

# Consumer Foodservice in the US

February 2024

Table of Contents

## Consumer Foodservice in the US

### EXECUTIVE SUMMARY

Consumer foodservice in 2023: The big picture

2023 key trends

Competitive landscape

Independent foodservice developments

What next for consumer foodservice?

### MARKET DATA

Table 1 - Units, Transactions and Value Sales in Consumer Foodservice 2018-2023

Table 2 - Units, Transactions and Value Sales in Consumer Foodservice: % Growth 2018-2023

Table 3 - Consumer Foodservice by Independent vs Chained by Type: Units/Outlets 2023

Table 4 - Consumer Foodservice by Independent vs Chained: % Foodservice Value 2018-2023

Table 5 - Sales in Consumer Foodservice by Food vs Drink Split: % Foodservice Value 2018-2023

Table 6 - Sales in Consumer Foodservice by Food vs Drink Split by Type: % Foodservice Value 2023

Table 7 - Sales in Consumer Foodservice by Location: % Foodservice Value 2018-2023

Table 8 - Sales in Consumer Foodservice by Fulfilment: % Foodservice Value 2018-2023

Table 9 - GBO Company Shares in Chained Consumer Foodservice: % Foodservice Value 2019-2023

Table 10 - GBN Brand Shares in Chained Consumer Foodservice: % Foodservice Value 2020-2023

Table 11 - GBN Brand Shares in Chained Consumer Foodservice: Units/Outlets 2023

Table 12 - Forecast Units, Transactions and Value Sales in Consumer Foodservice 2023-2028

Table 13 - Forecast Units, Transactions and Value Sales in Consumer Foodservice: % Growth 2023-2028

### DISCLAIMER

### SOURCES

Summary 1 - Research Sources

## Cafés/Bars in the US

### KEY DATA FINDINGS

#### 2023 DEVELOPMENTS

Macroeconomic trends continue to have significant influence on cafés/bars

Specialist coffee and tea shops benefits from consumers' return to the office

The golden arches takes aim at customisation

#### PROSPECTS AND OPPORTUNITIES

Social media helps drive interest in experiential models

Drive-through-only coffee locations offer convenience and scalability

AI and automation likely to unlock new potential for cafés/bars in the coming years

### CATEGORY DATA

Table 14 - Cafés/Bars by Category: Units/Outlets 2018-2023

Table 15 - Sales in Cafés/Bars by Category: Number of Transactions 2018-2023

Table 16 - Sales in Cafés/Bars by Category: Foodservice Value 2018-2023

Table 17 - Cafés/Bars by Category: % Units/Outlets Growth 2018-2023

Table 18 - Sales in Cafés/Bars by Category: % Transaction Growth 2018-2023

Table 19 - Sales in Cafés/Bars by Category: % Foodservice Value Growth 2018-2023

Table 20 - GBO Company Shares in Chained Cafés/Bars: % Foodservice Value 2019-2023

Table 21 - GBN Brand Shares in Chained Cafés/Bars: % Foodservice Value 2020-2023

Table 22 - Forecast Cafés/Bars by Category: Units/Outlets 2023-2028

Table 23 - Forecast Sales in Cafés/Bars by Category: Number of Transactions 2023-2028

Table 24 - Forecast Sales in Cafés/Bars by Category: Foodservice Value 2023-2028

Table 25 - Forecast Cafés/Bars by Category: % Units/Outlets Growth 2023-2028

Table 26 - Forecast Sales in Cafés/Bars by Category: % Transaction Growth 2023-2028

Table 27 - Forecast Sales in Cafés/Bars by Category: % Foodservice Value Growth 2023-2028

## Full-Service Restaurants in the US

### KEY DATA FINDINGS

#### 2023 DEVELOPMENTS

Inflation sees consumers dine out at full-service restaurants less often

Special offers can increase traffic, but at what cost?

Consumers are tired of tipping, as the industry and policymakers search for a new tipping standard

### PROSPECTS AND OPPORTUNITIES

Full-service restaurants will increasingly turn to AI and automation for accuracy and efficiency

With no more room to increase prices, restaurant operators will need to look for other ways to improve margins

Brands in full-service restaurants will look to join limited-service brands in innovating in the loyalty space

### CATEGORY DATA

Table 28 - Full-Service Restaurants by Category: Units/Outlets 2018-2023

Table 29 - Sales in Full-Service Restaurants by Category: Number of Transactions 2018-2023

Table 30 - Sales in Full-Service Restaurants by Category: Foodservice Value 2018-2023

Table 31 - Full-Service Restaurants by Category: % Units/Outlets Growth 2018-2023

Table 32 - Sales in Full-Service Restaurants by Category: % Transaction Growth 2018-2023

Table 33 - Sales in Full-Service Restaurants by Category: % Foodservice Value Growth 2018-2023

Table 34 - GBO Company Shares in Chained Full-Service Restaurants: % Foodservice Value 2019-2023

Table 35 - GBN Brand Shares in Chained Full-Service Restaurants: % Foodservice Value 2020-2023

Table 36 - Forecast Full-Service Restaurants by Category: Units/Outlets 2023-2028

Table 37 - Forecast Sales in Full-Service Restaurants by Category: Number of Transactions 2023-2028

Table 38 - Forecast Sales in Full-Service Restaurants by Category: Foodservice Value 2023-2028

Table 39 - Forecast Full-Service Restaurants by Category: % Units/Outlets Growth 2023-2028

Table 40 - Forecast Sales in Full-Service Restaurants by Category: % Transaction Growth 2023-2028

Table 41 - Forecast Sales in Full-Service Restaurants by Category: % Foodservice Value Growth 2023-2028

## Limited-Service Restaurants in the US

### KEY DATA FINDINGS

#### 2023 DEVELOPMENTS

Inflation leads to rises in menu prices and struggles to increase traffic

Growth in pizza limited-service restaurants slows after dynamic pandemic period

Brands in limited-service restaurants look to grow in additional dayparts

### PROSPECTS AND OPPORTUNITIES

Brands look to compete through outlet expansion

Loyalty programmes – more important than ever for value-hungry consumers

The broader effect of the California fast food minimum wage increase

### CATEGORY DATA

Table 42 - Limited-Service Restaurants by Category: Units/Outlets 2018-2023

Table 43 - Sales in Limited-Service Restaurants by Category: Number of Transactions 2018-2023

Table 44 - Sales in Limited-Service Restaurants by Category: Foodservice Value 2018-2023

Table 45 - Limited-Service Restaurants by Category: % Units/Outlets Growth 2018-2023

Table 46 - Sales in Limited-Service Restaurants by Category: % Transaction Growth 2018-2023

Table 47 - Sales in Limited-Service Restaurants by Category: % Foodservice Value Growth 2018-2023

Table 48 - GBO Company Shares in Chained Limited-Service Restaurants: % Foodservice Value 2019-2023

Table 49 - GBN Brand Shares in Chained Limited-Service Restaurants: % Foodservice Value 2020-2023

Table 50 - Forecast Limited-Service Restaurants by Category: Units/Outlets 2023-2028

Table 51 - Forecast Sales in Limited-Service Restaurants by Category: Number of Transactions 2023-2028

Table 52 - Forecast Sales in Limited-Service Restaurants by Category: Foodservice Value 2023-2028

Table 53 - Forecast Limited-Service Restaurants by Category: % Units/Outlets Growth 2023-2028

Table 54 - Forecast Sales in Limited-Service Restaurants by Category: % Transaction Growth 2023-2028

Table 55 - Forecast Sales in Limited-Service Restaurants by Category: % Foodservice Value Growth 2023-2028

## Self-Service Cafeterias in the US

### KEY DATA FINDINGS

#### 2023 DEVELOPMENTS

Continued rebound from COVID-19 decline

IKEA holds steady on outlet numbers, defying the general trend

Inflation spike provides extra emphasis on value for money

#### PROSPECTS AND OPPORTUNITIES

Value proposition remains important as consumers adjust to higher costs

Exploring new and exciting flavours and quality

Outlet decline highlights challenges in self-service cafeterias

#### CATEGORY DATA

Table 56 - Self-Service Cafeterias: Units/Outlets 2018-2023

Table 57 - Sales in Self-Service Cafeterias: Number of Transactions 2018-2023

Table 58 - Sales in Self-Service Cafeterias: Foodservice Value 2018-2023

Table 59 - Sales in Self-Service Cafeterias: % Units/Outlets Growth 2018-2023

Table 60 - Sales in Self-Service Cafeterias: % Transaction Growth 2018-2023

Table 61 - Sales in Self-Service Cafeterias: % Foodservice Value Growth 2018-2023

Table 62 - GBO Company Shares in Chained Self-Service Cafeterias: % Foodservice Value 2019-2023

Table 63 - GBN Brand Shares in Chained Self-Service Cafeterias: % Foodservice Value 2020-2023

Table 64 - Forecast Self-Service Cafeterias: Units/Outlets 2023-2028

Table 65 - Forecast Sales in Self-Service Cafeterias: Number of Transactions 2023-2028

Table 66 - Forecast Sales in Self-Service Cafeterias: Foodservice Value 2023-2028

Table 67 - Forecast Self-Service Cafeterias: % Units/Outlets Growth 2023-2028

Table 68 - Forecast Sales in Self-Service Cafeterias: % Transaction Growth 2023-2028

Table 69 - Forecast Sales in Self-Service Cafeterias: % Foodservice Value Growth 2023-2028

## Consumer Foodservice By Location in the US

### KEY DATA FINDINGS

#### 2023 DEVELOPMENTS

Continued growth of drive-through encourages the opening of stand-alone locations

Fans return to dining at sports stadiums, leading to opportunities for concession operators

Grocery retailers meet consumers' demand for convenience, value and experiences in foodservice offerings

#### PROSPECTS AND OPPORTUNITIES

Convenience stores are moving foodservice to the forefront

Rural, suburban and smaller city markets are becoming increasingly attractive to consumer foodservice chains

#### CATEGORY DATA

Table 70 - Consumer Foodservice by Location: Units/Outlets 2018-2023

Table 71 - Sales in Consumer Foodservice by Location: Number of Transactions 2018-2023

Table 72 - Sales in Consumer Foodservice by Location: Foodservice Value 2018-2023

Table 73 - Consumer Foodservice by Location: % Units/Outlets Growth 2018-2023

Table 74 - Sales in Consumer Foodservice by Location: % Transaction Growth 2018-2023

Table 75 - Sales in Consumer Foodservice by Location: % Foodservice Value Growth 2018-2023

Table 76 - Consumer Foodservice through Standalone: Units/Outlets 2018-2023

Table 77 - Sales in Consumer Foodservice through Standalone: Number of Transactions 2018-2023

Table 78 - Sales in Consumer Foodservice through Standalone: Foodservice Value 2018-2023

Table 79 - Consumer Foodservice through Standalone: % Units/Outlets Growth 2018-2023

Table 80 - Sales in Consumer Foodservice through Standalone: % Transaction Growth 2018-2023

Table 81 - Sales in Consumer Foodservice through Standalone: % Foodservice Value Growth 2018-2023

Table 82 - Consumer Foodservice through Leisure: Units/Outlets 2018-2023

Table 83 - Sales in Consumer Foodservice through Leisure: Number of Transactions 2018-2023

Table 84 - Sales in Consumer Foodservice through Leisure: Foodservice Value 2018-2023

Table 85 - Consumer Foodservice through Leisure: % Units/Outlets Growth 2018-2023

Table 86 - Sales in Consumer Foodservice through Leisure: % Transaction Growth 2018-2023

Table 87 - Sales in Consumer Foodservice through Leisure: % Foodservice Value Growth 2018-2023

Table 88 - Consumer Foodservice through Retail: Units/Outlets 2018-2023

Table 89 - Sales in Consumer Foodservice through Retail: Number of Transactions 2018-2023

Table 90 - Sales in Consumer Foodservice through Retail: Foodservice Value 2018-2023

Table 91 - Consumer Foodservice through Retail: % Units/Outlets Growth 2018-2023

Table 92 - Sales in Consumer Foodservice through Retail: % Transaction Growth 2018-2023

Table 93 - Sales in Consumer Foodservice through Retail: % Foodservice Value Growth 2018-2023

Table 94 - Consumer Foodservice through Lodging: Units/Outlets 2018-2023

Table 95 - Sales in Consumer Foodservice through Lodging: Number of Transactions 2018-2023

Table 96 - Sales in Consumer Foodservice through Lodging: Foodservice Value 2018-2023

Table 97 - Consumer Foodservice through Lodging: % Units/Outlets Growth 2018-2023

Table 98 - Sales in Consumer Foodservice through Lodging: % Transaction Growth 2018-2023

Table 99 - Sales in Consumer Foodservice through Lodging: % Foodservice Value Growth 2018-2023

Table 100 - Consumer Foodservice through Travel: Units/Outlets 2018-2023

Table 101 - Sales in Consumer Foodservice through Travel: Number of Transactions 2018-2023

Table 102 - Sales in Consumer Foodservice through Travel: Foodservice Value 2018-2023

Table 103 - Consumer Foodservice through Travel: % Units/Outlets Growth 2018-2023

Table 104 - Sales in Consumer Foodservice through Travel: % Transaction Growth 2018-2023

Table 105 - Sales in Consumer Foodservice through Travel: % Foodservice Value Growth 2018-2023

Table 106 - Forecast Consumer Foodservice by Location: Units/Outlets 2023-2028

Table 107 - Forecast Sales in Consumer Foodservice by Location: Number of Transactions 2023-2028

Table 108 - Forecast Sales in Consumer Foodservice by Location: Foodservice Value 2023-2028

Table 109 - Forecast Consumer Foodservice by Location: % Units/Outlets Growth 2023-2028

Table 110 - Forecast Sales in Consumer Foodservice by Location: % Transaction Growth 2023-2028

Table 111 - Forecast Sales in Consumer Foodservice by Location: % Foodservice Value Growth 2023-2028

Table 112 - Forecast Consumer Foodservice through Standalone: Units/Outlets 2023-2028

Table 113 - Forecast Sales in Consumer Foodservice through Standalone: Number of Transactions 2023-2028

Table 114 - Forecast Sales in Consumer Foodservice through Standalone: Foodservice Value 2023-2028

Table 115 - Forecast Consumer Foodservice through Standalone: % Units/Outlets Growth 2023-2028

Table 116 - Forecast Sales in Consumer Foodservice through Standalone: % Transaction Growth 2023-2028

Table 117 - Forecast Sales in Consumer Foodservice through Standalone: % Foodservice Value Growth 2023-2028

Table 118 - Forecast Consumer Foodservice through Leisure: Units/Outlets 2023-2028

Table 119 - Forecast Sales in Consumer Foodservice through Leisure: Number of Transactions 2023-2028

Table 120 - Forecast Sales in Consumer Foodservice through Leisure: Foodservice Value 2023-2028

Table 121 - Forecast Consumer Foodservice through Leisure: % Units/Outlets Growth 2023-2028

Table 122 - Forecast Sales in Consumer Foodservice through Leisure: % Transaction Growth 2023-2028

Table 123 - Forecast Sales in Consumer Foodservice through Leisure: % Foodservice Value Growth 2023-2028

Table 124 - Forecast Consumer Foodservice through Retail: Units/Outlets 2023-2028

Table 125 - Forecast Sales in Consumer Foodservice through Retail: Number of Transactions 2023-2028

Table 126 - Forecast Sales in Consumer Foodservice through Retail: Foodservice Value 2023-2028

Table 127 - Forecast Consumer Foodservice through Retail: % Units/Outlets Growth 2023-2028

Table 128 - Forecast Sales in Consumer Foodservice through Retail: % Transaction Growth 2023-2028

Table 129 - Forecast Sales in Consumer Foodservice through Retail: % Foodservice Value Growth 2023-2028

Table 130 - Forecast Consumer Foodservice through Lodging: Units/Outlets 2023-2028

Table 131 - Forecast Sales in Consumer Foodservice through Lodging: Number of Transactions 2023-2028

Table 132 - Forecast Sales in Consumer Foodservice through Lodging: Foodservice Value 2023-2028

Table 133 - Forecast Consumer Foodservice through Lodging: % Units/Outlets Growth 2023-2028

Table 134 - Forecast Sales in Consumer Foodservice through Lodging: % Transaction Growth 2023-2028

Table 135 - Forecast Sales in Consumer Foodservice through Lodging: % Foodservice Value Growth 2023-2028

Table 136 - Forecast Consumer Foodservice through Travel: Units/Outlets 2023-2028

Table 137 - Forecast Sales in Consumer Foodservice through Travel: Number of Transactions 2023-2028

Table 138 - Forecast Sales in Consumer Foodservice through Travel: Foodservice Value 2023-2028

Table 139 - Forecast Consumer Foodservice through Travel: % Units/Outlets Growth 2023-2028

Table 140 - Forecast Sales in Consumer Foodservice through Travel: % Transaction Growth 2023-2028

Table 141 - Forecast Sales in Consumer Foodservice through Travel: % Foodservice Value Growth 2023-2028

## About Euromonitor International

Euromonitor International is an independent market intelligence provider. Data, insight and analysis stem from in-the-field research spanning 210 national markets.

Content ranges from the in-depth and country-specific, to key strategic themes with a global range and significance. Products cover a comprehensive range of insights and market data, but can be broadly categorised as:

- **Strategy Briefings:** Global or regional in scope, and focussing on the most important themes shaping consumer demand, the key markets, competitive environment and future outlook across a range of industries.
- **Company Profiles:** Analysis dedicated to the world's most significant companies, with detailed insight into their activities, focus of operations, their competitors, their geographic presence and performance.
- **Country Reports:** For an in-depth understanding of specific countries, whether by industry, economic metrics or consumer trends and lifestyles. These reports cover current trends, consumer demand, market potential and future prospects, with country-specific local insight and comprehensive data, unavailable elsewhere.

For more information on this report, further enquiries can be directed via this link [www.euromonitor.com/consumer-foodservice-in-the-us/report](https://www.euromonitor.com/consumer-foodservice-in-the-us/report).