

**FOOD SERVICE  
TRENDS 2025**

# FOOD SERVICE: CONSUMER TRENDS AND OPPORTUNITIES



I'm pleased to share our latest Market Report, building on the **2024 Food Sector Trends & Opportunities Report** published in January.

2024 could feel like a quiet year, following the unprecedented challenges faced in recent times. Indeed, through the first part of 2024, inflation began to fall and disposable income and consumer confidence started to show positive signs of recovery.

In reality, however, 2024 has been far from quiet, with plenty of challenges ahead.

Interest rate changes, an election, new government and the upcoming budget and from a global perspective the US election in November, are all having an impact. The improving trend in consumer confidence faltered in September with many analysts blaming speculation around the Autumn budget.

In addition, neither the conflict in Ukraine or the escalating crisis in the Middle East look close to peaceful resolution, resulting in ongoing global supply chain volatility. Amidst this uncertainty, our team continues to focus on retaining supply and price stability as far as possible.

Despite everything, however, consumers continue to return to the sector ensuring food service remains an exciting place to operate.

To discuss in more detail, please contact myself, your account manager or our customer service team.

**Nigel O'Donnell**  
Managing Director

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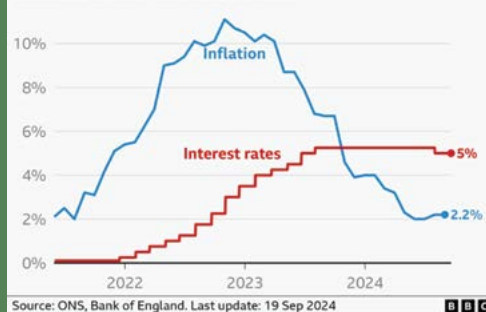
where you see this icon click for further information including menu ideas.



# OVERVIEW

## FAVOURABLE ECONOMIC TRENDS ARE FUELING MORE CONFIDENT PREDICTIONS OF GROWTH FOR THE EATING OUT MARKET

Inflation and interest rates



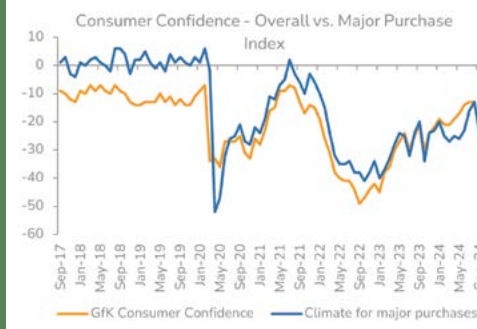
**Inflation** returning closer to the Bank of England target, resulting in a cut in **Interest Rates**

Wage growth slowing but still above inflation

Annual wage and price growth, May-Jul 2020 to 2024



As inflation falls, there is evidence of **Real Wage Growth**



Improving **Consumer Confidence** since September 2022

## The Outlook for 2025-2028

Estimates for 2024 show modest growth of 4.1% in eating out.

Predictions for 2025 and beyond are more positive as real wage growth and consumer confidence improves.

“

*Eating out will return in line with household income rise in the mid-term, but there will be an expectation from consumers for great experiences and a high-quality offer. Full service will be at a premium, creating a polarisation in the market between treat occasions and everyday QSR missions*

”

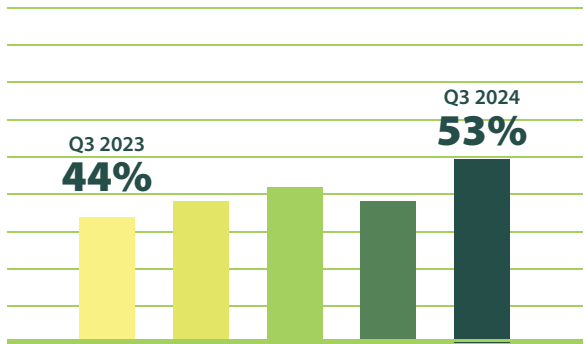
Senior IDG Analyst commented recently

# CONSUMERS EATING OUT

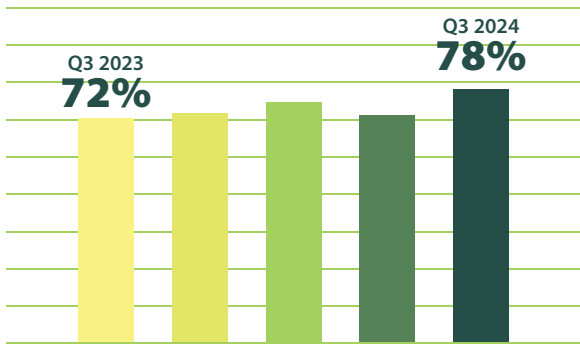
## UP FROM 24% IN 2021 TO 47% AND FORECAST TO CONTINUE TO GROW\*

Analysts put this growth down to a combination of consumers feeling the benefit of real wage increases together with 'learning to adapt' to the cost of living crisis.

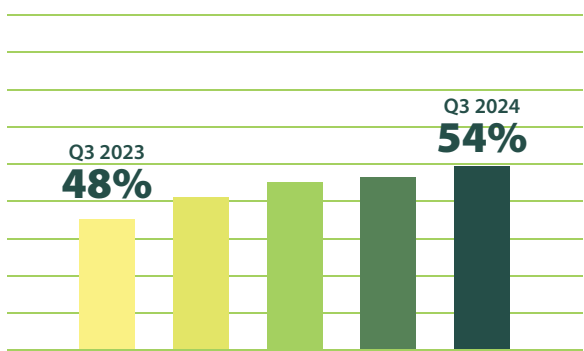
The Future Food Tracker Monthly Survey shows changes over time to the drivers for consumers who have eaten out, although, for a special occasion remains the No. 1 reason.



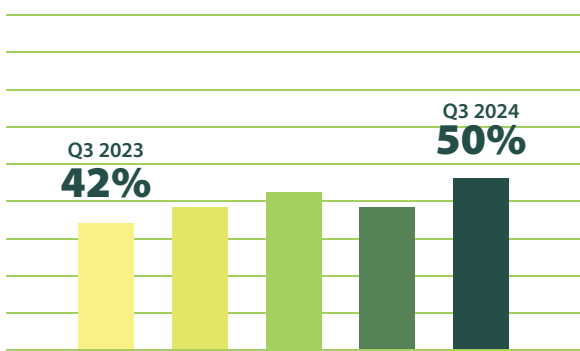
Eating out generally



Eating out for special occasions/treats



Eating out because I do not want to cook



Getting a takeaway

Q3 2023 Q4 2023 Q1 2024 Q2 2024 Q3 2024

Special Occasions  
The main reason for eating out

Eating Out Generally  
Continues to grow

This report looks at how operators can win customers over and encourage them to spend more on every visit.



\*Mintel: UK Fast Food Market

# 2024 TRENDS ARE SET TO CONTINUE AND ARE INCREASINGLY INTERGRATED

## 4 Key Trends - Taking Food Service By Storm

- 1 Chicken - A Must For Every Menu
- 2 Global Fusion
- 3 Theatre
- 4 Value For Money



## New Opportunities



**Brunch**  
is becoming  
a regular fixture

29% of consumers  
ate breakfast or  
brunch out in  
2021,  
35% in 2023\*



**Dinner**  
returning in popularity  
and remains the  
highest spend  
occasion



Source: Mintel; IDG.



# 4 TRENDS TAKING FOOD SERVICE BY STORM



## Chicken

Chicken ticks all the boxes.

For consumers looking for healthier options and for operators it is highly versatile and cost effective.

Chicken Shops are dominating the high streets in the UK from chains to independents.



## Global Fusion

Where the adventure begins.

Consumers increasingly looking to experience new and exciting flavours.

Combining this with offering customers the opportunity to personalise their meal and to experiment adds to the theatre of the OOH eating experience.



## Theatre

Increasingly consumers are looking for more than a convenient meal solution.

More often, it's a shared experience, a social gathering, increasingly important post Covid.



## Value for Money

Understanding how consumers are defining Value for Money is crucial.

It is polarising and importantly, rarely 'cheap' in the context of food service.

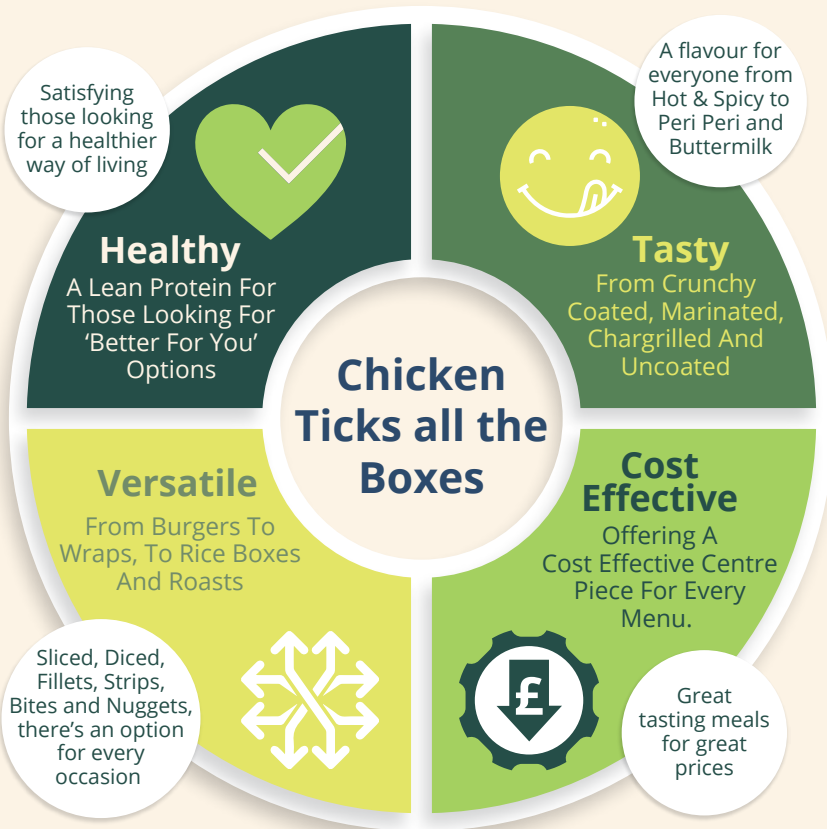
Consumers judge not just the food but the overall end to end experience tying all the trends together.



1

# CHICKEN TICKS ALL THE BOXES

## A MUST ON EVERY MENU



A chicken shop almost every **100m** on one London street.

**£2.3bn\***

2024 UK Chicken outlet and restaurant value

**£3bn\***

Est 2027 UK chicken outlet and restaurant value

**4,424**

Chicken Shops in the UK  
Up 21% since 2020

**16 - 34**  
Years Old

Main fried chicken consumers



**POPEYES**



The market appears to have room for both chains and independent chicken shops with new entrants launching across the UK.

**SUBWAY**

No. 1 fastfood in the UK.

**Chick-fil-A**

Launching in the UK in 2025



Ethnic food chains are seeing sudden growth, reflecting evolving preferences and popularity for diverse cuisines.



A clear demand for premium burgers and sharing options

2

# GLOBAL FUSION

## WHY DO WE NEED TO ADD MORE FLAVOUR TO MENUS?



Consumers broadening their horizons, discovering new cuisines through travel & social media



5 of the top 10 fastest growing cuisines from Asia



Consumers willing to pay more for more adventurous menu options



Vietnamese & Malaysian flavours, in particular are set to grow.

**Malaysian** cuisine is often a fusion of Chinese, Indian and indigenous Malay styles. Rice is the staple, backed up by balancing spices including ginger and pepper for heat with cloves, nutmeg and mace, lemongrass, chilli and galangal

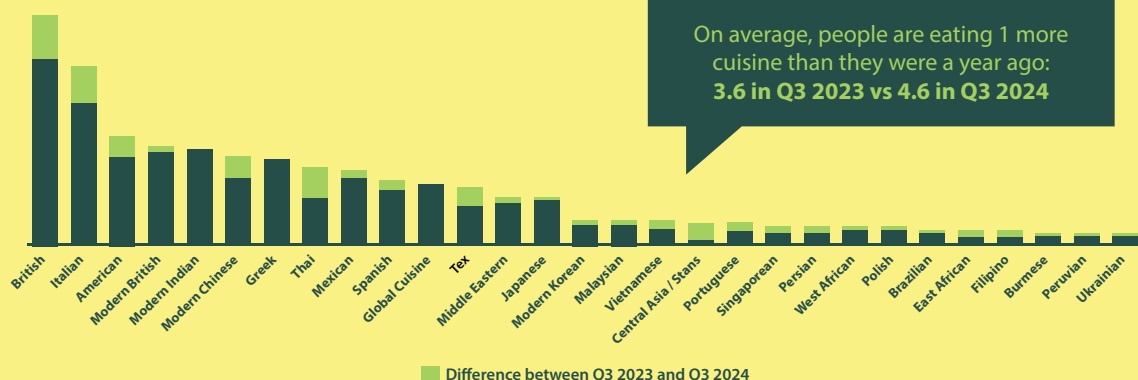


**Vietnamese** food is characterised by a refreshing and lively flavour profile using mint, cilantro, basil, and lemongrass, along with spices like star anise, cinnamon, and ginger.



### Cuisines eaten in 2024 (vs meals eaten in Q3 2024)

On average, people are eating 1 more cuisine than they were a year ago:  
**3.6 in Q3 2023 vs 4.6 in Q3 2024**



■ Difference between Q3 2023 and Q3 2024

Source: Mintel & IDG

**“Swicy”** Next-Level Spicy Foods  
The hottest (and sweetest) food trend

*“Swicy” (that’s sweet and spicy) foods may have been everywhere in 2023, but 2024 is all about going higher up that Scoville scale. Whether it’s for the challenge of ingesting multiple ghost peppers or just to feel something, excessively spicy snacks, sauces, and meals are on the rise all showcasing global heat makers, from habaneros to Calabrian chiles.*

<https://www.foodandwine.com/dining-and-food-trends-2025>





# 2

# GLOBAL FUSION ADVENTUROUS AND PERSONALISED MENUS



Customers want the freedom to customise their meals, as they do with greeting cards and mugs to trainers and gym membership.

## Personalisation: The Opportunity



### Add Theatre

Encourages more interaction and consumers feel more involved and in control.



### Cater For All

By offering personalised menus, operators can cater for the increasing range of dietary requirements and attract larger groups.



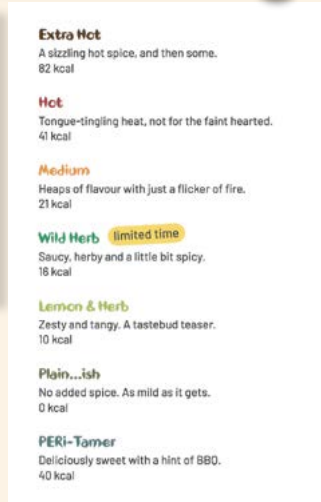
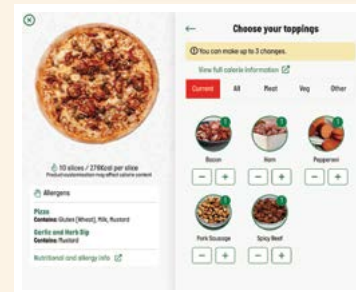
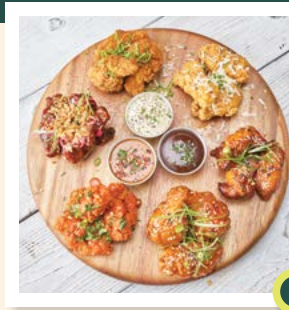
### Encourage Spend

Opportunities to trade up with additional sides, sharing platters, dips, toppings and sauces.



### Operational Efficiency

Offer the broadest of menus whilst simplifying inventory, for example using the same chicken in multiple menu options.



3

# THE THEATRE

## TODAY'S CONSUMERS ARE ON THE LOOKOUT FOR UNIQUE AND MEMORABLE MOMENTS

### Transform Your Customer Experience



**Authentic** style is the key to success. Your chance to create a signature style that connects with your audience.



Blend imaginative presentation and décor with innovative takes on classic dishes and excellent service, to quickly and effectively **elevate your customers' experience**, setting yourself apart from the competition.



Remember, the more '**Instagrammable**' the better.



**Word of mouth** will naturally draw in new customers.

“

*"To me, food is as much about the moment, the occasion, the location and the company as it is about the taste."*

*Heston Blumenthal*

”



# 4

# VALUE FOR MONEY

## VALUE FOR MONEY IS NOT THE SAME AS CHEAP

**Consumers are eating out less so when they do, they are looking for Value for Money.**

Importantly, Value for Money is not the same as cheap, and doesn't have to limit your ability to encourage consumers to spend more, but it can be polarising, and operators need to understand where to invest and where to make smart choices to protect profits.



### Treating

Combining the trends for **Adventurous** and **Customisable** menus with **Theatre** will position you perfectly to deliver **Value for Money** in the eyes of your customers.

#### Top Tips

1. Own your Style
2. Design and Decor
3. Review your menu
4. Excellent Presentation
5. Great Tasting Food: Gourmet burgers are on the rise
6. Operational Improvements to manage consistency, quality, waste and cost



### Looking for Low Cost Option

If you're operating in this area, avoid playing on price, consider ways to reduce costs and premiumise your offer to justify price and stand out.

#### Top Tips

1. Maximise the appeal of your menu
2. Offer choices and customisation
3. Start with the basics and help customers trade up to their perfect meal
4. On trend presentation adds value
5. Encourage trade up with targeted promotions, bundle deals and loyalty schemes
6. Provide staff with training and clear guidance





# TIPS FOR MANAGING CHANGE

## OPERATIONAL EFFICIENCY IS CRUCIAL TO SUCCESS

### Plan The Implementation

Implementing practical solutions will help back of house efficiency with the knock on benefit of giving you time and resource to focus on stand out service and menu.

### Focus On Back Of House

1. Streamline processes and manage costs
2. Reduce waste
3. Target skilled labour where it makes the most difference



### Top Tips



#### Save energy and time in the kitchen

- Introduce smart cooking practices e.g. batch cooking
- Take advantage of quality pre-cooked and frozen ingredients



#### Reduce waste

- Effective inventory management and portion control
- Manage shelf life, use frozen



#### Simple ingredient swaps that drive cost savings

- Careful ingredient substitutions can help reduce expenses and improve consistency
- Embrace frozen and added value products to
  - Improve consistency
  - Save time and energy
  - Streamline kitchen operations
  - Replacing raw saves time and labour
  - Reduce costs and spoilage



#### Training And Communication

- Skilled labour shortage
- Focus staff on excellent presentation of great tasting food and service

# TIPS FOR TAKING ADVANTAGE OF THE LATEST TRENDS



## One Size Doesn't Fit All



1. Consider the changes that are right for your business and customers
2. Plan the implementation carefully
3. Train and support staff
4. Monitor the changes
5. Listen to feedback



## We Are Open



1. Extended services and opening times
2. Review opening hours, can you offer a breakfast service?
3. Offer a Brunch, Lunch, Snack and Dinner menu
4. Does it make sense to offer Eat-In, Take-Away & Delivery?



## Stay On Trend



1. There are many ways to incorporate trending flavours and menu options, choose what works for you
2. As simple as offering latest flavours as dips and sauces
3. Add Specials, to test new ideas
4. Add a themed section to the menu



## Presentation and Theatre



1. Take care in the presentation as well as the quality of the food
2. Consider your menu design
3. Look for additional branding opportunities
4. Overall Decor
5. Social media presence

# GLOBAL SUPPLY CHAIN: NAVIGATING THROUGH CONTINUED VOLATILITY REMAINS A DAILY CHALLENGE

## Current Impacts

1. **Middle East Crisis** Escalation
2. **Oil prices** rose by more than 5% as Israeli troops moved into Lebanon and Iran launched missiles on Israel
3. **Red Sea disruption** and resulting diversions continue to add time and cost
4. Businesses warning of "paralysis" at ports due to **US and Gulf dockworkers strike**
5. **Schedule Reliability** remains below Pre Pandemic levels and October reliability likely to make grim reading

"The union said it shut down all ports from Maine to Texas ... as tens of thousands of ILA rank-and-file members began setting up picket lines at waterfront facilities up and down the Atlantic and Gulf Coasts"

CBS News

"Oil set for its largest weekly increase since early 2023 as Middle East tension rises."

Bloomberg 3/10//24

Bank of England governor Andrew Bailey warned on Thursday of the "very serious" potential impact and that he was watching developments "extremely closely".

Faisal Islam Economics Editor - BBC 03/10/24



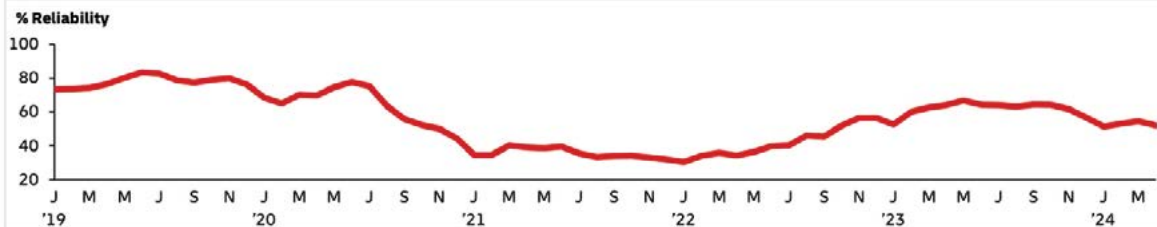
A Greek-owned oil tanker, the Sounion, was attacked by Houthi rebels in the Red Sea in August. Iran has been backing the Houthis in Yemen. Photograph: Eunavfor Aspides/AFP/Getty Images

## BREAKING NEWS

The union says it has reached a tentative agreement on wages and will go back to work on Friday until 15 January, when they will return to the bargaining table to negotiate "all other outstanding issues".

BBC News, Los Angeles 4/10/25

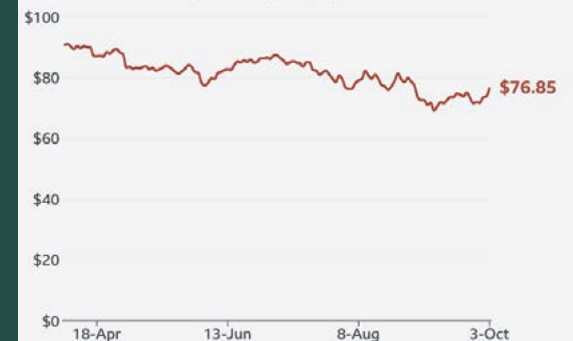
## Global Schedule Reliability



Source: DHL Global forwarding

## Oil prices are now rising

Brent Crude oil cost per barrel, \$US, April to October 2024



Source: Bloomberg



"Middle East tensions could reduce global oil supply causing prices to increase."

- Nick Beer



# SUMMARY

We hope you have found the ideas and commentary useful.

What's clear is, no one size fits all. Keeping close to the trends and identifying how best to adapt and take advantage of the new opportunities will ensure businesses and the sector as a whole thrives.

Innovation and change is crucial to satisfy ever more adventurous and demanding consumers. The way each business adapts, needs to be carefully considered and delivered with excellence.

To support our customers we continue to focus on service, quality and innovation, including maintaining stable supply to our customers amidst continued Global Supply Chain Volatility.

Innovation remains high on the agenda, following the launch of our exciting Sizzling Chargrilled Chicken range and XXL 200g fillets last year, more new lines will be launching in the coming months.

The links to the right take you to our latest range, menu ideas and marketing support. For more information on the report or any other questions, please contact me directly, speak to your account manager or to our customer service team.



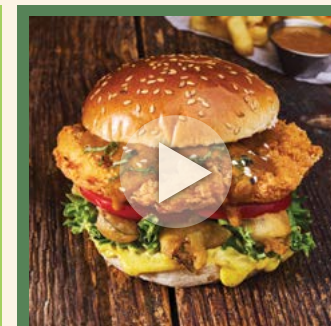
*Nigel O'Donnell*

Nigel O'Donnell  
Managing Director

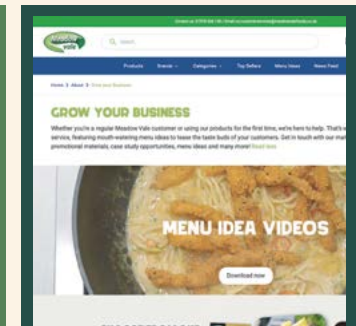
Follow the links below to see our latest Products, Menu Ideas and Marketing Support



Products



Menu Ideas



Marketing Support

**connect**  
your account 24/7

For our wholesale partners, our Connect E-Commerce platform has made ordering faster and more straight forward. If you haven't registered already simply go to [meadowvalefoods.co.uk/sign-in](https://meadowvalefoods.co.uk/sign-in).



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