driven, designed to support strategic reflection among senior leaders and operational managers.

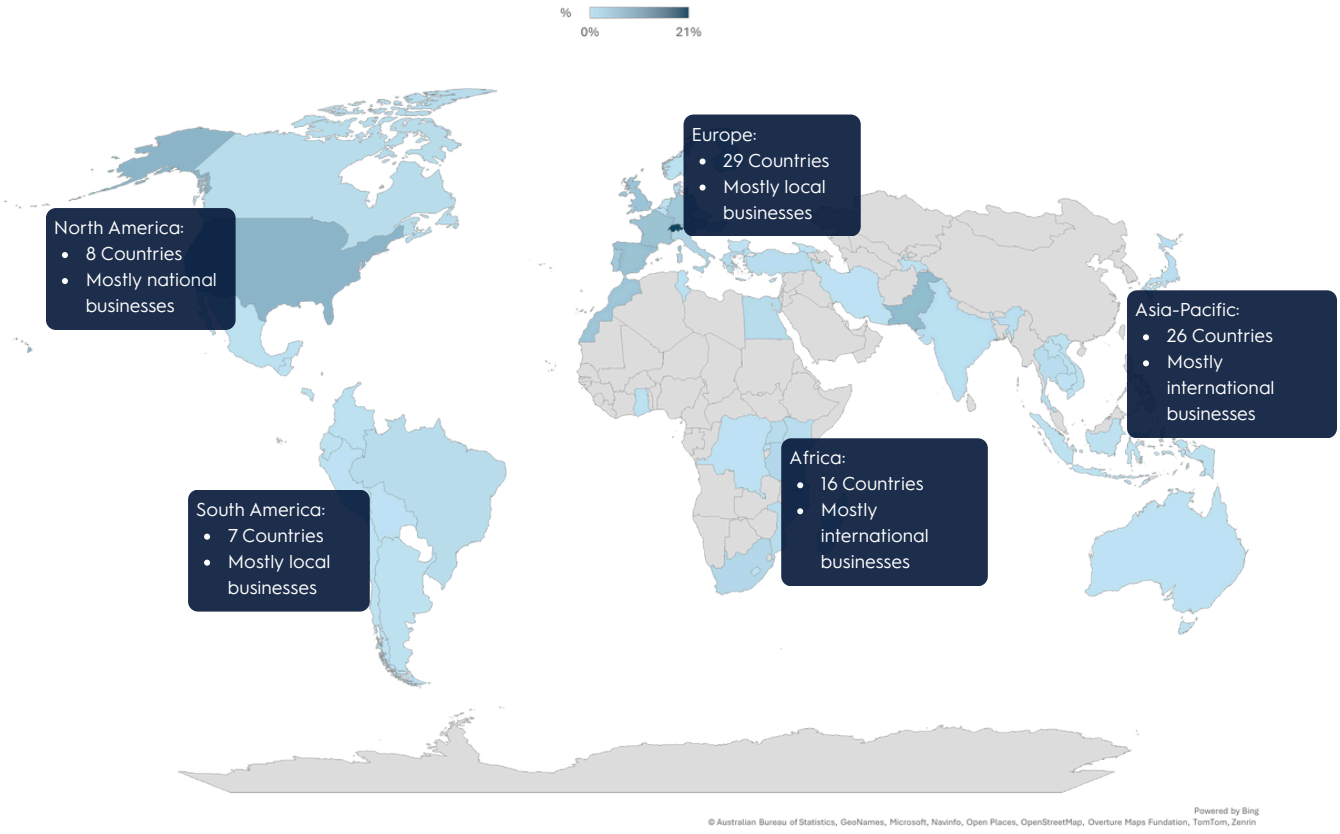

Figure 1: Competitive landscape of participating businesses (n=1'207)

Figure 2: Commercial foodservice providers surveyed

At a Glance

- Foodservice innovation is structurally weak, but evolving: Adaptation efforts are widespread but inconsistent, with significant variation between small and large firms.
- The industry follows a two-speed logic: Small firms are agile but lack scaling capacity, while larger firms can embed innovation in systems but move more slowly.
- Sustainability innovation is stronger where material flows are visible and actionable (waste, energy). Deeper commitments to sustainable supply chain and circular procurement are emerging but uneven.
- Digitalization is far ahead of AI, yet both remain under-integrated and inconsistent across the sector. Most operations use digital tools, but few have connected data flows that support advanced analytics or automation.
- The challenge in the next five years is integration: linking sustainability goals, digital operations and AI capabilities into coherent operating models.

"The industry is not short of ideas; it is short of integration. Firms that connect sustainability, data and digital operations will shape the next cycle."

Key Takeaway: Acting Under Uncertainty

Foodservice faces intersecting transitions— **innovation**, **socio-environmental**, **technological**. Operational innovation and business-model transformation is underway, but not yet at the scale or coherence required. The sector's long-term competitiveness will depend on its ability to integrate sustainability ambitions with digital systems and emerging AI tools into a shared operational logic.

The challenge is significant, but so is the opportunity. Firms that build capabilities around sustainability and technology will be positioned to thrive in a landscape defined by uncertainty and transformation.

Commercial foodservices have always been a margin-sensitive, fast-moving sector. Today, however, several structural pressures are hitting the industry simultaneously, creating a uniquely challenging operating landscape. Inflationary input costs, unstable supply chains and chronic labor shortages heighten the need for operational efficiency and adaptability.

At the same time, expectations around sustainability, circularity, regenerative practices and social impact continue to intensify. Customers and regulators increasingly expect more transparency and stronger, demonstrable commitments to both environmental and social responsibility.

Technology is also reshaping the operating landscape. Digital tools from distribution platforms to POS systems have become essential infrastructure. Meanwhile, AI promises to add new layers of prediction and automation, although its practical impact remains limited by data and capabilities.

The gauge charts below (Figure 3 to 5) should be read as directional indicators of strength: the darker arc represents the portion of respondents rating the attribute positively, while the lighter arc shows the remaining spread across negative responses. The further the needle extends toward the right side of the semicircle, the stronger the perceived presence of that trait. Put simply, when the dark arc covers more of the semicircle, agreement is stronger; when it covers less, agreement is weaker.

The results of Figure 3 indicate a broadly positive self-assessment of innovation across the foodservice sector. Exploratory, proactive, adaptive, creative, and bottom-up innovation dimensions all score strongly (approximately 4.1–4.5/5), suggesting a robust cultural and operational orientation toward innovation. In contrast, brand-driven innovation registers as the weakest dimension (3.97/5), pointing to a relative gap in how innovation is embedded at the strategic or branding level.

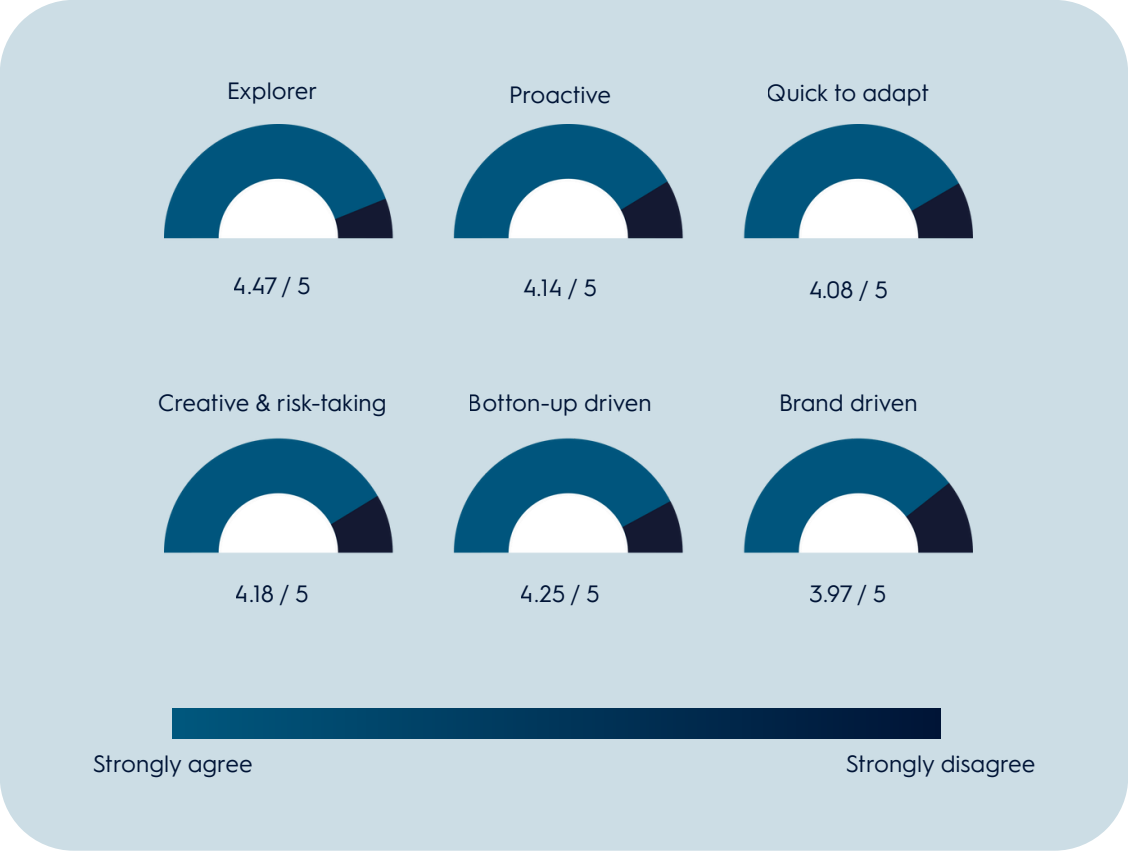

Figure 3: Is innovation in the DNA of the food industry?

Figure 4 indicates that the sector's sustainability commitments are advancing, but effectiveness remains uneven and generally moderate. Operational areas such as waste and packaging, appliance and resource use, and sourcing score relatively higher (around 3.3–3.5/5), indicating some maturity in day-to-day sustainability practices. In contrast, systemic and strategic dimensions, such as measurement and circularity, governance, and reporting show weaker performance (around 3.0/5), signalling gaps in the structures needed to drive deeper, long-term sustainability transitions.

Figure 4: Is the industry moving toward deeper sustainability commitments?

Figure 5 shows that digital and AI capabilities are emerging but not yet fully effective across the sector. While digital marketing and pricing show relatively stronger performance (3.32/5), core AI functions—such as AI-based service delivery (3.15/5), AI in back-office processes (3.04/5), and digital distribution channels (2.97/5)—lag behind. This suggests that technology adoption is occurring, but integration remains partial, with most companies still in early-stage or experimental phases rather than operating with digitally mature systems.

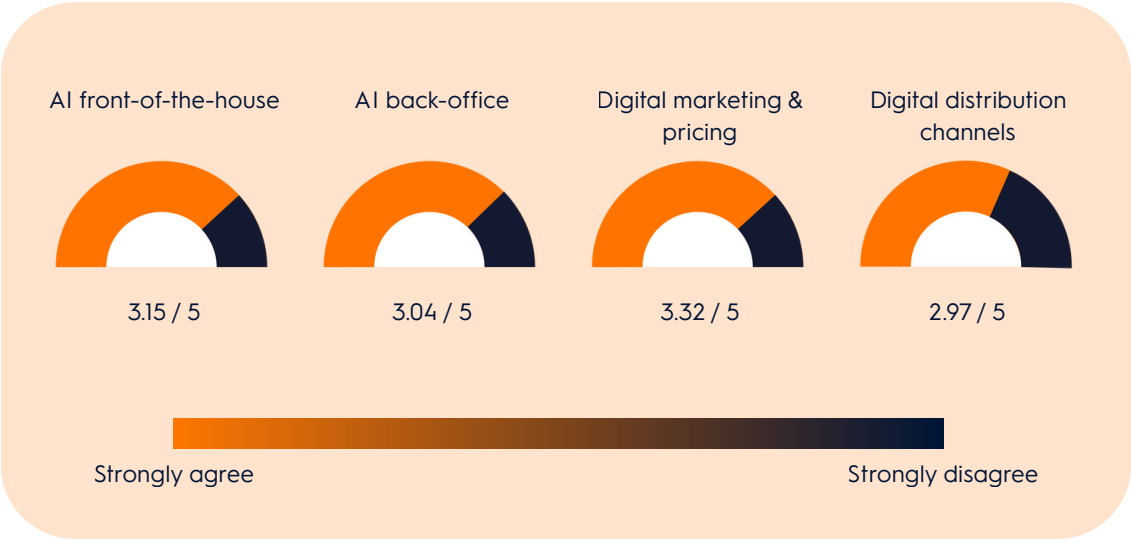

Figure 5: Is technology becoming the backbone of foodservice operations?

As Figure 6 shows, companies perceive themselves as performing on par or better than their competitors on four key performance metrics: profitability, customer loyalty, sales growth and service diversification.

Overall ratings fall between 3.4 and 3.7 out of 5, suggesting a broadly confident self-assessment of competitive standing. This indicates that firms see themselves as maintaining a solid competitive position and delivering consistent value across both operational and strategic dimensions.

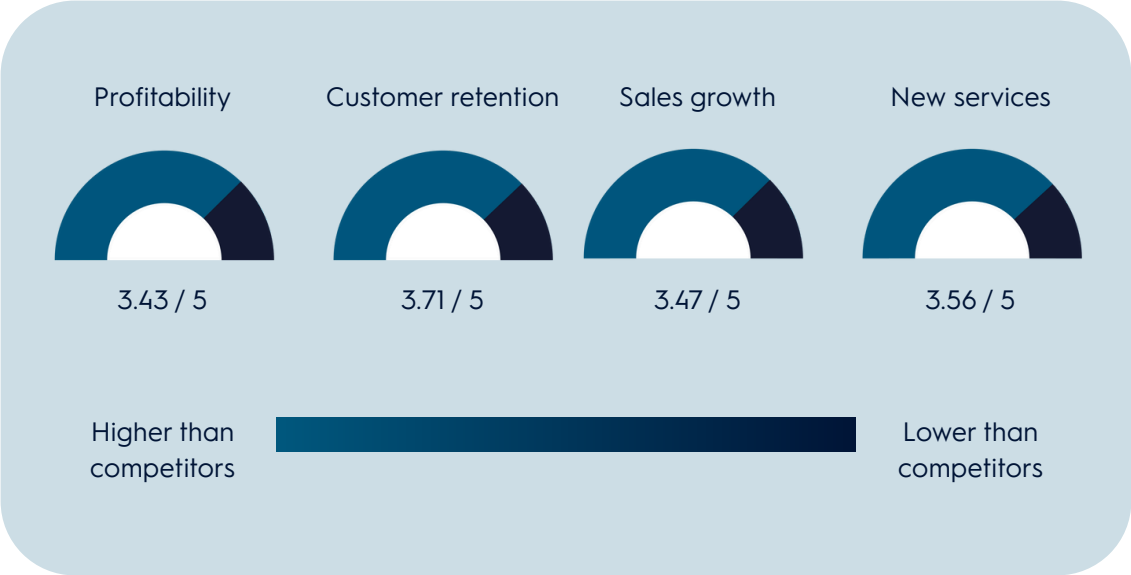

Figure 6: Perceived competitive standing across key metrics

Overall, the sector sees itself as innovative and competitively well positioned. Sustainability and digital/AI capabilities are developing, but effectiveness remains uneven—stronger in day-to-day practices than in measurement, governance, or core AI operations. Even so, companies report performing on par with or ahead of competitors across profitability, growth, retention, and new service development.

2. Methodological Note

This executive report is informed by global insights from the 2025 STREST survey of foodservice operations a research project designed and led by Dr. Carlos Martin-Rios, with fieldwork and analytical preparation conducted by Dr. Carlos Martin-Rios and Julneth Rogenhofer. The survey was administered online via the Qualtrics platform and distributed globally through email networks. It was offered in seven languages—English, Spanish, Japanese, Mandarin, Thai, French, and German—to ensure broad accessibility across regions and operator types.

Fieldwork took place between April and July 2025 and covered the full spectrum of commercial foodservices, from independent and family-owned firms to national and international chains, and across establishment sizes and service formats (see Figure 7 on the following page). The target population consisted of senior and top management roles—owners, CEOs, general managers, operations directors—ensuring that responses reflected strategic and organizational-level decision-making.

We employed multi-item measures with five-point Likert-type scales. For each construct, respondents evaluated fact-based statements about their organization on a scale from 1 (totally disagree) to 5 (totally agree). The approach captures perceived effectiveness and organizational capabilities rather than attitudes or opinions.

Results presented in this executive report are intentionally high-level and de-identified: they synthesize directional patterns and aggregated insights only. We do not disclose specific quantitative results, statistical outputs, or identifiable data. The detailed analyses—correlation structures, regressions, segment comparisons—are reserved for forthcoming academic publications.

The sample reflects a diverse mix of organizational scales, with meaningful representation from both large operators (250+ employees) and small businesses (5–49 employees), alongside a wide variety of service models. Findings are descriptive and exploratory, not intended to claim representativeness at the global level, but to illuminate emerging configurations and capability patterns across the sector.

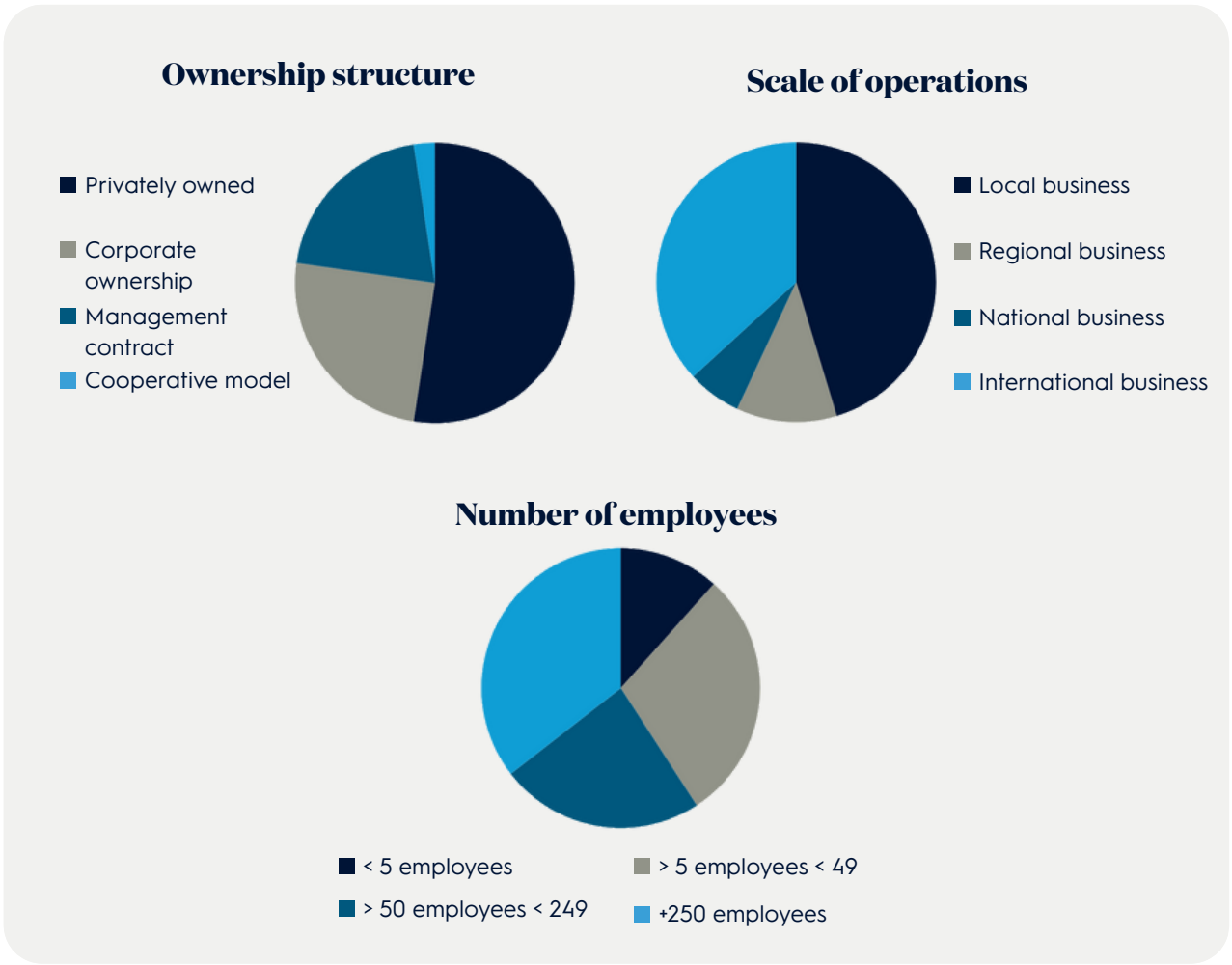

Figure 7: Survey descriptive data

We categorized responses into nine distinct types, each reflecting a unique segment of the hospitality and dining landscape. This distribution provides valuable insights into the diversity of foodservice models and their prevalence across different contexts, operational practices, sustainability strategies and innovation engagement within each category.

Categories are listed based on the number of survey responses:

- Hotel restaurants emerged as the most represented category. These establishments are located within hotels and cater primarily to guests offering full-service dining experience as part of the broader hospitality offering.
- Casual restaurants feature a relaxed atmosphere and moderately priced, basic meals without the formality of fine dining.
- Fine dining establishments are on the high-end of the industry spectrum, offering gourmet cuisine, a refined ambiance and exceptional service.
- Catering and events services highlight their role in providing food and beverage solutions for special occasions such as weddings, corporate functions and private gatherings.
- Café, bar and pub serve as social spaces where patrons enjoy drinks and light meals in a more informal setting.
- Quick-service and fast-food outlets focus on speed and convenience, offering standardized menus and minimal table service.
- Cafeterias and food courts are typically found in institutional settings like schools, hospitals and malls offering self-service and a variety of food options from multiple vendors.
- Food trucks carts and stalls represent mobile and temporary food vendors that provide flexible location-based dining experiences.
- Finally, passenger travel services (travel and leisure transport services) are mobility services in leisure travel including cruises and airline line operators.

3. Operational and Business-Model Transformation

Across the global sector, innovation is widespread but uneven. Most firms engage in operational improvements—new menus, revised workflows, equipment upgrades—but few translate these into disrupting their business-as-usual model. Much of the innovation activity is reactive: adapting to rising costs, adjusting menus to supply volatility or improving processes to compensate for labor shortages. Innovation is used to cope, not to set direction.

Innovation is a defensive reaction to challenges, not a proactive declaration of intent

Companies position themselves along five axes: price vs. quality leadership; new vs. existing goods; larger vs. narrow service offering; existing vs. new customers and customer-specific vs. standardized solutions (Figures 8-11).

For price leadership, operators split meaningfully by profile: smaller and quick-service formats tilt toward price plays, while larger multi-site groups are more selective. This is a cost story and not really a culture story—price leadership clusters where margins are thinnest, and throughput is king.

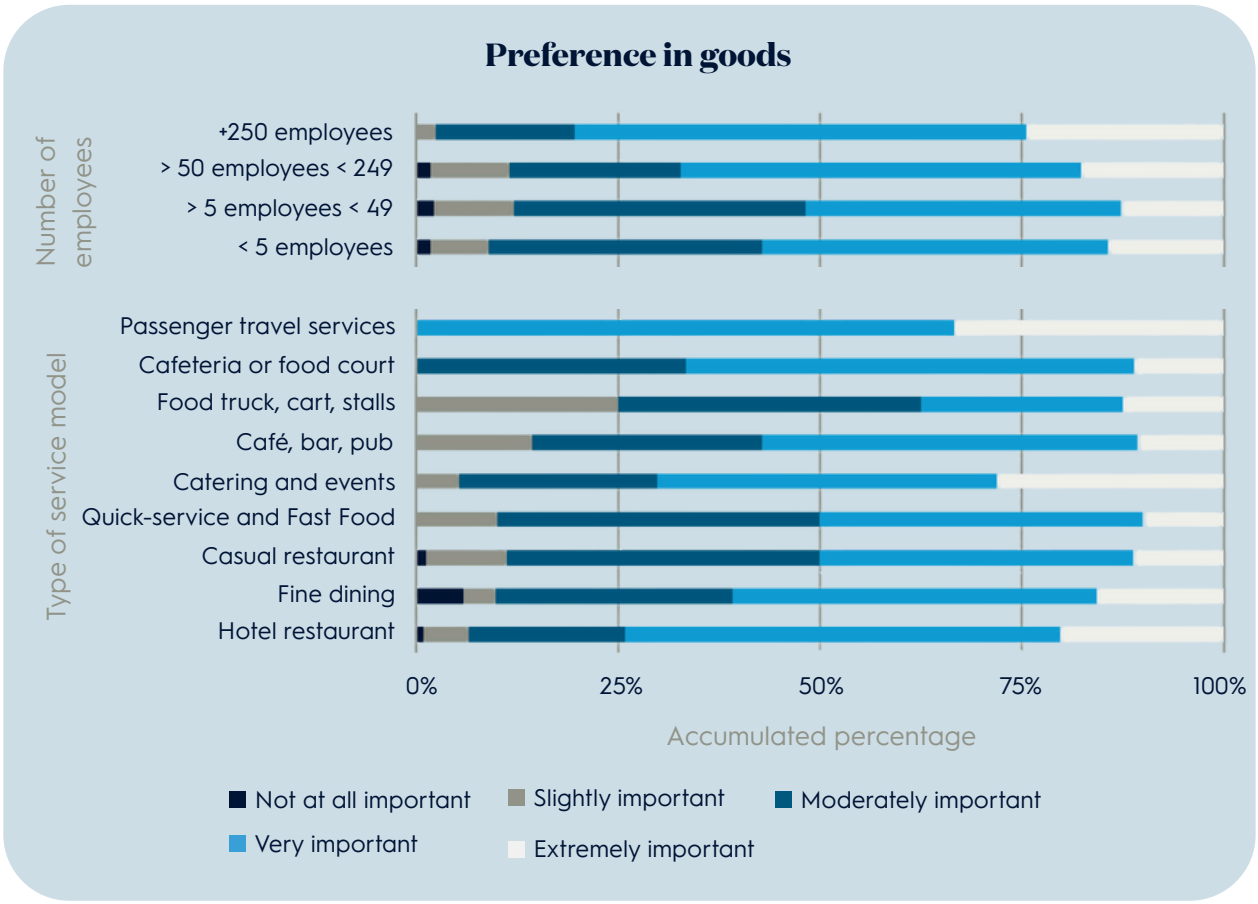

Figure 8: Prioritizing new goods or services by number of employees and type of service model

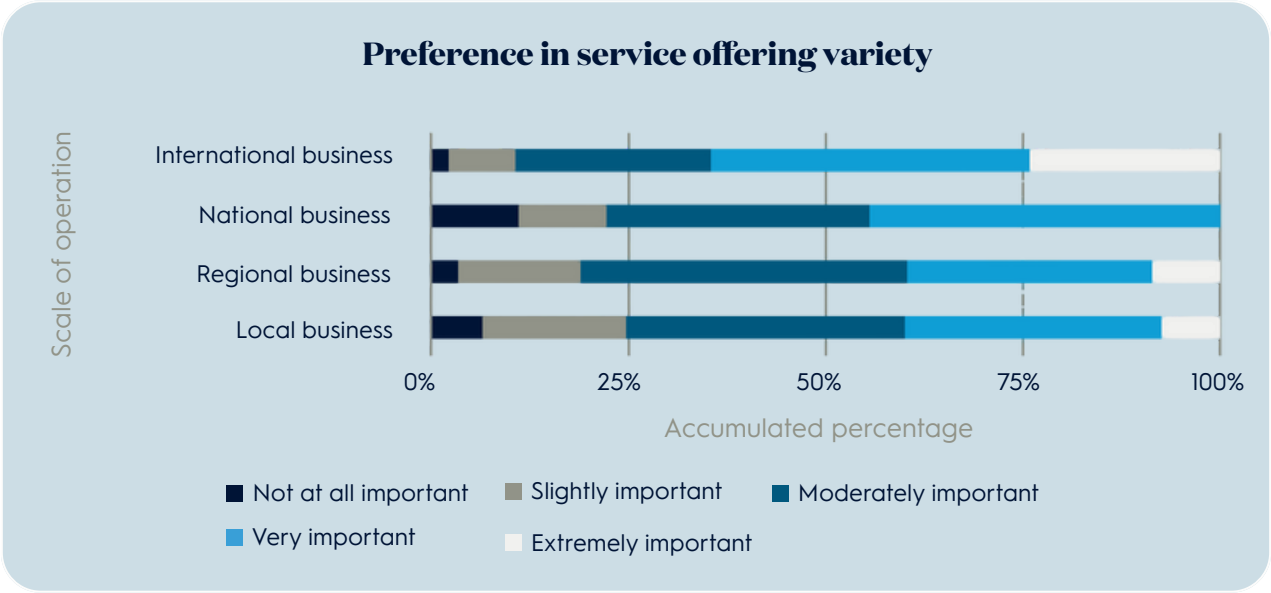

Figure 9: Prioritizing wide service offering by scale of operation

In terms of emphasis on quality, new goods and services (Figure 8), and range of services (Figure 9), international and corporate-owned operators diversify menus/services more often, signaling portfolio hedging in volatile demand. Independents and single-location businesses concentrate heavily on existing customers (Figure 10), reinforcing craftsmanship and operational simplicity.

The emphasis on new customers is driven by international brands. Specialization becomes a competitive advantage: fewer SKUs (product/menu range), tighter execution, clearer storytelling.

Preference in customer loyalty

	Established Customers				New Customers			
Scale of operation	Local business	Regional business	National business	International business	Local business	Regional business	National business	International business
Less important	<5%	<5%	<5%	<5%	<5%	<10%	<5%	<5%
Medium important	10-15%	<10%	10-15%	<10%	<25%	10-15%	15-20%	<10%
Very important	>80%	>80%	>85%	>90%	>60%	>70%	>70%	>90%

Figure 10: Prioritizing existing vs. new customers by scale of operation

When positioning between customer-specific vs. standardized solutions (Figure 11), B2B-leaning formats and higher-touch segments adopt customization more than standardized peers, generating value through closer client relationships and greater flexibility. Standardization clusters in quick-service and high-volume channels bank on speed and consistency to gain an edge.

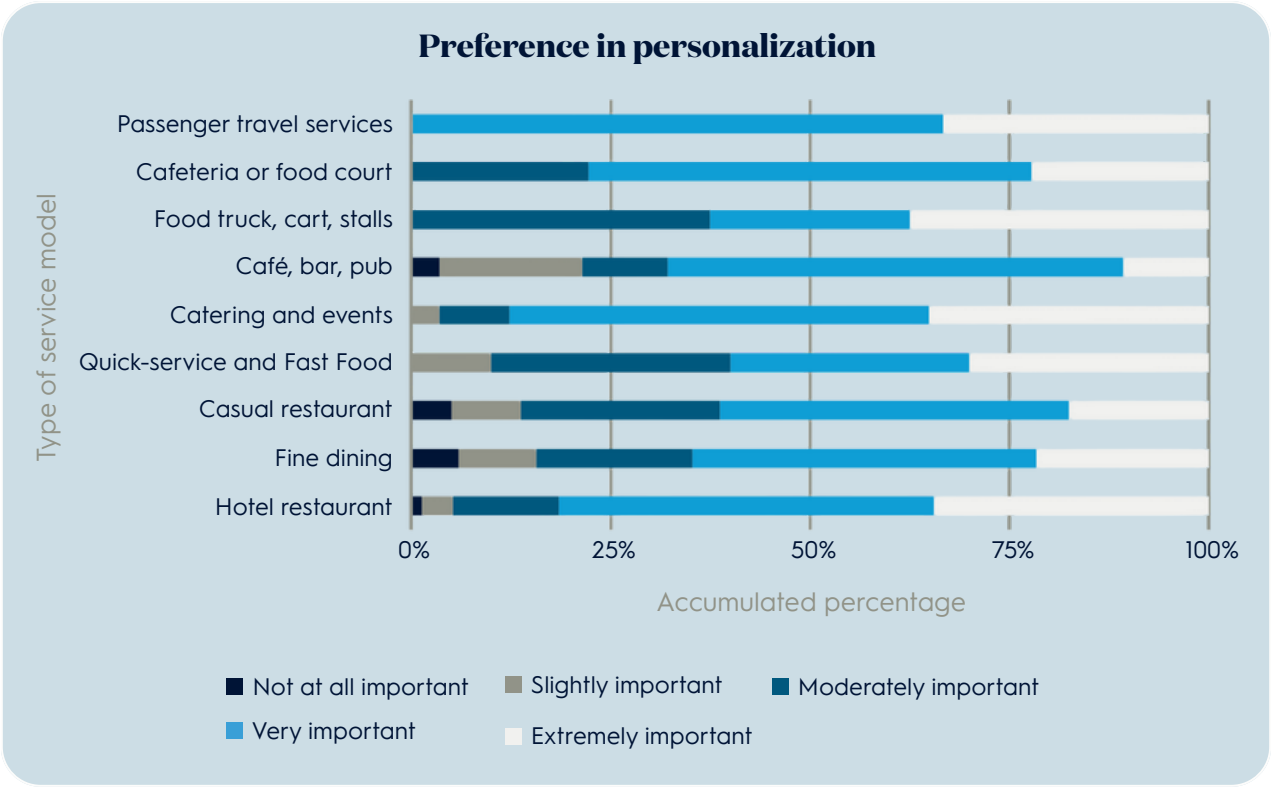

Figure 11: Preference in personalized solutions by type of service model

These strategic orientations are not only descriptive of the present but indicative of how different business models may fare under future market volatility; firms that diversify cautiously or invest in new customer segments today are effectively positioning themselves for the competitive scenarios emerging over the next five years.

The result is a sector that is innovative in practice, but conservative in structure. Many firms experiment, but few institutionalize those innovations.

The Shape of Innovation: Weak but Evolving

With regard to how businesses address their innovative capacities, it is important to assess what resources the sector is currently investing in.

- Innovation 'explorers' skew toward hotel restaurants, fine dining, cafés/pubs, and larger employers, indicating that resource depth and professional structures support more active idea exploration. This reflects an execution gap: scale converts curiosity into pilots.
- International operators and corporate ownership show a higher market-scouting posture, suggesting that expansion experience, multi-market exposure, and formalized roles strengthen opportunity recognition.
- When assessing the ability to adapt quickly to changing customer needs, speed favors the two extremes: nimble independents and well-resourced chains both outperform the squeezed middle. Agility is either founder-driven or process-driven—different routes, same outcome.
- Innovation-supportive cultures are strongest in international and national businesses, consistent with professionalized change management and organizational learning. Smaller businesses are more divided, with many viewing formal innovation structures as a constraint rather than an enabler of creative problem-solving and risk-taking.

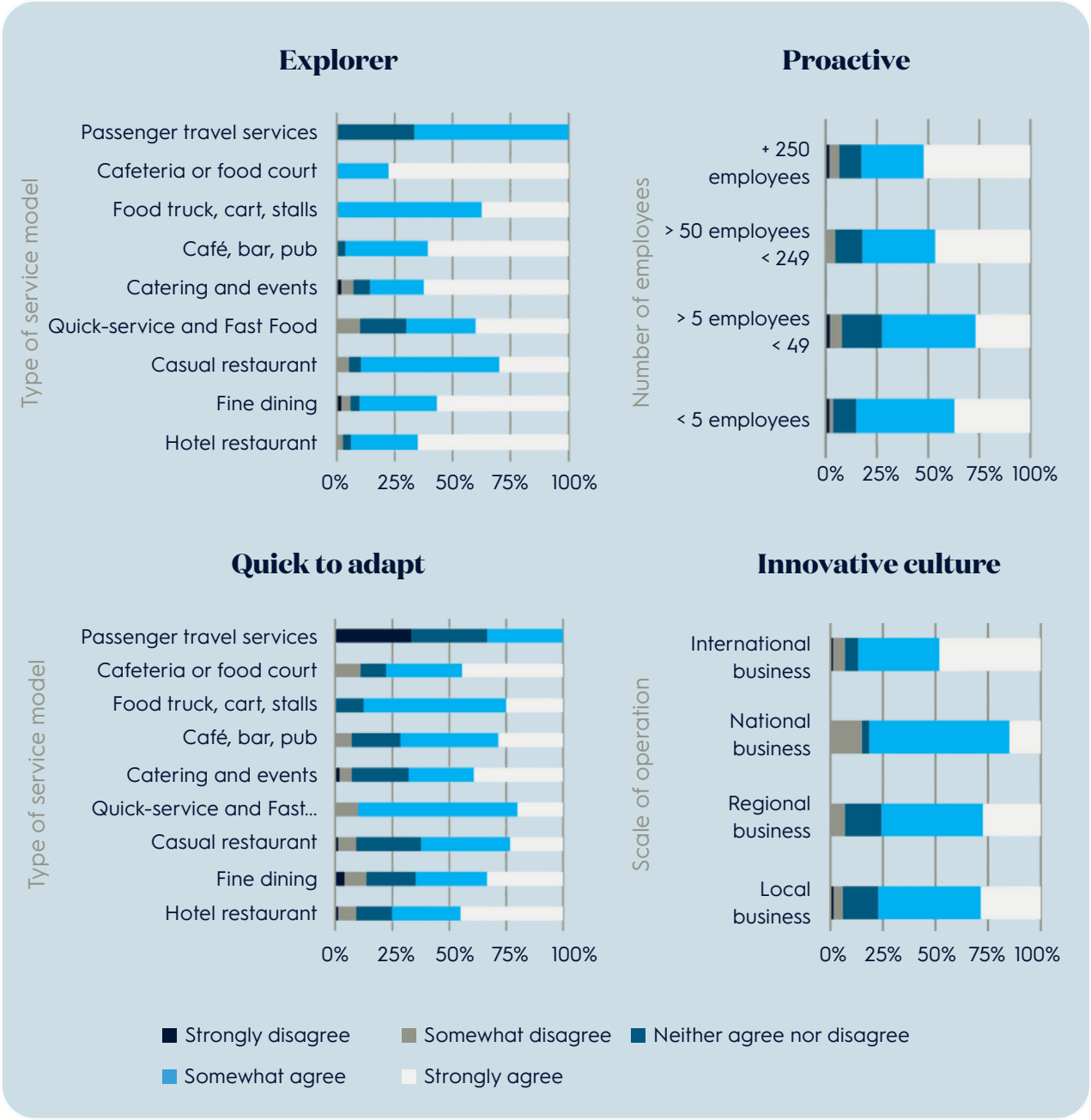

Figure 12: Innovation maturity

Taken together, the four indicators shown in Figure 12 capture different dimensions of innovation maturity. "Explorer" reflects a willingness to search for new ideas; "Proactive" signals how actively firms pursue emerging market opportunities; "Quick to adapt" shows how rapidly they respond to shifting customer needs; and "Innovative culture" describes whether the organizational environment supports creative problem-solving and risk-taking. Read as a whole, the pattern is unmistakable: the sector expresses strong intent across all four dimensions, but the consistency and depth of these capabilities depend heavily on scale, ownership model, and format. The frontier firms are those that can turn exploration into structured proactivity, while mobilizing rapid adaptation and sustaining a culture where innovation becomes routine rather than episodic.

4. How Sustainability Actually Works

Sustainability in foodservice does not advance through isolated projects or one-off initiatives; it emerges from how well firms embed social and environmental priorities into their daily operations and decision systems.

This section examines how sustainability actually works in practice by unpacking the capabilities that enable meaningful progress—and the structural barriers that continue to hold the sector back.

The Sustainability Capability Stack

Sustainability in foodservice is most effective when it is built as a multi-layered capability rather than a set of disconnected projects.

We conceptualize this as a Sustainability Capability Stack (Figure 13), consisting of:

- Food waste management: adoption of monitoring tools, menu optimization, smaller batch production.
- Energy efficiency: upgrades to equipment, HVAC and lighting improvements.
- Supply chain & procurement: adoption of sustainable sourcing criteria and early moves toward circular partnerships.
- Operational processes & standards: formalizing sustainability practices through SOPs and monitoring routines.
- Staff engagement: increased training in sustainable practices.

Figure 13: Sustainability Capability Stack

Why Sustainability Change Stalls

Despite progress, sustainability innovation often remains partial or inconsistent.

- Disconnection from pricing and costing: sustainability beyond "local" rarely affects menu design, costing systems or purchasing decisions.
- Operational reach: sustainability teams have limited influence on daily operations.
- Supplier variability: inconsistent standards for regenerative or circular sourcing.
- Weak data integration: poor visibility into waste, energy or material flows limits decision-making.

"Sustainability works when it becomes operational, not ornamental."

Figure 14 below is striking because it reveals a persistent segment of operators with no sustainability practices and no plans to introduce them. Around one in five businesses report no movement on foundational areas such as reporting, measurement, circularity or governance—signals that go beyond being "behind the curve" and point to a genuine lack of intention.

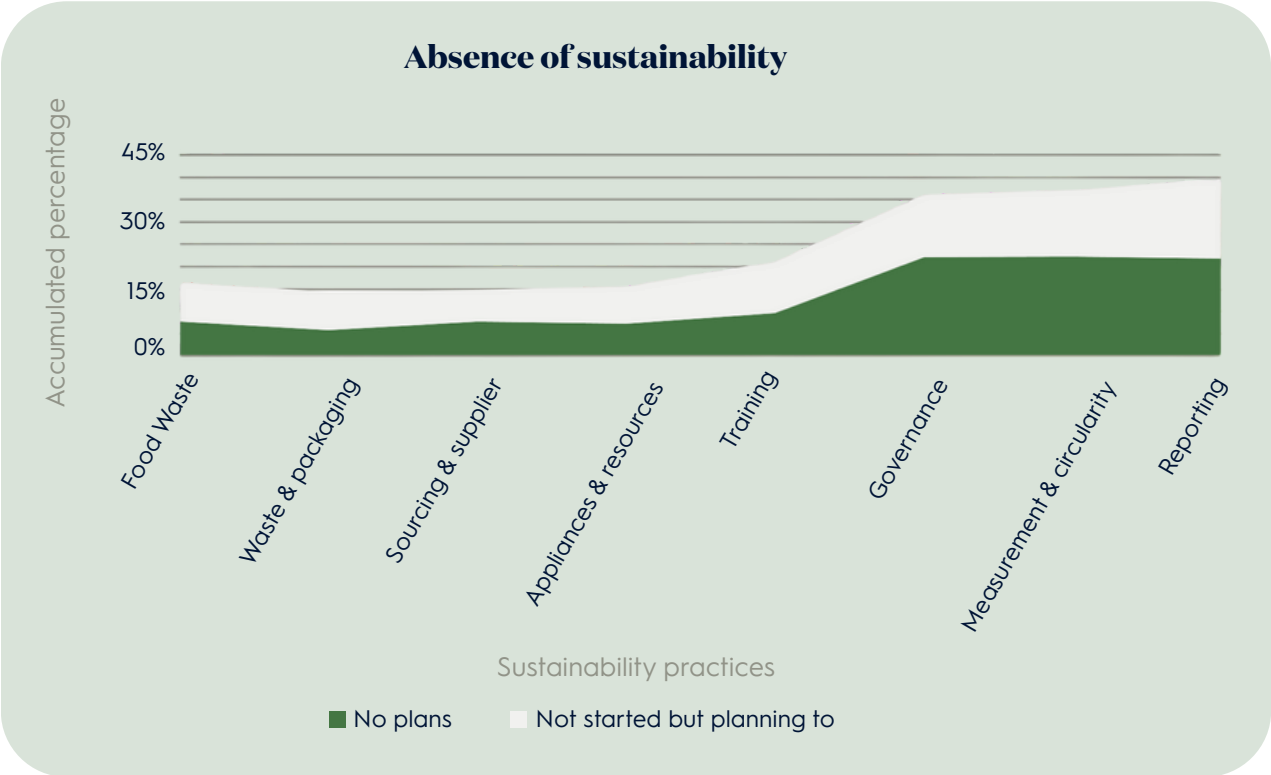

Figure 14: Absence of sustainability measures

These are not firms struggling to catch up; they are firms opting out. Even in operationally straightforward areas like waste programs, appliances or training, a substantial share indicates that they have no current initiatives and no future plans to implement sustainability (Figure 15).

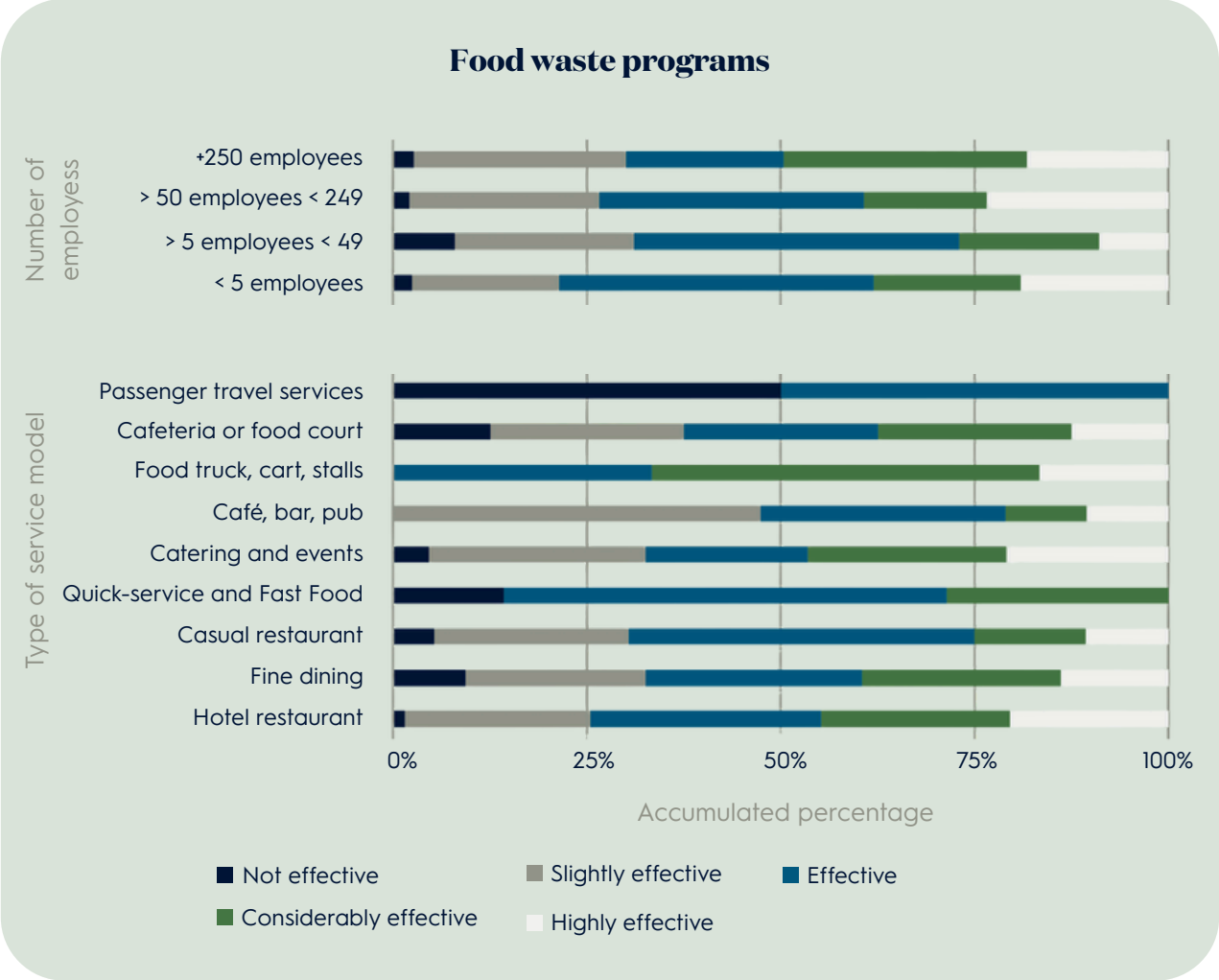

Figure 15: Effectiveness of introducing food waste programs by number of employees and type of service model

This pattern underscores a structural reality: while many companies are progressing toward embedded sustainability practices, a substantial minority remains unaligned with the transition, which reinforces the uneven map of sustainability ambition across the sector.

Circularity and Regenerative Ambitions

The industry's sustainability landscape remains highly fragmented and clustered into three broad ambition zones (Figure 16). At the lower-effort end, most operators concentrate on basic operational improvements or have yet to articulate a sustainability agenda. These firms treat sustainability as either peripheral or compliance driven.

As ambition rises, we observe more structured approaches towards formalized policies and practices. Some businesses are early adopters of circular initiatives, typically driven by rising customer expectations and corporate strategy. The most advanced group is small but growing: operators experimenting with regenerative and systemic approaches that reconfigure their business vision to adopt resource flows and nature-design practices. While still outliers, these forward-thinking models illustrate where the sector is heading as environmental and market pressures converge.

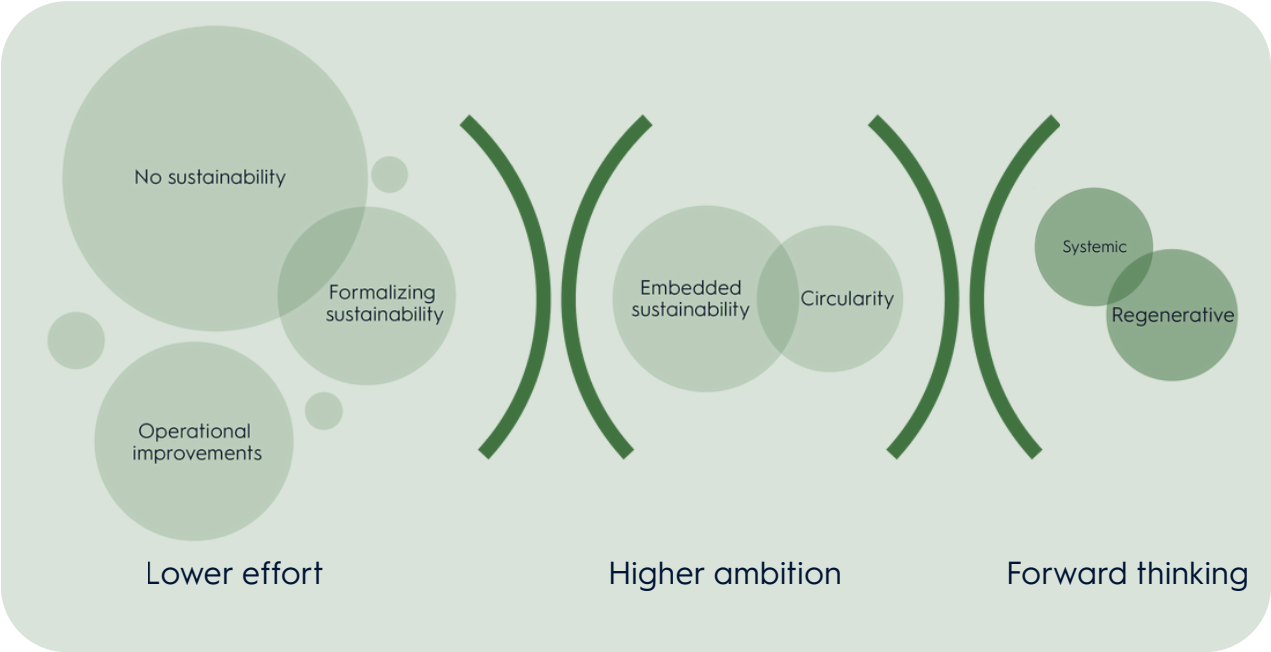

Figure 16: Industry configuration around sustainability ambitions

In terms of measurement and circularity (Figure 17), larger employers and international operators are more likely to report these practices as effective, reflecting their stronger reporting systems, data infrastructure, and compliance exposure. National and regional chains follow closely, whereas local and micro-operators show more neutral or mixed responses—pointing to capacity limits rather than lack of interest. Hotel restaurants, fine dining, quick service, and catering/event formats also report higher effectiveness, consistent with their structured processes and higher operational visibility.

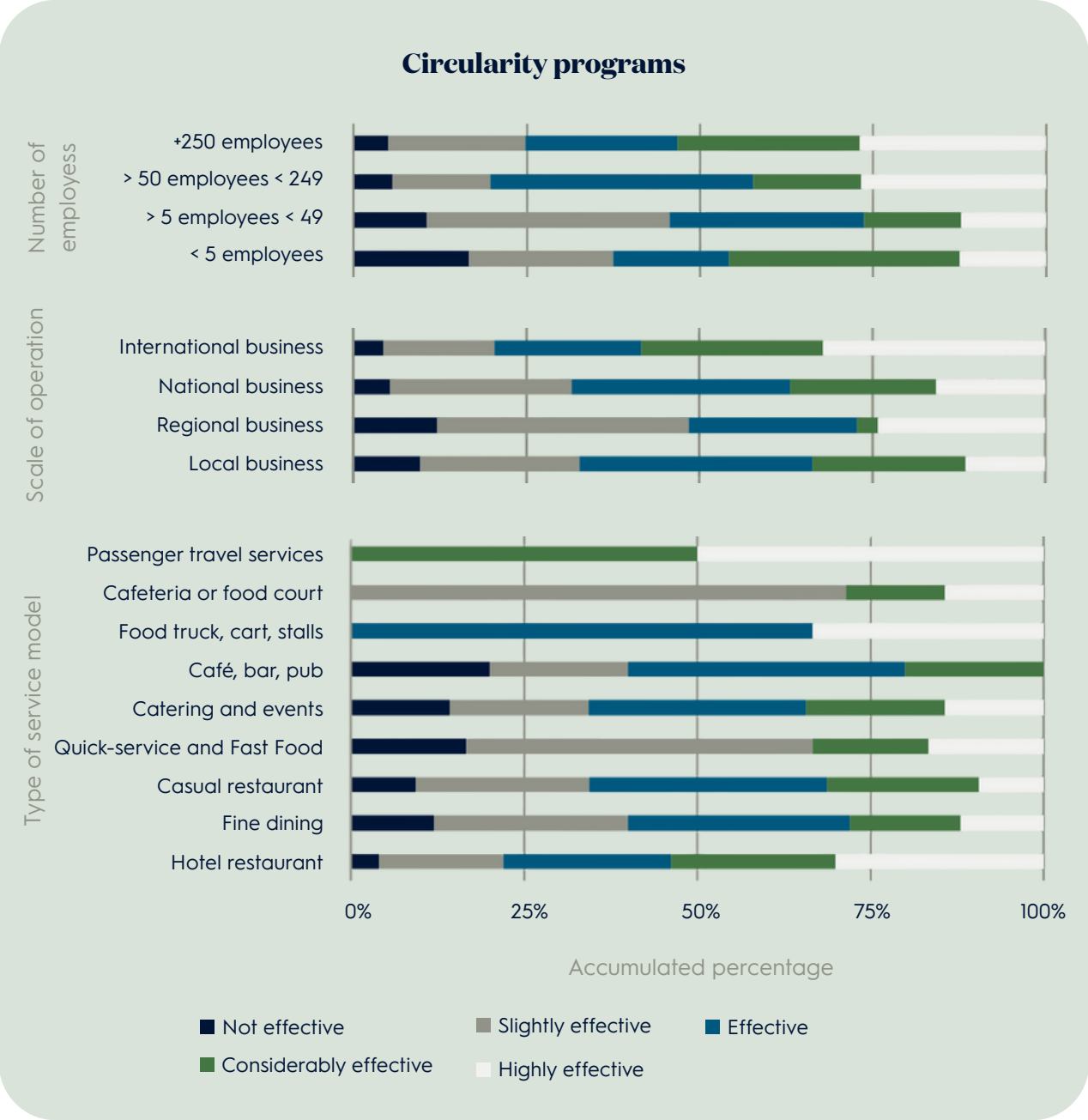

Figure 17: Effectiveness of introducing measurement and circularity actions by by number of employees, scale of operation and type of service model

Beyond what the chart displays, other survey items and qualitative inputs show that closed-loop and regenerative actions such as reducing single-use inputs, adopting biodegradable or reusable containers, and implementing recycling and upcycling systems are entering the agenda for a growing subset of operators.

In customer-facing formats, front-of-house visibility amplifies uptake, with packaging increasingly functioning as a signal of brand behavior as much as an operational choice. Together, these patterns underscore that effectiveness rises with scale and structure, while more advanced circular practices emerge where capabilities and customer expectations intersect.

5. Generative AI Revolution

As the sector moves into the next cycle of transformation, sustainability and technology will increasingly form parallel capability races, shaping which firms can comply with new reporting demands, capture AI-enabled efficiencies, and adapt to more dynamic customer expectations.

This section examines how digitalization and generative AI actually function in foodservice—what capabilities matter, why adoption stalls, and where meaningful innovation is beginning to take shape.

AI is constrained by:

- Poor data hygiene: inconsistent formats, incomplete records, fragmented systems.
- Legacy infrastructure: POS and procurement systems not designed for advanced analytics.
- Capability gaps: lack of data literacy and algorithmic understanding at managerial and operational levels.
- Vendor dependence: limited internal capacity to interpret or validate AI outputs.

"AI will not fix operational chaos; it will amplify it."

The Technology Capability Stack

Like sustainability, implementing technology in foodservice is most effective when it is built as a multi-layered capability rather than a set of disconnected projects.

We conceptualize this as a Technology Capability Stack (Figure 18):

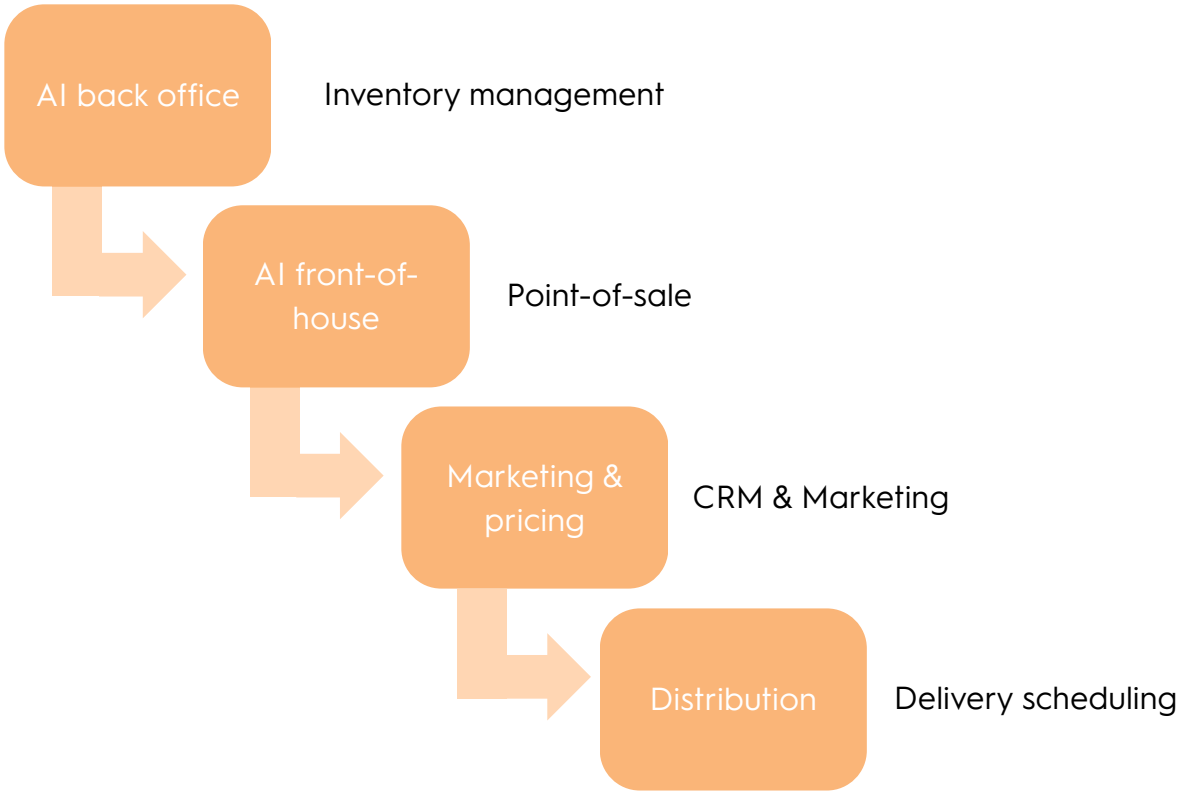

Figure 18: Technology Capability Stack

- AI-based solutions to make ordering and service easier through apps, robots and online platforms.
- Automation or AI-enhanced solutions for back-office, where generative AI automates tasks like inventory, accounting and HR to save time and reduce errors.
- Digital marketing and pricing technologies (e.g., dynamic pricing, personalized recommendations, loyalty management)
- New technology-based distribution platforms that connect businesses with customers through delivery apps and online ordering.

Why Digital/AI Change Stalls

Generative AI and digital tools are undoubtedly the most popular technological innovation being rolled out in foodservice. But uptake does not equal integration. In fact, over half of the firms interviewed are not planning to introduce generative AI innovation as a strategic priority (Figure 19). As for the rest, many firms indicated that they are accumulating digital tools without connecting them, which results in siloed data, duplicated work and limited insight.

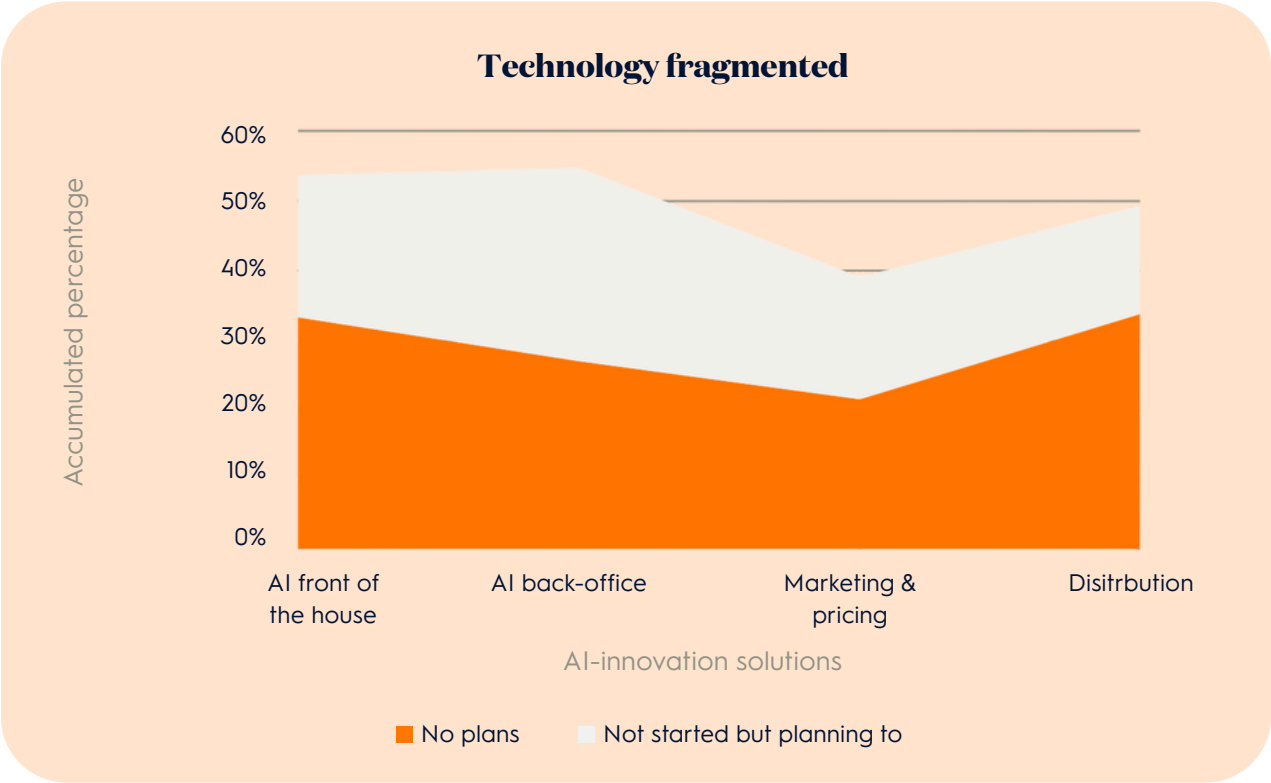

Figure 19: Technology fragmented

AI Innovation: One Cycle Behind Digital

Generative AI adoption is growing but remains one full adoption cycle behind digitalization. Nevertheless, several use cases have shown early promise in the following areas:

- Demand forecasting
- Dynamic scheduling and labor optimization
- Menu engineering support
- Customer interaction assistants
- Back-office automation (invoicing, reconciliation)

However, most projects remain pilots with limited organizational impact.

Figure 20 shows a clear structural pattern: AI-based front office solutions are significantly more embedded in large, multi-unit and brand-led operators than in local or independent businesses. Techs include generative AI for ordering and service through apps, robots and online platforms.

For these firms, AI demand generation (e.g., using algorithms to predict customer flows, tailor offers, optimize pricing, and personalize engagement to increase traffic and conversion) is still in the experimental phase. However, it is expected to shape revenue management and customer acquisition/retention, as well as market positioning.

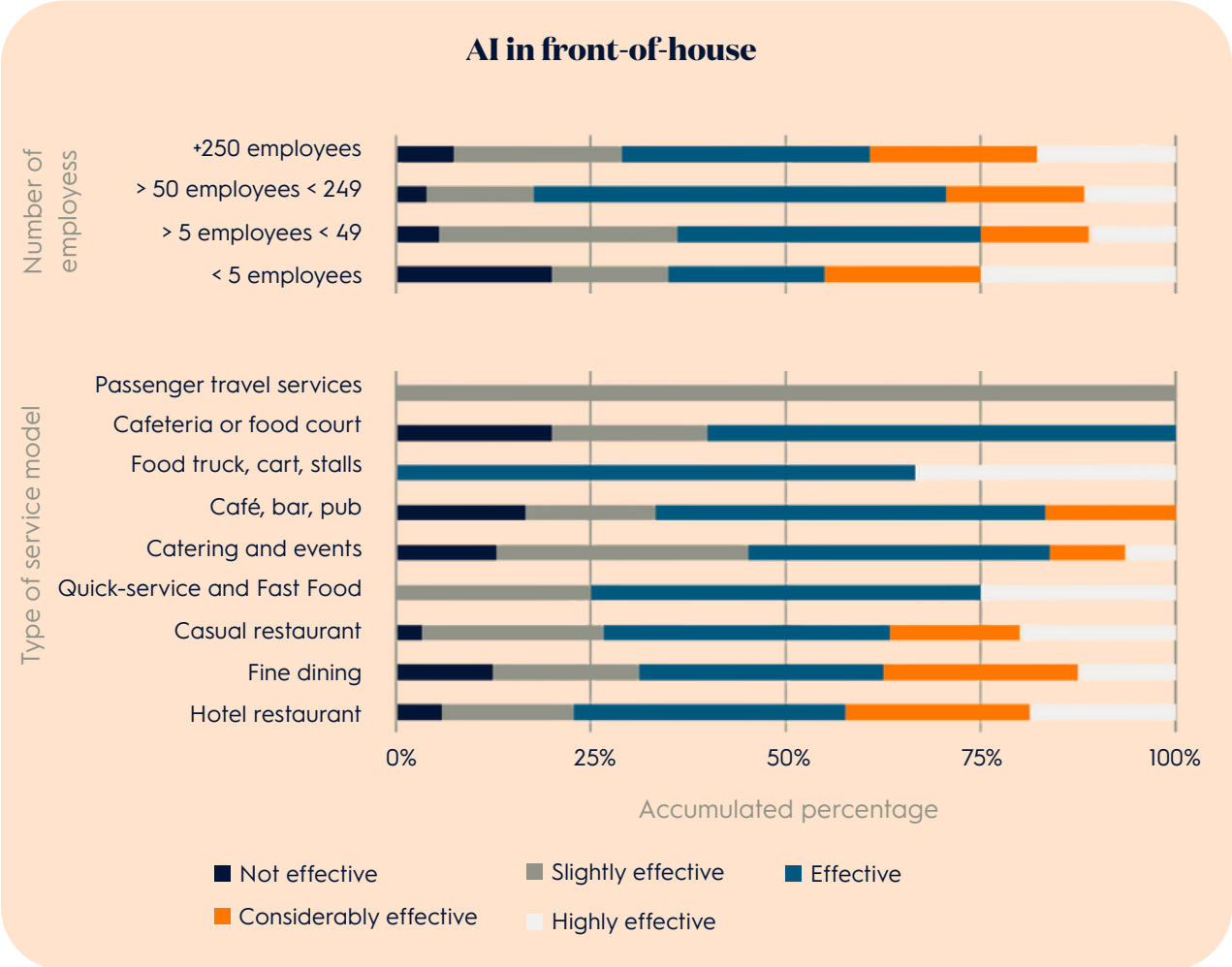

Figure 20: Effectiveness of AI use in front-of-house by number of employees and type of service model

Across segments, technology-driven distribution is now deeply woven into quick-service, fast-casual, cafés and travel-service formats, where speed, volume and high transaction frequency reward digital integration. These segments consistently report the highest effectiveness of third-party delivery platforms, aggregator apps and direct online ordering portals. For operators built around convenience and throughput, platforms are not an add-on but the very backbone of their operating environment.

Local and independent outlets still use these tools, but with lower and more uneven perceived effectiveness. This reflects a variety of impediments such as limited negotiating power, weaker brand visibility on platforms and higher commission sensitivity. Yet even here, digital distribution is gaining traction as a table-stakes capability (a basic competitive requirement) rather than an optional channel.

Market Outlook & Strategic Pathways: Future Scenarios For 2026-2030

Looking ahead, four paths stand out:

1. Integrate sustainability and digital operations

The next stage of progress will come from joining these strategic threads, not treating them as separate agendas.

2. Move from pilots to systems

Scaling matters more than experimentation. Firms must embed innovation into processes, roles and routines.

3. Build internal capabilites

Training, digital literacy, sustainability competencies and data skills will shape competitive advantage.

4. Strengthen supplier partnership

Circularity, regenerative sourcing and AI-enabled forecasting all depend on better supplier relationships.

Digital capability

Sustainability	No emphasis	Little emphasis	High emphasis
No emphasis	Passive operators	Tech-light improvers	Tech-driven minimalists
Little emphasis	Sustainability-light catch-up	Incremental majority	Tech-forward optimizers
High emphasis	Sustainability-forward minimalists	Sustainability-led improvers	Balanced pioneers

Table 1: Capability map

These dynamics set the stage for increasingly divergent scenarios in which integrated operators consolidate resilience and growth, while fragmented operators face rising exposure to cost shocks, regulatory pressure, and digital discontinuities.

The matrix in Table 1 above reveals an industry that is unevenly innovating across two strategic axes—sustainability and AI/digital capability.

It synthesizes broad patterns observed in the survey rather than reporting numerical shares, but the overall distribution is clear: most operators cluster in the central bands, taking incremental steps without fundamentally shifting their operating model.

While Table 1 reflects the current positioning of operators along these two capability axes, the distribution is likely to shift as AI-as-a-service models expand and sustainability requirements tighten, pushing firms toward more integrated capability configurations.

At the extremes, firms with high AI capability but low sustainability (tech-driven minimalists) typically outsource or rent advanced tools—often adopting "AI-as-a-service" solutions—to drive efficiency without reconfiguring their ecological footprint. Conversely, operators with strong sustainability ambition but weak AI capability (sustainability-forward minimalists) often rely on local initiatives and supplier partnerships that are difficult to scale consistently.

One plausible scenario for 2026–2030 is a widening divide between firms that succeed in linking sustainability, data, and AI into coherent operating systems and those that continue to accumulate unconnected tools and practices.

The most competitive segment—the balanced pioneers—remains comparatively small: these are firms—restaurant groups, hotel operations, and multi-site brands—that treat sustainability, data, digital systems, and AI not as parallel projects but as mutually reinforcing levers. The strategic takeaway is clear: advantage does not come from excelling on one axis alone but from the ability to integrate capabilities across both. As cost pressures intensify and regulatory expectations tighten, operators combining ecological intelligence with digital and AI-enabled operations will be positioned to shape—not merely survive—the next cycle of industry transformation.

7. Conclusion

The foodservice industry is at a pivotal moment, driven by a two-speed logic. On the one hand, small businesses often lack the resources to systematically adopt sustainability measures or effectively integrate AI. On the other hand, large businesses are treating sustainability, digitalization, and AI innovation as individual solutions, missing out on opportunities. Sustainability innovation is stronger when outputs are tangible and measurable. There is a disconnection between sustainability and operational teams. Digitalization is more prevalent and understood than AI, however weak data integration makes it harder to make informed and forward-looking decisions. Most businesses in the foodservice industry are not prepared for AI. They lack knowledge and infrastructure, yet there are large opportunities for them to integrate AI into their ecosystems. This executive report aimed to provide food for thought on how the foodservice industry can move forward, leveraging the innovative solutions at its disposal. The goal was to initiate a discussion on what can be done and guide industry experts to adopt these solutions.

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