



SAVOUR THE KRUMB - THE INDUSTRY GO-TO FOR FOODSERVICE INSIGHTS



The Krumb.

Out of Home Trends
& Foodie Flavours



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Kara
FOODSERVICE BAKERS

Sensible Sustainability

Consumers continue to engage with sustainability, now expecting operators to play their part.

They expect operators to **adopt food waste reduction initiatives** and responsible sourcing methods.

Consumers favour venues that **demonstrate transparency and a commitment to sustainability** by publishing the credentials on their menus.

This shift is putting pressure on operators to **integrate environmentally conscious practices** into their operations to remain competitive.



What actions would you like pubs and restaurants to take to become more environmentally friendly? (Top 4)



Composting food waste.



58%



Reducing single-use plastics by offering reusable or biodegradable alternatives.



50%



Offering organic, fair-trade, and sustainably sourced food and beverages.



44%



Using renewable energy sources like solar panels.



43%

Operators have been placing greater emphasis on low waste credentials as well as transparency regarding both carbon emissions and produce sourcing and they're shouting about it.

Some operators are using regeneratively farmed products on their menus which will lower their carbon footprint, whilst others such as hotel operators, are reducing food waste by reusing buffet leftovers and turning them into delicious dishes and placing them on the evening menu.

Elevated Bakery

Pubs & Bars.

Burgers and pizzas are each growing share of pub & bar main options. These dishes tend to be easily customisable and can be adapted for dietary requirements. More recently, operators have been elevating these dishes with trend-led toppings and more premium ingredients.

Mexican, Korean and American are key influences of some revitalised burger menus. Many branded restaurants are also adding the inclusion of branded products such as Frank's Red Hot Original Sauce, stretching the quality credentials of the range.

*Mexican Chilli Burger
served on Kara Gourmet
Seeded Brioche*



Coffee & Sandwich Shops.

Retail, coffee and sandwich shop operators are successfully tapping into elevated trends through quality propositions and offering premium ranges, helping to drive growth of drink-only occasions.

Sandwiches are getting a revamp. Consumers are enticed by next level on-the-go options, such as hot premium sandwiches in elevated carriers, crusty baguettes, and traditional burger buns. This menu innovation provides a fusion of flavours, quality ingredients and seasonal LTOs.



Pub & Bar share of main dish type, Spring/Summer 2023-2024

Dish	SS 24 Share	Growth vs 2023
 Burger	24.9%	+1.9ppts
 Pizza	11.8%	+2.7ppts

Veg Please

Shares of consumers who are flexitarian, vegetarian and vegan have stagnated this year (30%, 6%, 1%), through fears around the negative effects of meat alternative products.

This year operators switch their focuses to vegetarian and vegan dishes that have a stronger focus on vegetables. The positive power that comes naturally from plants is only growing in importance for consumers.

Operators across the breadth of the market are introducing plant-based dishes where vegetables are the hero.



Veg-first focus boosted in 2024, aligned with consumer preferences towards whole foods and attitudes around faux meat options shifting amid fears of ultra-processing. In recent years, operators have had to fine-tune their formulations of plant-based food and drink to be simple, flavourful and nutritious - simply by having 'cleaner back-of-packs', and we expect to see more of this in 2025 and beyond.

73% of UK adults agree eating a wide variety of plant products (e.g. fruit, veg, seeds) is important to support general health



Brioche Style Bun Range



Best Seller



Value for Money

Cost of living continues to attract consumers to reward and loyalty schemes.

With cost-of-living pressures continuing to strain household finances in the past few years this has prompted increased value scrutiny.

Consumers are now shifting their priorities, opting for more intentional purchases which focus less on price alone and more on overall perceived value.

Value for money is increasingly driving consumer venue choices. 26% of decisions around where to eat or drink is driven around an operators perceived value for money credentials. Shifting priorities indicate that consumers are now making more intentional purchases, focusing less on price alone and more on overall perceived value.



75% of customers describe themselves as being value led

Trend Development Highlights.

Reward Schemes.

Many consumers are favouring operators offering reward schemes which aid in them seeking immediate gratification. In fact, Consumers prioritise ease of redemption when considering a reward scheme. Gone are the schemes offering seven stamps and then a free hot beverage. Consumers are now expecting consumer-centric benefits such as a free meal every Tuesday or gamified rewards, including a 'spin the wheel' game to unlock special discounts, freebies and competition entries.

Operators must continue to offer immediate rewards to entice consumers as value for money satisfaction ratings increased by +2.2% when consumers use a percentage-off promotion.

Premium Meal Deals.

Ages 18-24 were the age demographic that has become more value conscious, growing 2% YoY. This age demographic is also returning to the market as consumer confidence increases.

Many operators are pushing good quality products with reasonable price points. Sandwiches are getting more elevated with deeper fillings and big flavour profiles but come with an affordable price tag. We are also seeing more premium meal deals now being more widely available.

87% of consumers prioritise ease of redemption when considering a reward scheme



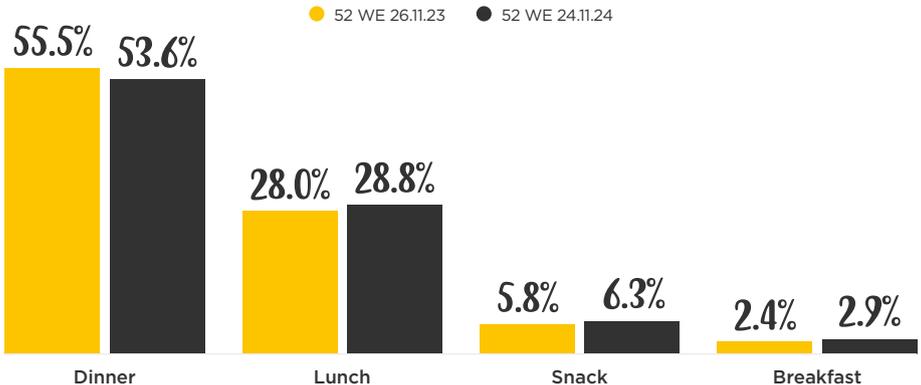
Widening Dayparts

Breakfast drives growth as operators look to extend ranges and their own trading hours to tap into this lucrative day-part, especially the QSR sector. Breakfast is a key focus for many brands as it looks to capture on-the-go consumers seeking variety and those returning to habitual meal occasions before work.

For QSR, the breakfast segment represents a growth opportunity for operators as consumer morning routines have normalised and also the reduced pressure on finances boosts appeal. Many operators are now expanding their breakfast ranges to include English muffins, wraps, breakfast burgers and more, all within a value price point.



QSR share of occasions by day part, 52 WE 24.11.24



Snacking dayparts continue to rise, with the return of millennials to the market.

This demographic tends to be more open to exploring new flavours but also enjoys socialising, especially with partners and work colleagues.

The return of the work social is something that is evident in the widening of dayparts, as snacking occasions increase to 10% in coffee and sandwich shops. Plus many operators are expanding into hot food-to-go, such as chicken strips, hot wedges, and pizza slices for workers to take with them on the way to their pub of choice.



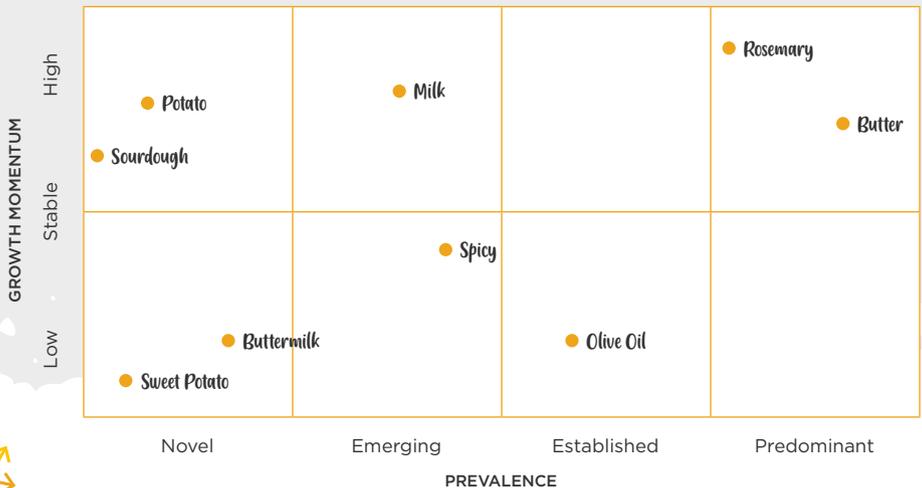
**UK eating/drinking out market
25-34s - Occasion Type - Year-on-year 52 WE**

Occasion	2023	2024
 After work drinks	10%	12.9%

Growing Flavour Profiles in Bakery - UK 2024



The flavour maturity landscape uses advanced data analytics to show you the market at a glance. Flavours on the left of the landscape are niche while those on the right are dominant. Flavours near the top are growing in prevalence, while those near the bottom are shrinking but entering new formats.



Food Trends & Flavours

Smores.

Smores are an iconic and nostalgic campfire treat and we're increasingly seeing them enter the kitchen. Whether its stuffed, baked into breads or morphed into different shapes, they're set to take pride of place on dessert menus.

Pistachio.

The small green nut is being used as a flavouring in beverages and pastries, as well as an ingredient on food menus. Packed full of fibre it is seen to bring many health benefits. Not to mention, the viral 'Dubai Chocolate' of pistachio and kataifi pastry is becoming increasingly popular on social media menus.

Cherry.

Cherries are set to trend this summer across the culinary world as well as pop culture. Many operators will be using cherry jams in burgers or including them in pastries.



Texas Toast.

Everything is big in Texas and the toast phenomenon entering the fried chicken space is now bigger than ever! Introducing Texas toast: a thick slice of white bread served buttered and grilled. It has been gracing menus across America and is now entering the UK space!

Luck of the Irish.

Irish spice bags are currently a popular street food style dish across Ireland. The cuisine is growing globally with operators also incorporating Irish stout Guinness into a brownie dessert, following an explosion of popularity for the beverage.



Pizza Sandwich.

Tapping into street food trends, pizzas are becoming new sandwich carriers, whether that is twisted, folded, fried or filled, they're set to be a major trend this summer.



Pipelchuma.

Consumers have become more adventurous with cuisines and cooking leading to a rise of global flavours and ingredients. Spices including turmeric, harissa and miso have become popular. Pipelchuma, a Libyan chilli paste, is set to be the next big popular flavouring within this trend, appealing to the increasingly aspirational consumers who seek to try new flavours.



Affordable Indulgence.

Restaurants are tapping into this trend by offering affordable add-ons including decadent dips that elevate dishes and make accessible celebrations more memorable.

The role of social media is paramount in this trend for operators and consumers sharing visually stunning dishes online.

