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TREND REPORT May 2025



MAY TREND REPORT

“The first harvest of spring reminds us: food is a living story, and every season writes a new chapter.”— Anonymous

Mother’s Day is just around the corner, and whether you are a mom, a mother figure, or someone who shares the spirit of care and support, your strength, resilience, and love inspire people around the world — values that touch every part of our lives, including the food we share and the communities we build. As we honor these influences, this report explores key shifts shaping the restaurant industry today, from openings and closings to the rise and fall of different cuisine types. We’ll also dive into how consumers and operators are feeling about tariffs, and highlight emerging springtime flavor and ingredient trends that are capturing attention.

38%

of consumers who celebrate Mother’s Day usually go to a restaurant or bar for food/beverages



Industry Landscape

Restaurant Openings and Closings '18-'24



From 2018 to 2024, the restaurant industry experienced major volatility in openings and closings, especially during the pandemic, followed by a period of recovery and gradual stabilization. Total active restaurant units grew overall but began to plateau toward the end of 2024, signaling a maturing and more competitive market.

Operator Mindset -Rising Operational Costs

75%

of operators
expect their food
costs will increase
in the next year

66%

of operators
expect their labor costs will
increase in
the next year

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2

KOREAN CUISINE IS **THE** FASTEST GROWING CUISINE TYPE

DEC '2019 -> DEC 2024

2,707 openings

1,543 closures

+31.51% unit growth



+22.99%
African

+22.87%
South
American

+22%
Indian

+20.03%
Caribbean



DECLINING CUISINE TYPES

-12.37%
Chinese

-10.22%
Sandwich
Deli

-9.39%
Steakhouse

-8.49%
BBQ



Tariffs and Consumer/Operator Sentiment

What Chipotle CEO says about Trumps' Tariffs

Bad weather and lower consumer spending caused Chipotle to miss its sales targets and see its first drop in same-store sales since 2020. CEO Scott Boatwright noted signs that customers were worried about the economy began as early as February. A visitation study highlighting this as the main reason customers were cutting back on restaurant visits. This slowdown has continued into April. Meanwhile, Chipotle CFO Adam Rymer said the company expects cost of sales to remain in the high 29% range due in part to “higher inflation across several items” and “the impact of the newly enacted tariffs [that] included aluminum and the broad-based 10% tariff.”

75%

of consumers are concerned about the potential impact of tariffs

63%

of operators are concerned about the potential impact of tariffs

82%

of operators are likely to raise prices to counteract higher costs due to tariffs

Tariffs and Consumer/Operator Sentiment

In spite of concerns over tariffs, in 2025, 65% of restaurant operators expect higher sales compared to the previous year. The top area where growth is expected is attracting new customers, followed by increasing check size and visit frequency from regulars. Operators believe improving menu options and bringing in more first-time and repeat customers will be the main drivers of future sales growth. Overall, optimism is strong but depends heavily on better customer experience, marketing, and menu innovation.



% expecting higher sales next year

Areas where Sales is Expected to Grow	
Will attract new customers	57%
Increase in check size per customer	42%
Increase frequency of regulars	31%
Increase in meals served/participation	37%
Increased entree sales	32%
Increase occupancy/census	23%
Drivers of Future Sales Increase	
Improving menu options	55%
More first-time customers	51%
More loyal repeat customers	50%
Improved customer service	44%
Overall economy will improve	43%

New Flavor and Ingredients Trending -Spring Menus

SAVORY SEASONAL FLAVORS & ITEMS	
GRILLED PEPPER	2,100
CORNED BEEF	1,650
RUEBEN	1,500
CAPRESE	700
SALAMI	600
DIJON	600
PEA	540
BEER CHEESE	500
BANANA PEPPER	386
FOCACCIA	386
SCALLION	355
BLACKENED	350
HONEY MUSTARD	281
STRAWBERRY	257

SWEET SEASONAL FLAVORS & ITEMS	
LAVENDER	1,300
COTTON CANDY	1,050
GREEN TEA	900
STRAWBERRY SHORTCAKE	900
COMPOTE	540
DRAGON FRUIT	531
SPRITZ	525
BIRTHDAY CAKE	518
IRISH	500
PROSECCO	500
WATERMELON LEMONDADE	500
BLUEBERRY	417
SLUSHY	400
HONEY	383

Datassential Launches & Ratings 2024, ITEM LAUNCH INDEX: Each season indexed vs. all other seasons in 2024; 100=average across seasons, so values over >100 mean that this ingredient or flavor is more common during that season.



Interested in creating your
next craveable sauce?

Contacting us today at:
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