

## SOUTH KOREA FOODSERVICE EVOLVES AS GLOBAL MARKET STABILIZES, SIGNALING NEW SOURCING DYNAMICS

***According to Deloitte, South Korea's foodservice sector navigated shifting trends in 2025, with Street Food showing resilience, as TUTTOFOOD reinforces its role as a European hub connecting global buyers and supply chains***

**Milan, xx April 2026** – The global foodservice market is entering a phase of steady, moderate growth, approaching a value of €2.98 trillion in 2025, as the sector transitions beyond post-pandemic recovery into a more stable and structurally evolving environment.

According to an exclusive preview of Deloitte's *Foodservice Market Monitor 2026*, shared with TUTTOFOOD ahead of its release, global growth reached +2.2% in 2025 compared to 2024, with performance driven primarily by Europe (+6.0%) and Asia-Pacific (+3.2%).

*"Foodservice is entering a new phase shaped by evolving consumption models and supply chain complexity,"* said Antonio Cellie, CEO of Fiere di Parma. *"In this context, TUTTOFOOD, Southern Europe's leading food business platform, helps turn market insights into concrete business opportunities by connecting international suppliers with over 4,000 top buyers, supported by a Buyers Program organized in cooperation with ITA – Italian Trade Agency".*

*"In recent years, foodservice growth has been shaped by two main dynamics: the expansion of formats, with QSR playing a pivotal role, and the increasing penetration of chain operators, which are proving particularly effective in combining service, quality and customer experience,"* said Tommaso Nastasi, Deloitte partner and Value creation service leader. *"As a result, the channel is becoming progressively more attractive for the entire value chain. Partnerships with structured chains are enabling suppliers not only to streamline commercial efforts and optimize cost-to-serve, but also to engage in co-development initiatives, delivering more tailored offerings and ultimately generating greater value across the ecosystem".*

This shift marks a transition toward a "new normal", where operational efficiency, format innovation and supply chain integration are becoming the key competitive drivers across the industry.

South Korea's foodservice sector, valued at €62.4 billion in 2025, recorded a decrease of 14.1% compared to 2024. Amidst this transition, the sector's resilience is demonstrated by the Street Food segment, which recorded a positive growth rate of 0.6%.

The Street Food category, which proved resilient in the South Korean sector in 2025, is expected to be one of the fastest-expanding segments in the coming years globally, along with QSR, with North America and Asia-Pacific driving global growth fueled by these two models.

The South Korean foodservice market is expected to stabilize and build a solid outlook through 2030, reflecting continued opportunities for strategic investment in the food business.

### **Key global foodservice trends**

Globally, consumer preferences are evolving rapidly: premium packaging is emerging as a key driver of delivery growth, with 90% of consumers willing to order a wider variety of dishes when premium packaging is available, and 53% willing to pay a premium. At the same time, value for money is becoming increasingly central while approximately 80% of consumers are increasingly demanding digitalization across the customer journey, although these are not yet fully optimized across markets.

On the supply side, the growth of off-premises consumption is driving the redesign of formats, with 41% of operators planning more dedicated spaces for delivery and takeaway and 34% of QSR focusing on takeaway-only locations. Automation is spreading rapidly, with 74% of operators introducing technologies to improve productivity. While only 28% currently report benefits in profitability, this trend presents clear opportunities for further efficiency improvements and innovation.

### **About TUTTOFOOD**

TUTTOFOOD is Southern Europe's leading food business platform, bringing together global food innovation, sourcing, and market growth. Based in Milan, it serves as a dynamic hub for building solid strategic trade alliances among producers, distributors, and global markets. Organized by Fiere di Parma, a leading operator in the Italian and European exhibition industry, TUTTOFOOD stands as both a national and international benchmark for industry growth and the ongoing evolution of the food sector.