



Self-Service Cafeterias in the US

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Self-Service Cafeterias in the US - Category analysis

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2025 DEVELOPMENTS

Self-service cafeterias: Navigating economic volatility through scale and value

INDUSTRY PERFORMANCE

Consumers are looking for safety, value and convenience

Self-service cafeterias are particularly susceptible to spoilage and ingredient shifts – chained operators outperform

Self-service cafeterias push the bounds of value offerings

WHAT'S NEXT?

Self-service cafeterias reliant on core consumer groups to extend their lifespan

Self-service cafeterias reliant on adjacency and smart placement more than others

Sustainability practices will remain important even as messaging dies off

COMPETITIVE LANDSCAPE

Golden Corral dominates due to a lack of strong competition

Chained self-service cafeterias continues to perform best amidst turbulence

Value offering not enough for regional brands in many cases, consolidation a possible outcome

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Consumer Foodservice in the US - Industry Overview

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Macroeconomic and policy disruptions reshape consumer foodservice

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INDUSTRY PERFORMANCE

Navigating operational volatility and the premiumisation of value

Brands adapt to capture value-conscious diners demanding convenience

Loyalty programmes and experiences connect with customers in a price-sensitive world

WHAT'S NEXT?

Challenges abound, but US consumers still love to eat

The legacy of GLP-1

Sustainability and health policy shifts

COMPETITIVE LANDSCAPE

The golden arches remain important in consumer foodservice in the US

Dutch Bros continues to see the winds blow in its favour

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Delivery is automating to try and overcome human sentiment about delivery fees

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