



Trends in foodservice, food-to-go and retail and implications for Irish meat

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FOOD
FUTURES
INSIGHTS

The current landscape



1 Cost pressures rising across ingredients and labour

Differentiated experiences valued more than ever by consumers

2

3 Healthier concepts growing, as are a range of latest generation QSRs

Continuing shift in locations – and more focus on travel sites

4

5 Reestablishment of more normal trading conditions?

Key shifts under way

1

Technology is a key route to reduce labour - but it shouldn't be at the expense of customer service

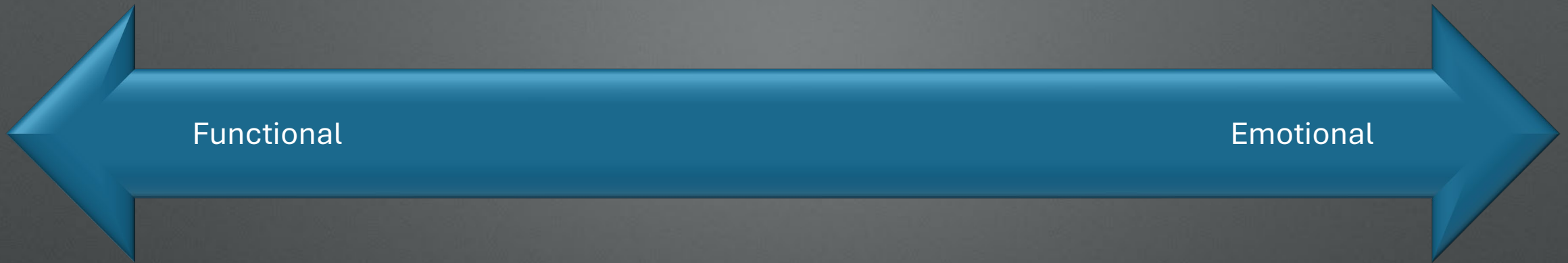
2

Consumers are having to make tougher choices - value vs. experiential polarisation

3

Rising costs will impact menu/ range choice – ingredient versatility becomes more important

From a food-to-go and foodservice perspective, the experiential side is showing capacity for growth...



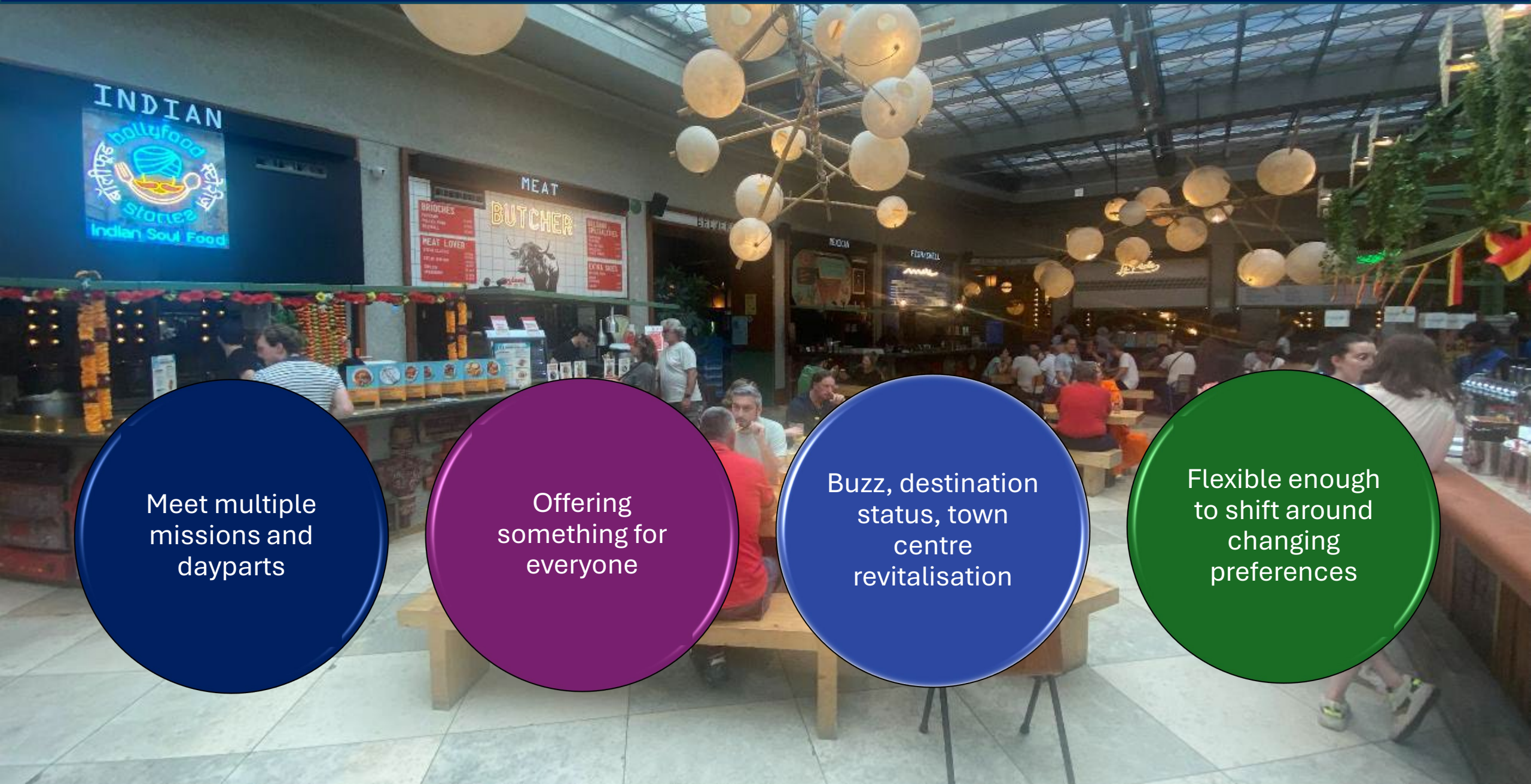
Productive fuelling

Treating

Social fuelling

Experiential

The rising influence of food halls



Meet multiple
missions and
dayparts

Offering
something for
everyone

Buzz, destination
status, town
centre
revitalisation

Flexible enough
to shift around
changing
preferences

Not just about the latest global cuisines



Some retailers looking
directly at how to
incorporate foodhall
thinking into concepts



Mercado Gonzalez by Northgate Markets, Costa Mesa, CA

The fresh-led supermarket as a counterweight to value

Grand Frais, France



Sainsbury's aiming to deliver on convenience, experience and value

Only grocer to launch Aldi Price Match in Convenience



Breakfast, lunch and dinner favourites, price matched to Aldi

Sainsbury's
Good food for all of us

- Now live in **>800 convenience stores**
- Offer covers a range of up to **200 of the products that customers buy most often**



Rebalancing space towards food



More of the **right range & propositions** accessible to more customers



Simple and frictionless shopping missions



Connecting customers to our **brand and value**



Leading **digital capabilities** driving greater relevancy & profitability



Sainsbury's, Witney, UK



...while Marks & Spencer aims to combine this with a mission-focus

While most retailers are reducing costs, labour and counters, some are going the other way



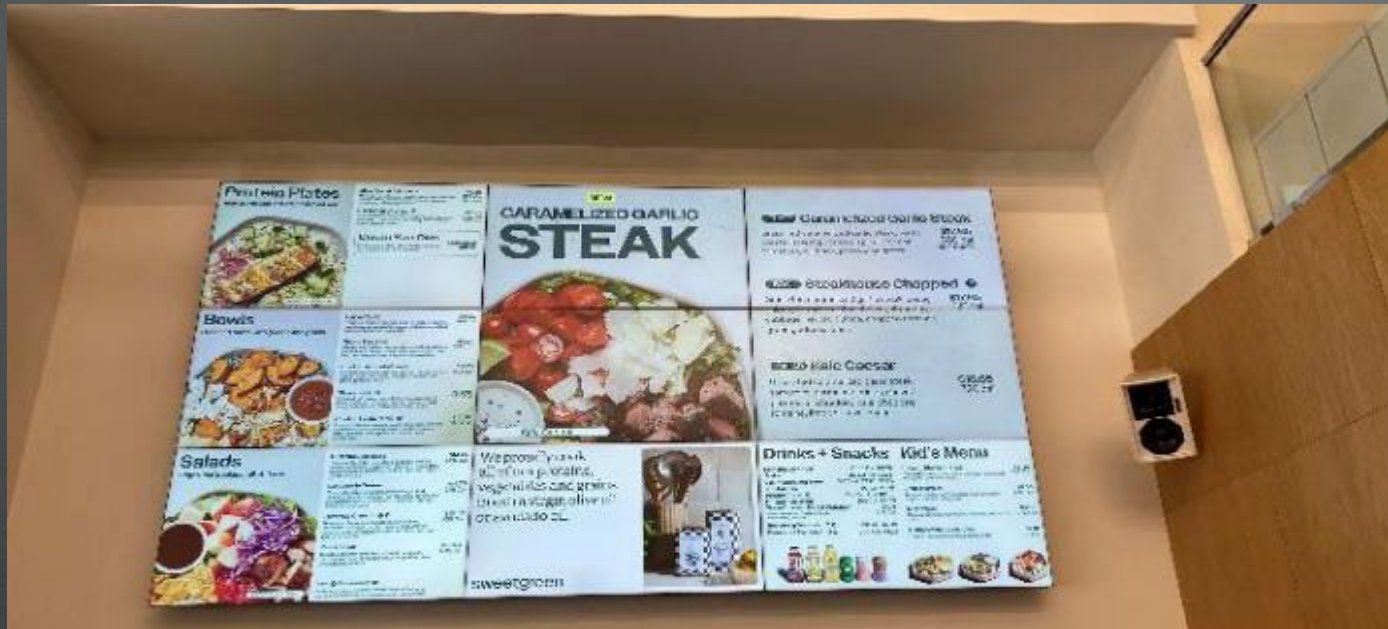




Food-to-go in London: increasingly marked by the expansion of healthier specialists



Inspired by the likes of Sweetgreen in the US, which itself is continually evolving



Sweetgreen

As is its competitor set...



Cava

Big Mamma Group, France, UK & Spain

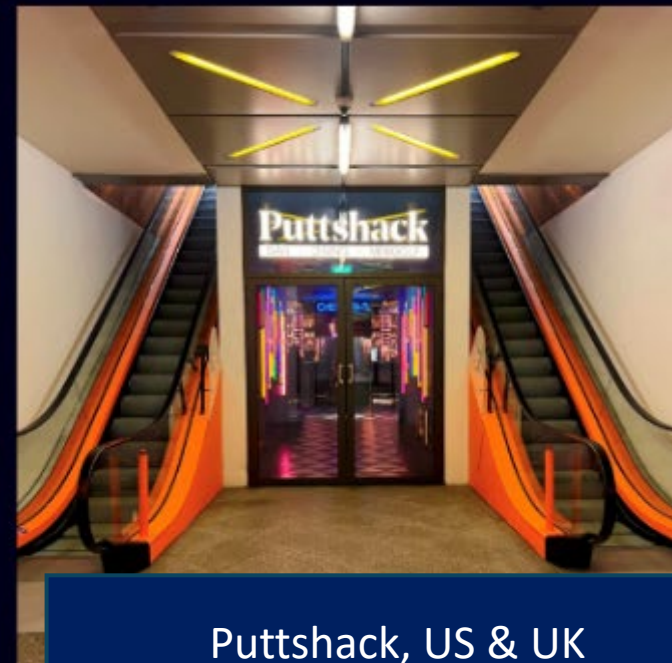


Increased focus
on experience in
eating out
- environment
upgrades



Alberts Schloss, UK

Increased focus
on experience in
eating out
- the rise of
competitive
socialising



Puttshack, US & UK



A growing focus
on covering
more day parts...



QSRs in Europe- Wingstop and Popeyes expanding at pace, but what's next?





Not Irish or Mexican, but O'Tacos is creating its own positioning in the QSR market in France and beyond



Delicious £1 Meal Deal.

Until 31 Jan.

MAIN + SNACK + DRINK

MEAL
DEAL

£3.90

£1



Communicating value for money is key for many missions
in the current climate....



In the UK, several food-to-go operators price core dishes excluding protein to keep entry price points lower

Hitzberger in Switzerland does this on a self-serve basis to enable personalisation and upsell...





Convenience – continuing format evolution





A focus on improving forecourt food-to-go propositions





Technology at the heart of supermarkets' continuing evolution



Retail range review

Track your range effectiveness



Range score

66%

Summary of Subsection Scores:

- **Cleanliness**: 7/10
- **Product Accessibility**: 7/10
- **Shelf Standards**: 7/10
- **Stock Levels**: 6/10
- **Promotions/Signage**: 7/10
- **Pricing Clarity**: 8/10
- **Product Visibility**: 6/10
- **Key FTG Items**: 7/10
- **Location Suitability**: 8/10
- **Shopability**: 7/10
- **Health Focus**: 5/10
- **Key Products in Ranges**: 7/10

Commercial Sales Opportunities:

- **Plain Water Bottles**: Significant sales loss potential due to lack of plain water, which is a critical FTG item. Potential uplift: **+15-20 units/day**.
- **Side-On Product Display (3rd Shelf)**: Reduced visibility impacting sales of this range. Improving this could boost sales by **+5-10%** for impacted products.

A significant back end role for technology in supermarkets

AI Use Case for Restaurants

AI for Enhanced Customer Experience



- Help Guests Select Meals
- Providing Unique Menus For Each Customer
- Chatbots & Virtual Assistants
- Personalized Marketing



AI Uses Cases in the Front of the Restaurant Premises

- Answer Customers Call
- Voice Ordering

AI Use Cases in Restaurant Operations



- Smart Inventory and Optimizer Supply Usages
- Predictive Maintenance
- Automating Recipe Management & Digitizing Coaching Cooks
- Staff Scheduling —Assisting Waitstaff



AI Use Cases for Back of the Restaurants Premises

- Data-based Insights & Predictions
- Content (Text, Image, Video) Creation



... Back end is where most of the use case is in foodservice/ food-to-go



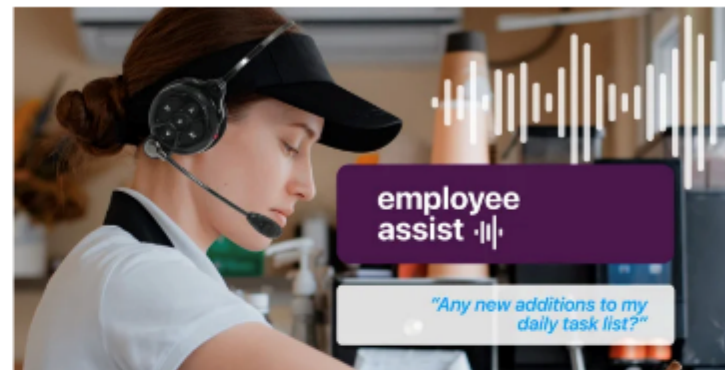
THE
STANDARD SPOTLIGHTS
**FUTURISTIC
RESTAURANT
SERVES FOOD
WITH NO
HUMANS
INVOLVED**

employee assist

Employee Assist is a category-defining voice AI technology that allows restaurant employees from both the front and back of the house to ask a custom-trained voice assistant critical questions – and get instant responses – completely hands-free.

Easily accessible via a headset or tablet, this groundbreaking product uses SoundHound's voice AI with generative AI capabilities to learn and understand instruction manuals, ingredient and allergen information, and more. It then relays knowledge directly to employees via their headsets as part of a fluid two-way conversation, with the system able to answer a question (and follow-up questions). It's like having an expert on the ear of every employee.

[Watch demo](#)



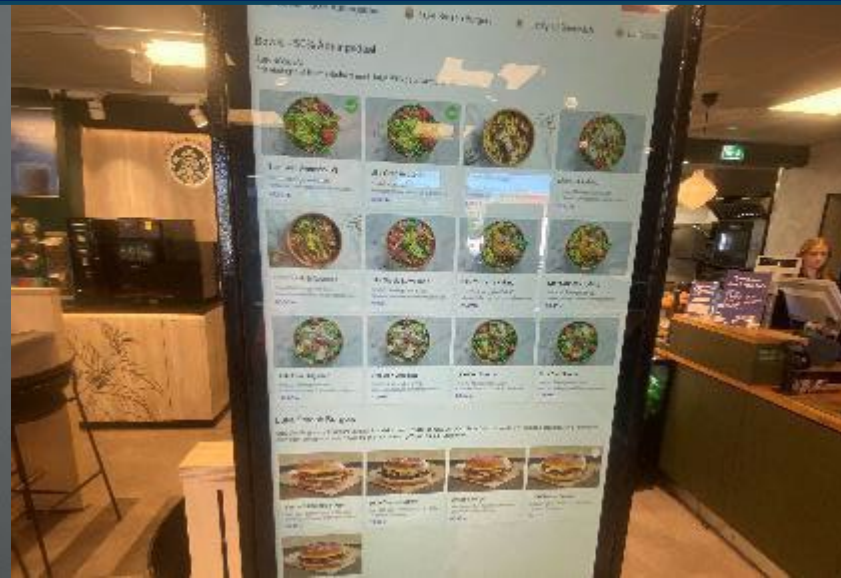
SoundHound +



**White Castle + SoundHound:
Scaling Voice AI In The Drive Thru**

It's being tested in different cases....

And tech in the smart kitchen is bringing better food and meal options are coming to more locations



The future: driving efficiencies in labour heavy concepts...



Channel outlook...

Retailers are focusing on meeting more missions

Meal solutions

Fresh credentials

Value

1

Convenience & forecourts looking to upgrade, but mindful of cost & waste

2

Food-to-go specialists – lots going on, innovation in targeting customers groups & missions

3

QSRs – a new wave coming through, especially around chicken

4

Restaurants – heading more experiential and thinking more about day part coverage

5

Food halls – growing and getting more sophisticated

6

Competitive socialising – becoming bigger, with opportunities for better food...

7

To conclude

1

Natural, healthy and sustainable lies at the heart of many current success stories – build on this where you can

2

Labour will only get more expensive – how can you make great finished products easier to prepare/ serve?

3

Consider convenience – not just the raw protein or the ready meal, but consider solutions in between (meal kits & components)



Thanks for listening!

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