



Passport

Self-Service Cafeterias in the US

Euromonitor International

February 2024

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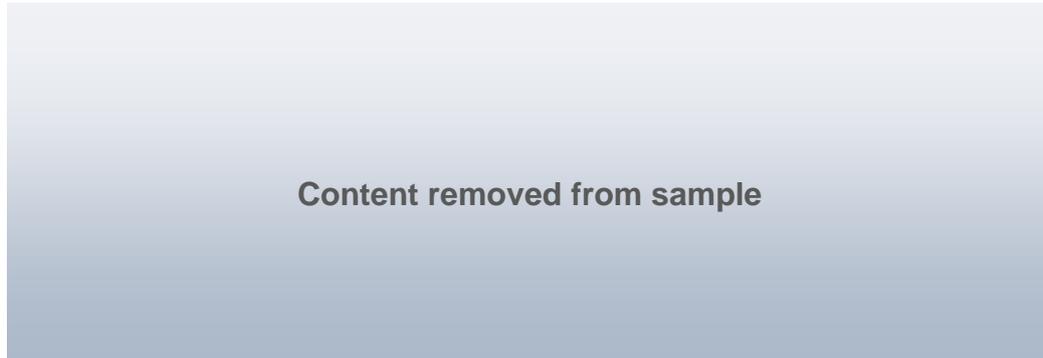
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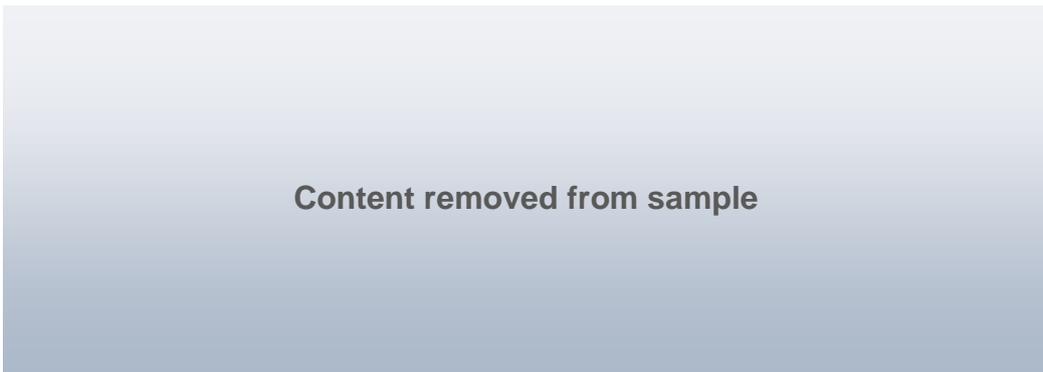
SELF-SERVICE CAFETERIAS IN THE US - CATEGORY ANALYSIS

KEY DATA FINDINGS

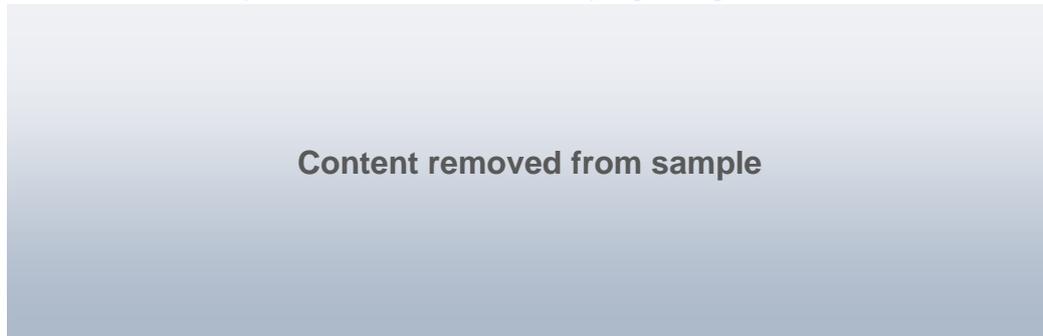


2023 DEVELOPMENTS

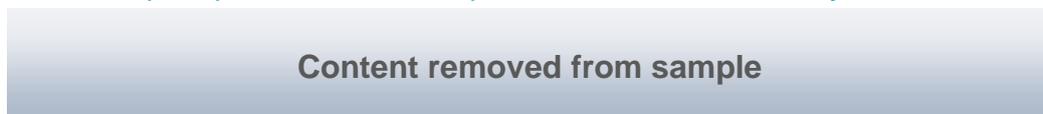
Continued rebound from covid-19 decline



Ikea holds steady on outlet numbers, defying the general trend



Inflation spike provides extra emphasis on value for money



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PROSPECTS AND OPPORTUNITIES

Value proposition remains important as consumers adjust to higher costs

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Exploring new and exciting flavours and quality

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Outlet decline highlights challenges in self-service cafeterias

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CATEGORY DATA

Table 1 Self-Service Cafeterias: Units/Outlets 2018-2023

outlets	2018	2019	2020	2021	2022	2023
Self-Service Cafeterias - Chained Self-Service Cafeterias - Independent Self-Service Cafeterias	Data removed from sample					

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 2 Sales in Self-Service Cafeterias: Number of Transactions 2018-2023

'000 transactions	2018	2019	2020	2021	2022	2023
Self-Service Cafeterias - Chained Self-Service Cafeterias - Independent Self-Service Cafeterias	Data removed from sample					

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 3 Sales in Self-Service Cafeterias: Foodservice Value 2018-2023

USD million	2018	2019	2020	2021	2022	2023

Self-Service Cafeterias
 - Chained Self-Service Cafeterias
 - Independent Self-Service Cafeterias

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 4 Sales in Self-Service Cafeterias: % Units/Outlets Growth 2018-2023

% Units/Outlets growth	2022/23	2018-23 CAGR	2018/23 Total
Self-Service Cafeterias - Chained Self-Service Cafeterias - Independent Self-Service Cafeterias	Data removed from sample		

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 5 Sales in Self-Service Cafeterias: % Transaction Growth 2018-2023

% transaction growth	2022/23	2018-23 CAGR	2018/23 Total
Self-Service Cafeterias - Chained Self-Service Cafeterias - Independent Self-Service Cafeterias	Data removed from sample		

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 6 Sales in Self-Service Cafeterias: % Foodservice Value Growth 2018-2023

% value growth	2022/23	2018-23 CAGR	2018/23 Total
Self-Service Cafeterias - Chained Self-Service Cafeterias - Independent Self-Service Cafeterias	Data removed from sample		

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 7 GBO Company Shares in Chained Self-Service Cafeterias: % Foodservice Value 2019-2023

% value Company	2019	2020	2021	2022	2023
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Data removed from sample

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 8 GBN Brand Shares in Chained Self-Service Cafeterias: % Foodservice Value 2020-2023

% value Brand	Global Brand Owner	2020	2021	2022	2023
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Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 9 Forecast Self-Service Cafeterias: Units/Outlets 2023-2028

outlets	2023	2024	2025	2026	2027	2028
---------	------	------	------	------	------	------

Self-Service Cafeterias	Data removed from sample					
- Chained Self-Service Cafeterias						
- Independent Self-Service Cafeterias						

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 10 Forecast Sales in Self-Service Cafeterias: Number of Transactions 2023-2028

'000 transactions	2023	2024	2025	2026	2027	2028
-------------------	------	------	------	------	------	------

Self-Service Cafeterias	Data removed from sample					
- Chained Self-Service Cafeterias						
- Independent Self-Service Cafeterias						

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 11 Forecast Sales in Self-Service Cafeterias: Foodservice Value 2023-2028

USD million	2023	2024	2025	2026	2027	2028
Self-Service Cafeterias - Chained Self-Service Cafeterias - Independent Self-Service Cafeterias	Data removed from sample					

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 12 Forecast Self-Service Cafeterias: % Units/Outlets Growth 2023-2028

% Units/Outlets growth	2023/2024	2023-28 CAGR	2023/28 Total
Self-Service Cafeterias - Chained Self-Service Cafeterias - Independent Self-Service Cafeterias	Data removed from sample		

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 13 Forecast Sales in Self-Service Cafeterias: % Transaction Growth 2023-2028

% transaction growth	2023/2024	2023-28 CAGR	2023/28 Total
Self-Service Cafeterias - Chained Self-Service Cafeterias - Independent Self-Service Cafeterias	Data removed from sample		

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 14 Forecast Sales in Self-Service Cafeterias: % Foodservice Value Growth 2023-2028

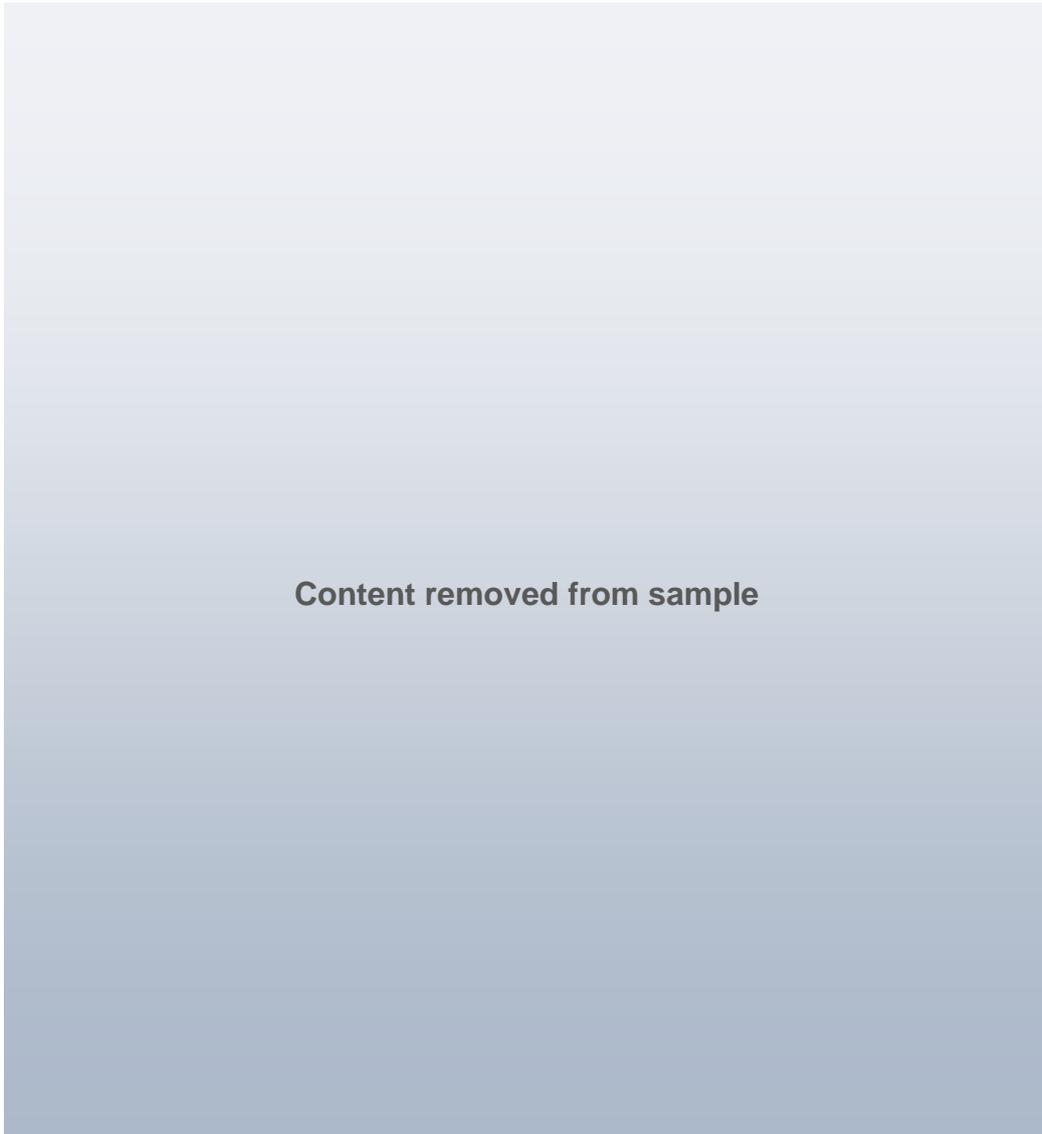
% value growth	2023/2024	2023-28 CAGR	2023/28 Total
Self-Service Cafeterias - Chained Self-Service Cafeterias - Independent Self-Service Cafeterias	Data removed from sample		

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

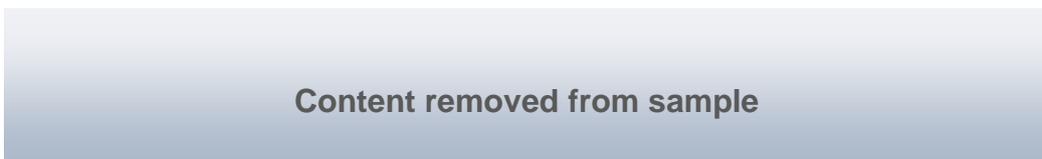
CONSUMER FOODSERVICE IN THE US - INDUSTRY OVERVIEW

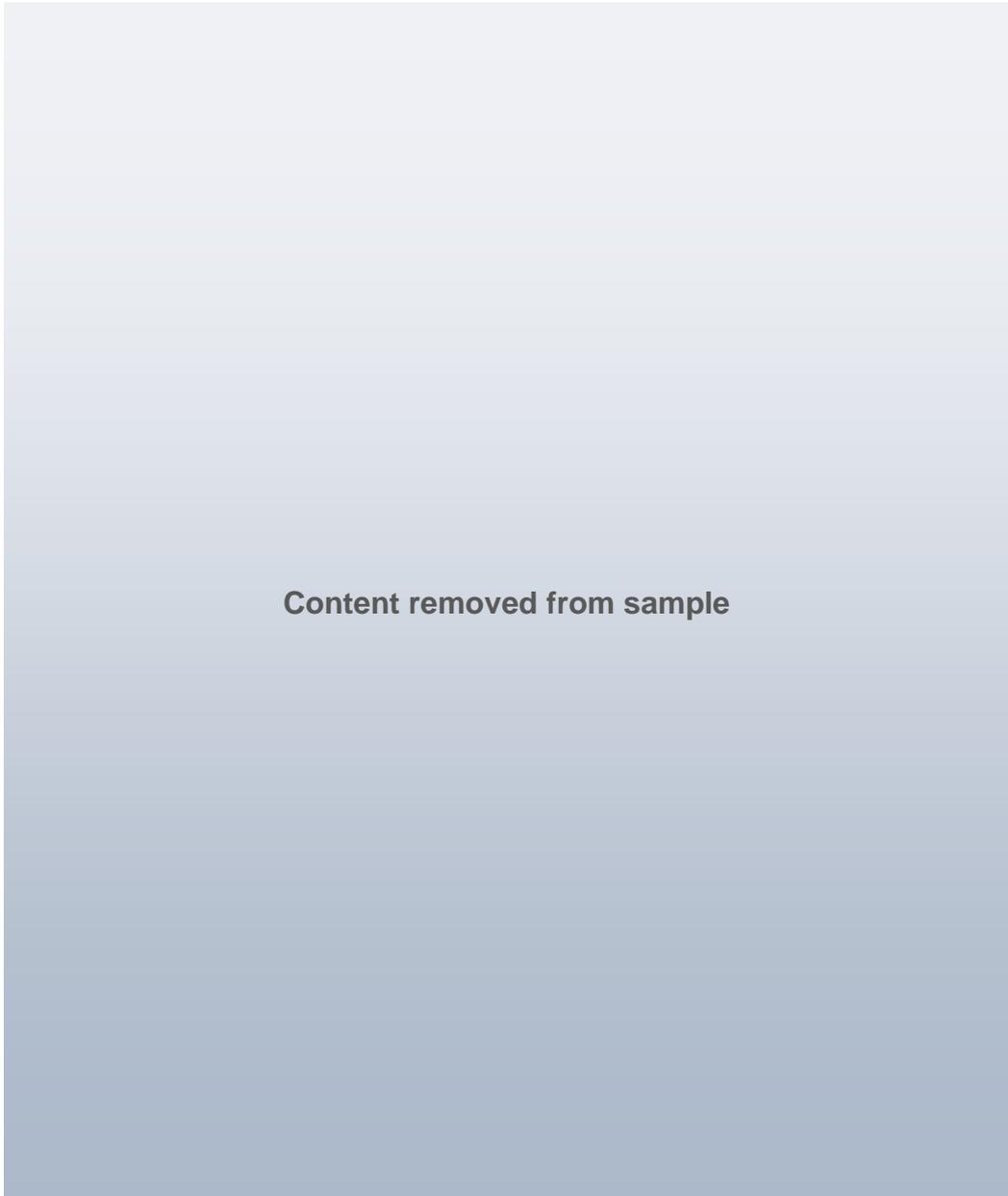
EXECUTIVE SUMMARY

Consumer foodservice in 2023: The big picture

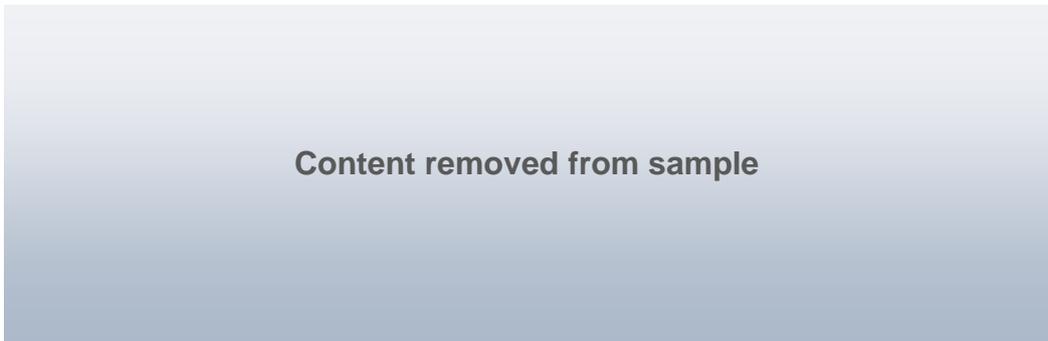


2023 key trends





Competitive landscape



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Independent foodservice developments

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What next for consumer foodservice?

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MARKET DATA

Table 15 Units, Transactions and Value Sales in Consumer Foodservice 2018-2023

	2018	2019	2020	2021	2022	2023
Units	Data removed from sample					
Transactions (mn)						
USD million current prices						
USD million constant prices						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 16 Units, Transactions and Value Sales in Consumer Foodservice: % Growth 2018-2023

% growth	2022/23	2018-23 CAGR	2018/23 Total
Units	Data removed from sample		
Transactions			
Value current prices			
Value constant prices			

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 17 Consumer Foodservice by Independent vs Chained by Type: Units/Outlets 2023

outlets	Independent	Chained	Total
Consumer Foodservice by Type	Data removed from sample		
Cafés/Bars			
Full-Service Restaurants			
Limited-Service Restaurants			
Self-Service Cafeterias			
Street Stalls/Kiosks			

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 18 Consumer Foodservice by Independent vs Chained: % Foodservice Value 2018-2023

% value	2018	2019	2020	2021	2022	2023
Chained Foodservice	Data removed from sample					
Independent Foodservice						
Total						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 19 Sales in Consumer Foodservice by Food vs Drink Split: % Foodservice Value 2018-2023

% value	2018	2019	2020	2021	2022	2023
Food	Data removed from sample					
Drink						
Total						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 20 Sales in Consumer Foodservice by Food vs Drink Split by Type: % Foodservice Value 2023

% value analysis	Food	Drink	Total
Consumer Foodservice by Type	Data removed from sample		
Cafés/Bars			
Full-Service Restaurants			
Limited-Service Restaurants			
Self-Service Cafeterias			
Street Stalls/Kiosks			

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 21 Sales in Consumer Foodservice by Location: % Foodservice Value 2018-2023

% value	2018	2019	2020	2021	2022	2023
Stand-Alone	Data removed from sample					
Retail						
Travel						
Leisure						
Lodging						
Total						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 22 Sales in Consumer Foodservice by Fulfillment: Foodservice Value 2018-2023

USD million	2018	2019	2020	2021	2022	2023
Consumer Foodservice by Fulfillment	Data removed from sample					
Takeaway						
Delivery						
Drive-Through						

Eat-In

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 23 Sales in Consumer Foodservice by Fulfillment: % Foodservice Value Growth 2018-2023

% value growth	2022/23	2018-23 CAGR	2018/23 Total
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Consumer Foodservice by Fulfillment
 Takeaway
 Delivery
 Drive-Through
 Eat-In

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 24 GBO Company Shares in Chained Consumer Foodservice: % Foodservice Value 2019-2023

% value Company	2019	2020	2021	2022	2023
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Data removed from sample

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 25 GBN Brand Shares in Chained Consumer Foodservice: % Foodservice Value 2020-2023

% value Brand	Global Brand Owner	2020	2021	2022	2023
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Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 26 GBN Brand Shares in Chained Consumer Foodservice: Units/Outlets 2023

Brand Global Brand Owner outlets

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 27 Forecast Units, Transactions and Value Sales in Consumer Foodservice 2023-2028

	2023	2024	2025	2026	2027	2028
Units	Data removed from sample					
Transactions (mn)						
USD million						

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 28 Forecast Units, Transactions and Value Sales in Consumer Foodservice: % Growth 2023-2028

% growth	2023/24	2023-28 CAGR	2023/28 Total
Units	Data removed from sample		
Transactions			

Constant value

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Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

DISCLAIMER

Forecast closing date: 5 February 2024

Report closing date: 13 February 2024

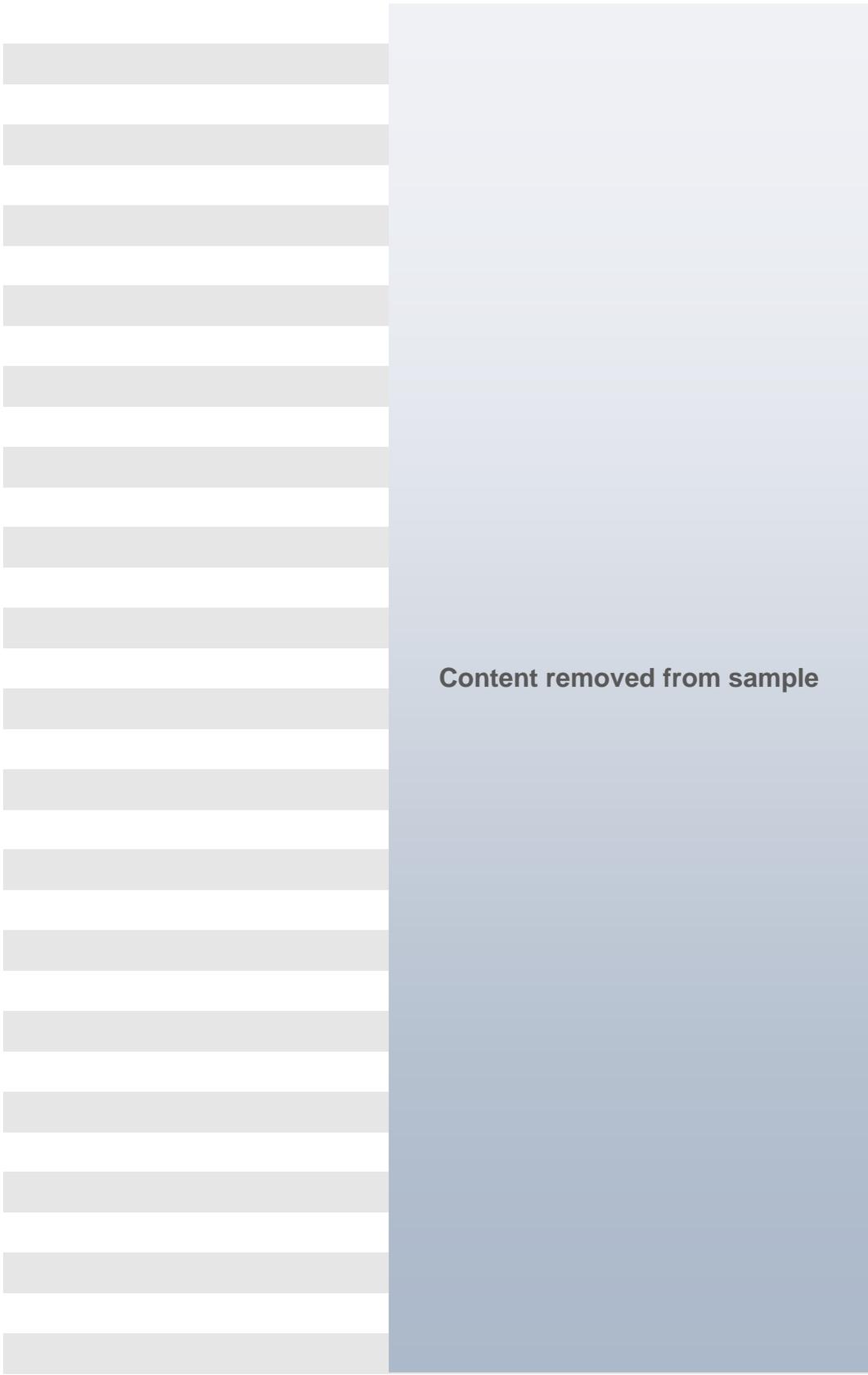
Analysis and data in this report give full consideration to consumer behaviour and market performance in 2023 and beyond as of the dates above. For the very latest insight on this industry and consumer behaviour, at both global and national level, readers can access strategic analysis and updates on www.euromonitor.com and via the Passport system, where new content is being added on a systematic basis.

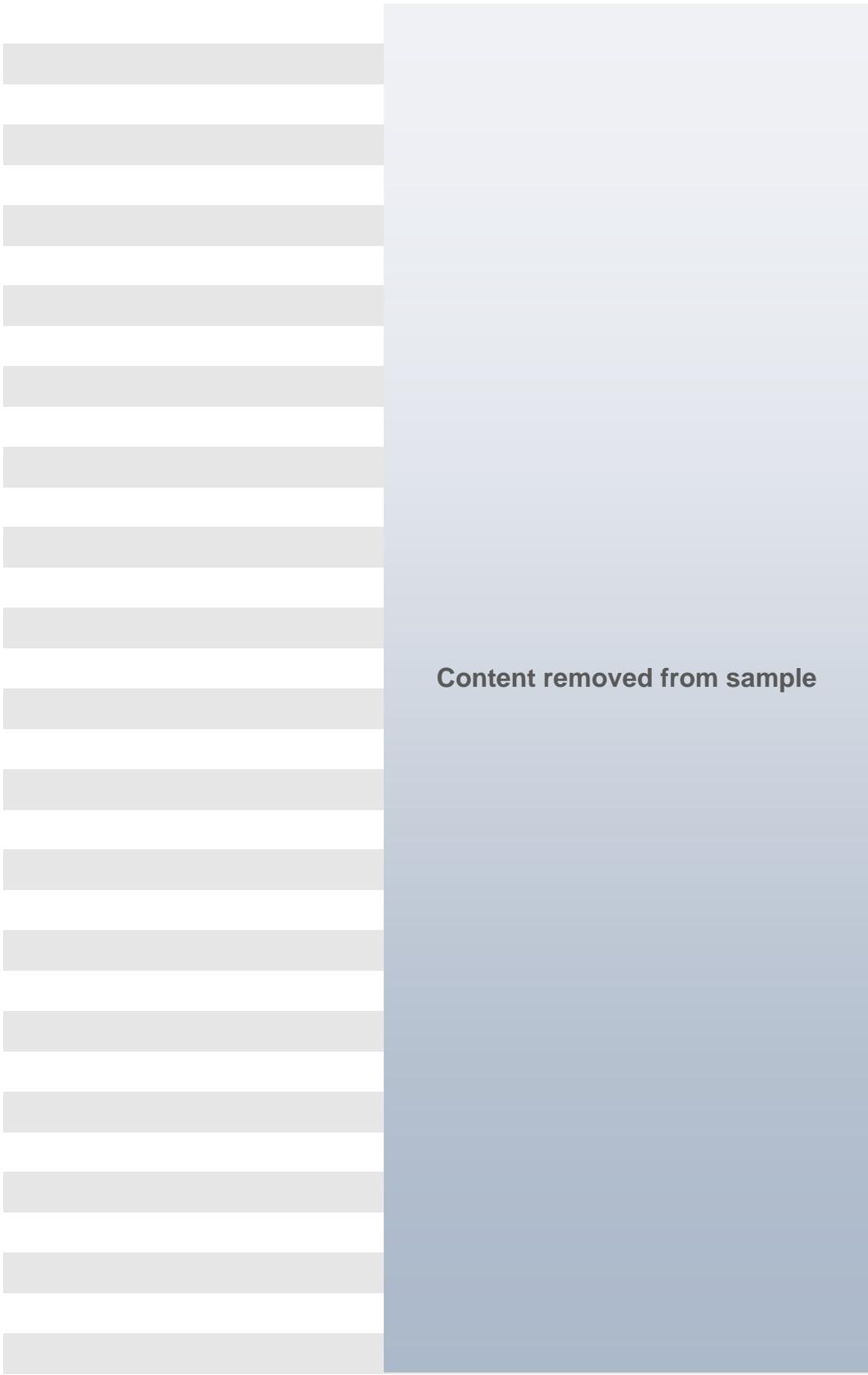
SOURCES

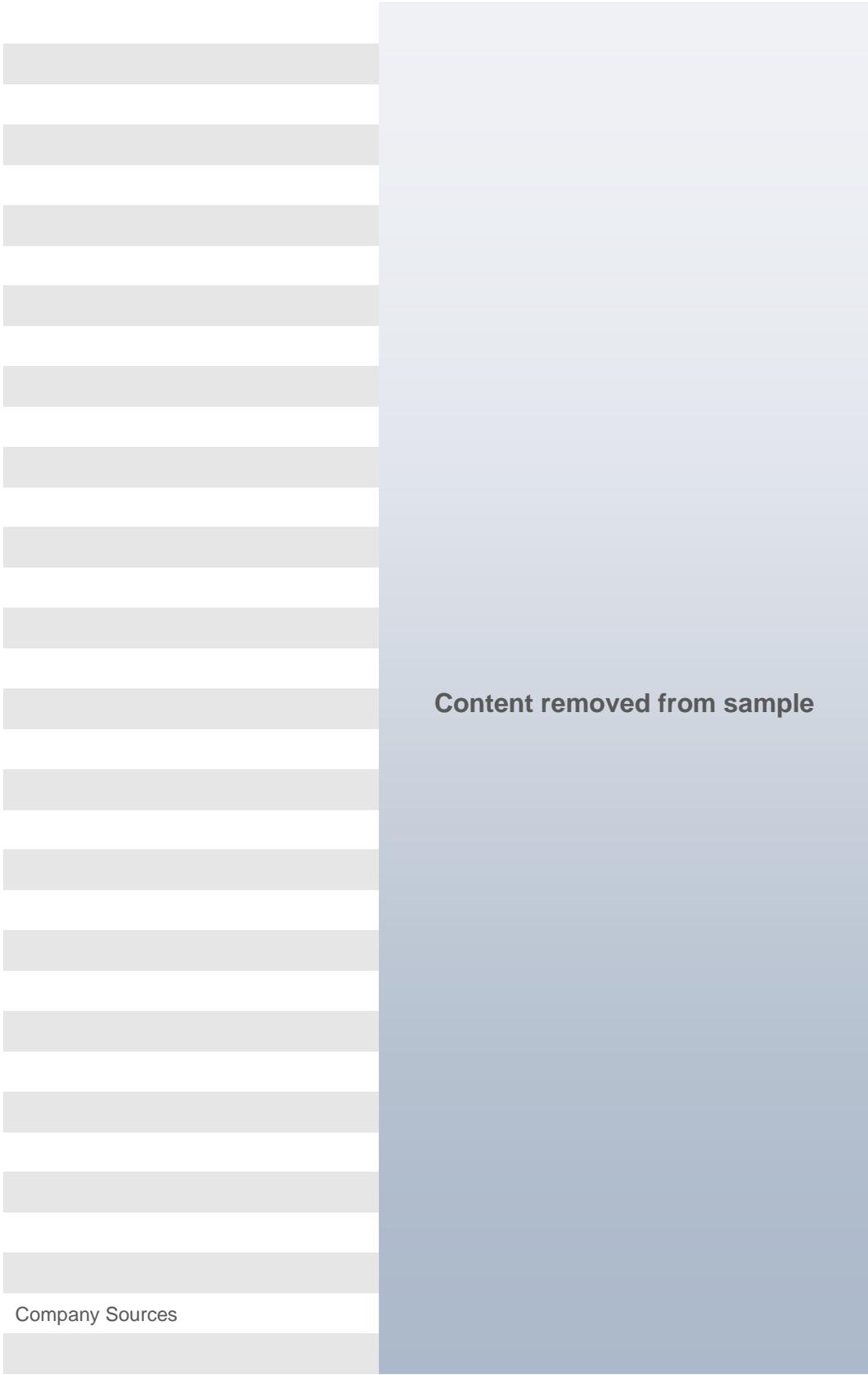
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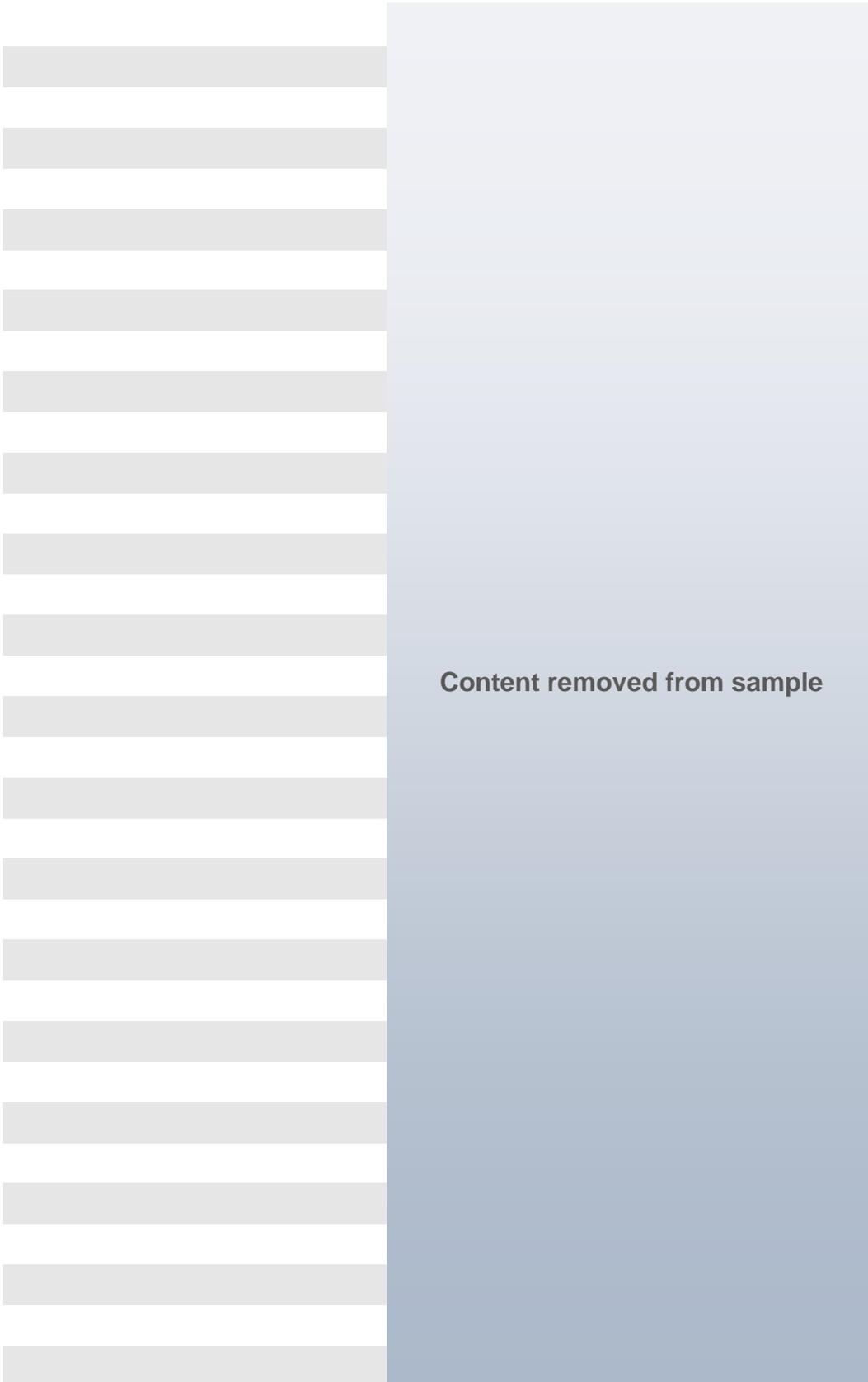
Summary 1 Research Sources

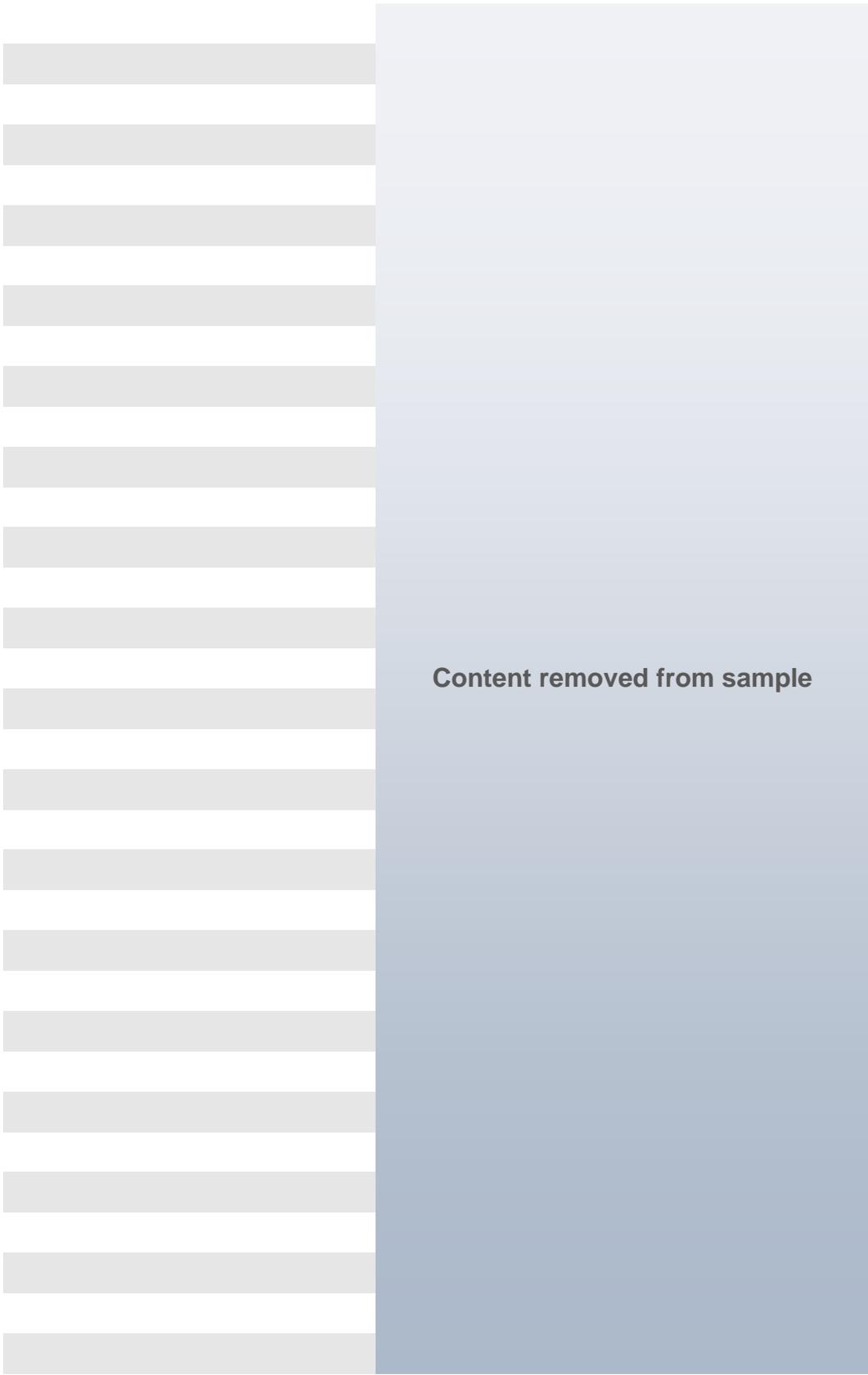
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Trade Press	

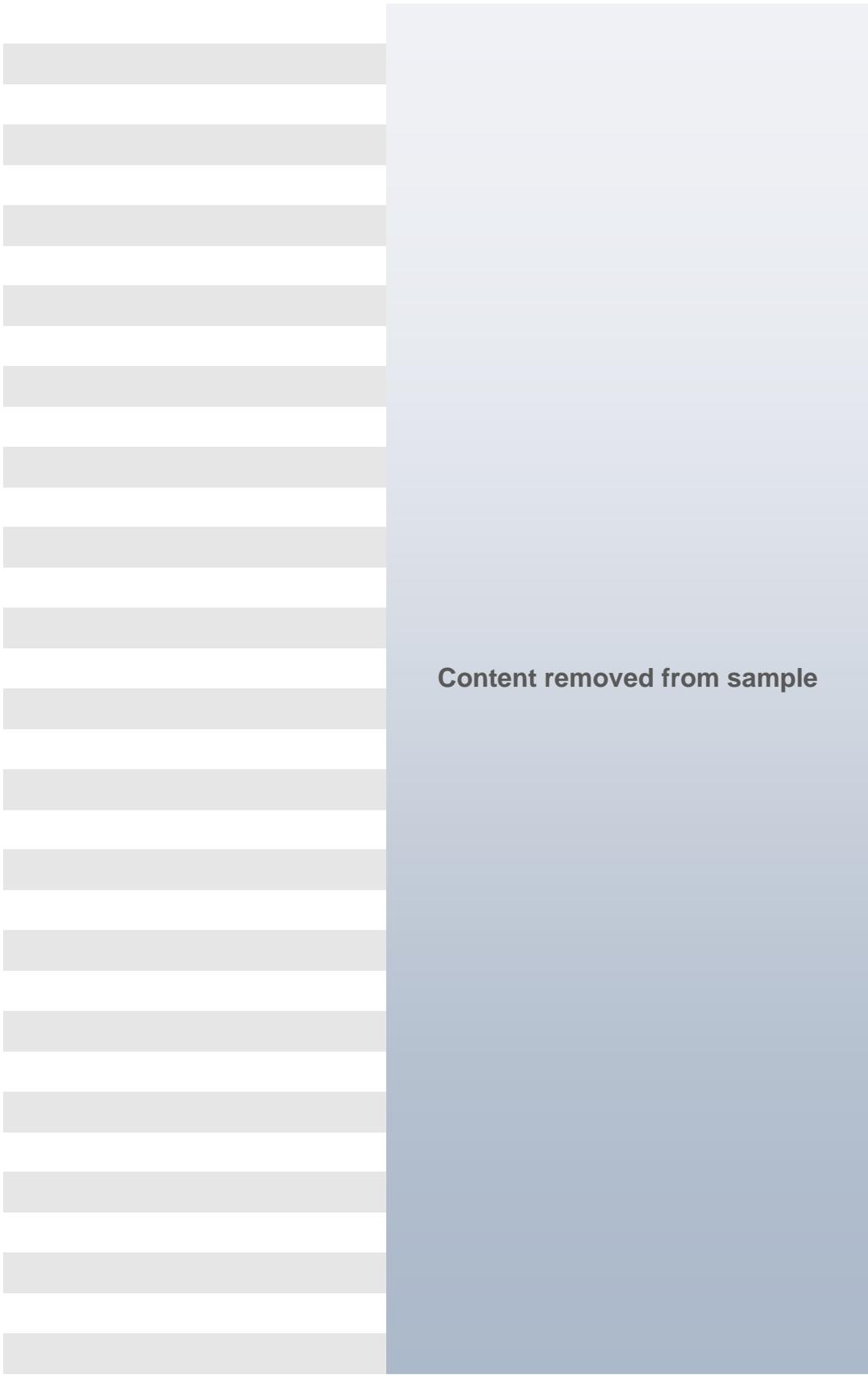


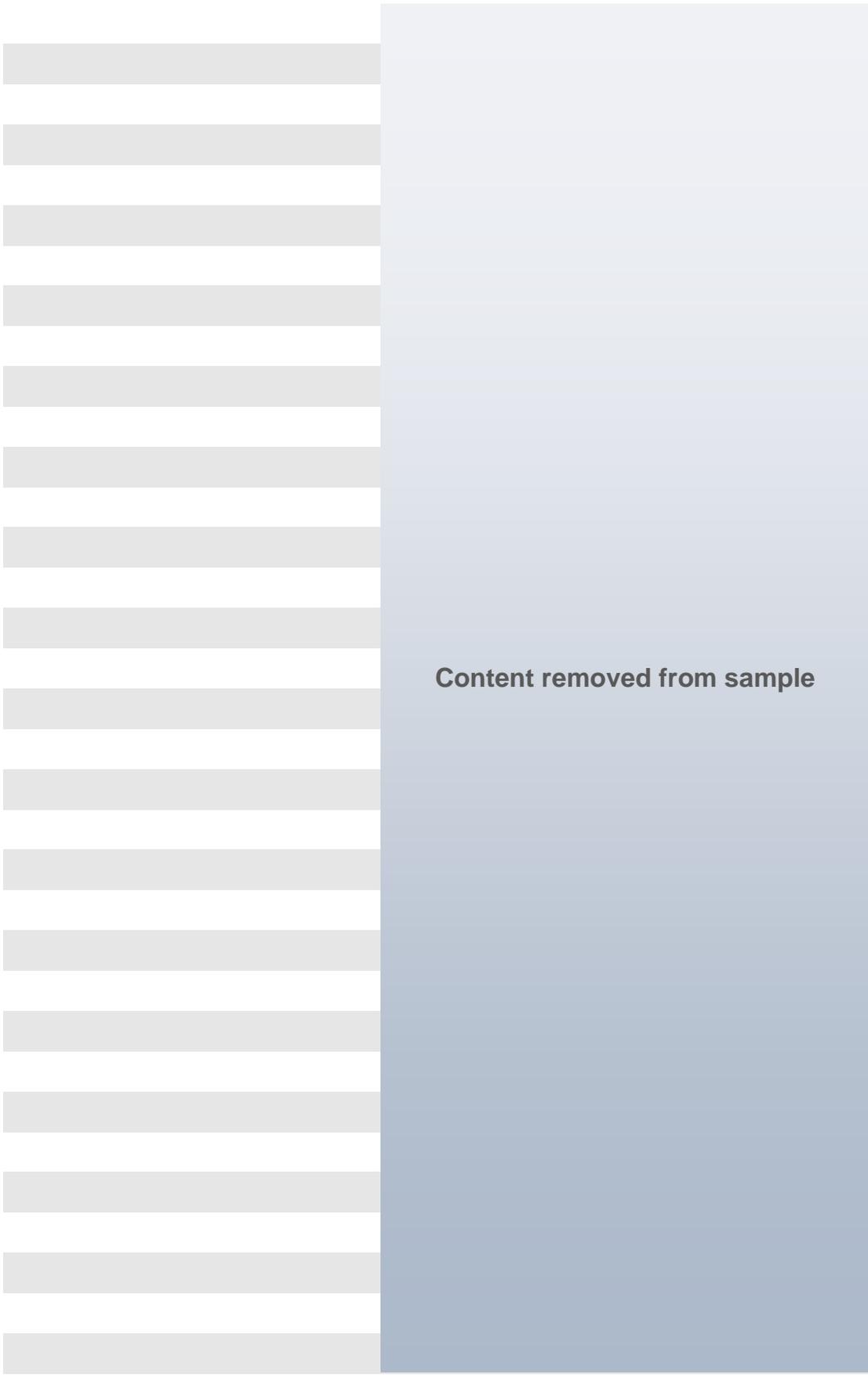


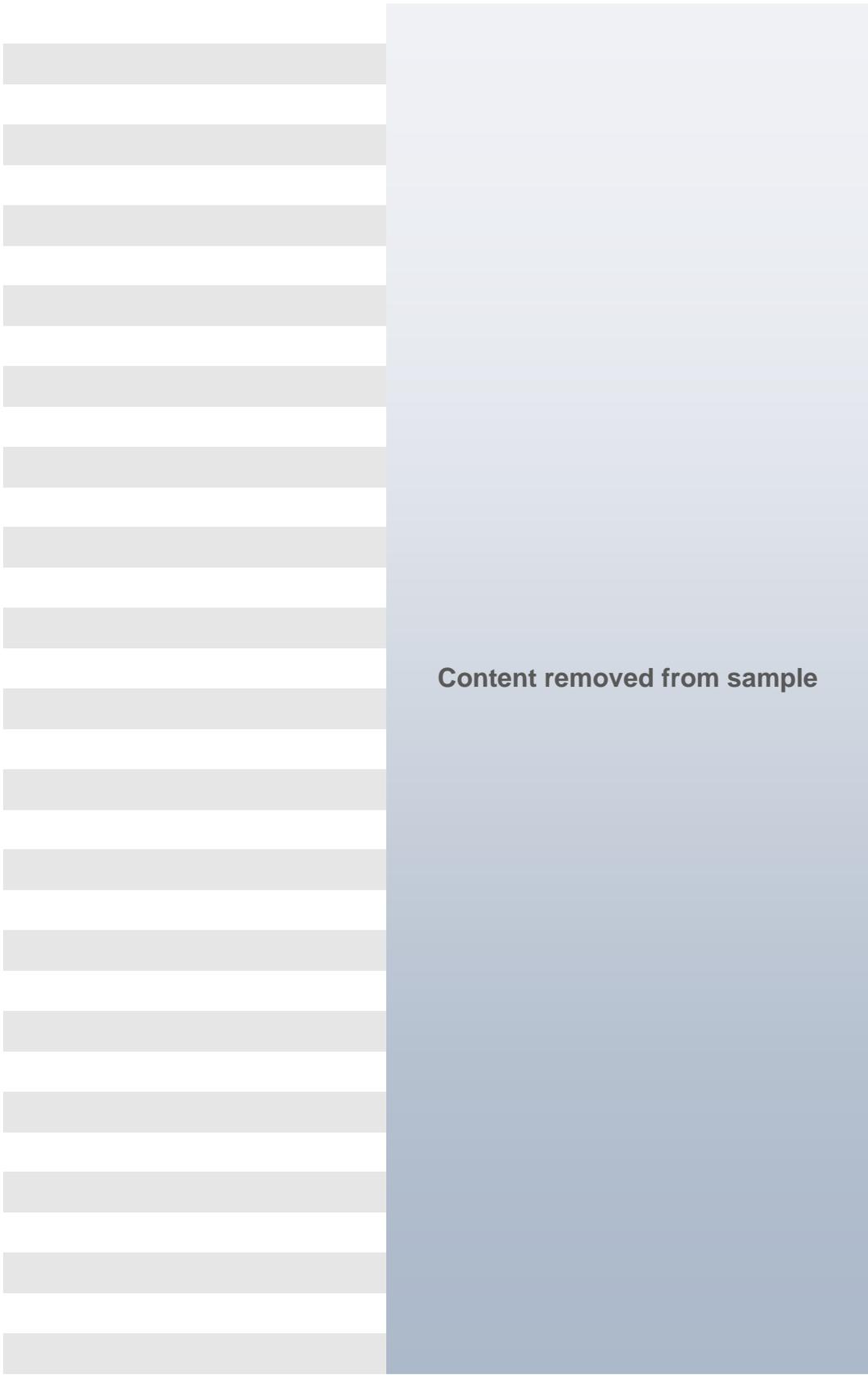


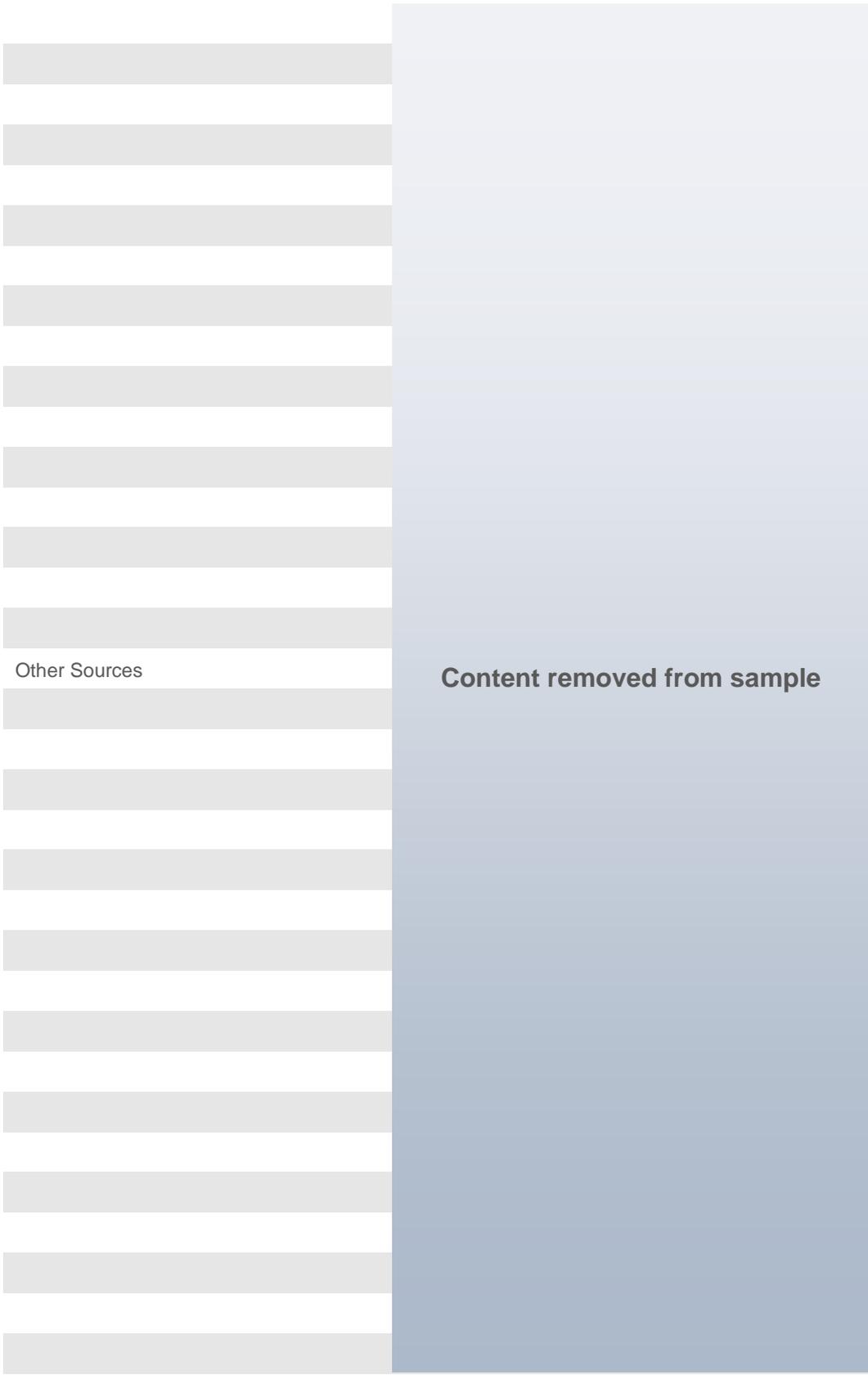














Source: Euromonitor International