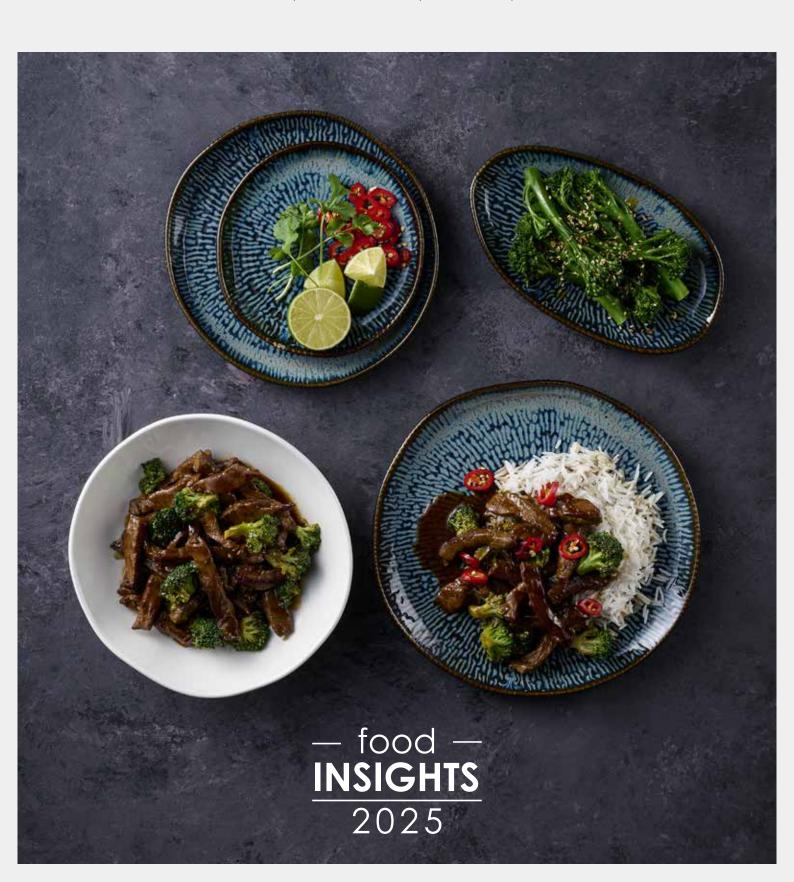


GREEN EATING | WELLNESS | EXPERIMENTAL FINE | ASIAN FUSIONS | US SOUL FOOD | MEDITERRANEAN MIX | IMMERSIVE DINING | NEWSTALGIA | TABLETOP PALETTES



OUR RESEARCH JOURNEY AROUND THE WORLD...



Throughout 2024 we continued our global research, identifying new restaurant openings and emerging food trends, offering insights into the evolving landscape of the hospitality industry.

Despite world-wide uncertainty and economic concerns, the restaurant industry has demonstrated remarkable resilience, with new concepts being launched daily.

2025-2026 looks set to see breakthrough trends, as well as industry favourites continuing with their popularity.

Our research spans a diverse range of cities, including San Francisco, Austin, New York, Lima, London, Leeds, Paris, Madrid, Barcelona, Berlin, Singapore, and Melbourne.

WELCOME TO THE 2025 EDITION OF CHURCHILL'S FOOD AND **RESTAURANT INSIGHTS** MAGAZINE WHERE WE SHOWCASE OUR RESEARCH INTO THE

2025 will bring more innovations to the international hospitality industry, with new technologies, experimental flavours and further progress with sustainability initiatives.

Eating out can offer diners a form of escapism, a break from routine and an opportunity to try something new. A chance to switch off from bad news and digital devices, and instead to connect with other people. Or to immerse oneself in a different atmosphere, travel through flavours and experience a sense of luxury that's detached from every day life. So with this chefs design their menus with experimental and global dishes, while interior spaces become immersive and transportative.

2025 will prove to be another exciting year of culinary creativity.

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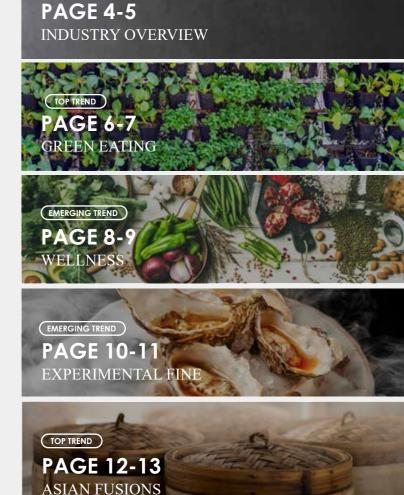
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HOSPITALITY INDUSTRY.















INDUSTRY THEMES

The hospitality industry is always changing to meet the evolving wants, tastes and interest of diners. Below discusses some of the key themes transforming how we dine.



The hospitality industry continues making strides forward in regards to sustainable practices, introducing circular economies, reducing waste and serving plant-based proteins or less resource intensive meats.

Technology is also playing a part in reducing waste, with Al inventory management and smart cooking systems.

Check Out

Nolla - Helsinki, Finland Local ingredients travelling minimal distances and leftovers turned into compost to grow their food. Michelin Guide Green Star for sustainability.



for more value from
eating out, restaurants are
tackling their own rising
costs by streamlining
menus and expanding
off-premise dining such
as deliveries and cook at
home meal kits.

Adopting new technologies is also improving efficiencies and reducing labour costs.

Check Out

Notto - LondonMichelin starred food,
under £20.



Advancements in new technology is allowing for smarter and more efficient operations. From diners digitally ordering to AI managing stock and waste back of house, restaurants are using tech and gadgets to reduce both their carbon footprint and their costs.

Check Out

Inamo - London Serving stunning pan-Asian cuisine with unique interactive table surface technology.



The trend for wellness is reshaping dining experiences. Functional foods with perceived health benefits feature more on menus, such as tumeric, matcha and kimchi. Both meat eaters and vegans are continuing to move away from highly processed foods and transparency on ingredients is key.

Check Out

Bump Green - Madrid
Healthy dishes, locally
sourced ingredients and
an atmosphere to help you
slow down and relax.



CIRCULAR ECONOMY I HYPER LOCAL SOURCING I AI EFFICIENCIES I LOW OR NO MEAT

The restaurant industry is continuously adapting and adopting practices to reduce environmental impact, therefore meeting the demand for eco-conscious dining.

WASTE REDUCTION

Restaurants are introducing circular economies, not only to help the environment but also to reduce costs, since around 10% of food purchased never gets seen by diners. Nose-to-Tail and Root-to-Stem cooking means that parts of produce that might have once been thrown away are now used, like vegetable peels into stock or bones into broth. Fermentation and preservation techniques are used to prolong shelf life while AI systems are being used to manage stock.





PROVENANCE OF FOOD

Diners are demanding more transparency about what they eat, and buying local, responsibly grown produce also adds value to a menu. The rise in restorative agriculture and urban farming means chefs can be more selective in sourcing their ingredients, meanwhile some restaurants are implementing their own in kitchen gardens or vertical farming systems.

TRENDSETTERS -

AME - BARCELONA

A seasonal menu with 90% of produce sourced locally.

ACME FIRE CULT - LONDON

A plant-forward BBQ restaurant that only sources from regenerative farms in the UK.

THE ELEPHANT ROOM - SINGAPORE Produce sourced from local markets

and an ambitious composting project.

BARGE EAST - LONDON

Furnished using upcycled materials and own-grown ingredients.

BONVIVANT COCKTAIL BISTRO - BERLIN Michelin star vegetarian and

vegan dishes.

BLUE HILL AT STONE BARNS - NYC

A high end farm to table restaurant and thought leaders in sustainability.

*Some of the innovative sites we've spotted on our global food research trips, not necessarily Churchill customers, just inspiring and pacesetting restaurants...











ARE CHURCHILL PLATES **SUSTAINABLE?**

Envisage Natural | White

At Churchill we are committed to a sustainable future, and our roadmap to Net-Zero by 2050.

> Learn more about our sustainability journey here...



SCAN ME







Green



ENVISAGE NATURAL





ENVISAGE EROSION



INKED ELEMENTS Fern



STONECAST RAW Brown



Andorra Green



MINDFUL EATING | FUNCTIONAL DIETS | RESTORATIVE LIFESTYLES | BODY & MINI

The wellness trend means that restaurants are now providing food and experiences that enhance both physical and mental wellbeing.

FUNCTIONAL FOODS

Science is only beginning to scratch the surface of how nutrition impacts both our physical and mental health, but some ingredients are already being hailed as foods with added benefits. Tumeric is said to be anti-inflammatory, matcha is packed with antioxidants while adaptogens like ginseng and mushrooms can combat stress. It's well recognised that probiotics like kimchi and yoghurt aid in gut health.





AQUATIC PLANT INGREDIENTS

Aquatic plants are forecast to be a growing trend as we head into 2025. Readily available and packed full of nutrients and protein, they are considered a sustainable food source. Duckweed has been consumed in Asia for centuries and with 43% protein when dry, plus micronutrients like iron, zinc, vitamin B12 and omega-6, it really is the ingredient with everything.

TRENDSETTERS -

GLASS HOUSE RETREAT - ESSEX

A eco wellness retreat with a healthy vegan menu.

OASES - NEW YORK

A space for wellness and healthy food in a tranquil, rejuvenating setting.

BUMPGREEN - MADRID A plant filled restaurant serving

A plant tilled restaurant serving vegan and gluten free dishes.

ITADAKIZEN - LONDON

Japanese, vegan and organic dishes in a tranquil space.

CIVANA WELLNESS RESORT - ARIZONA

A wellness retreat with a plant-forward restaurant and wholefood cafe.

DALUMA - BERLIN

Health food cafe with laid back vibes.

*Some of the innovative sites we've spotted on our global food research trips, not necessarily Churchill customers, just inspiring and pacesetting restaurants...



















INKED LYR



STONECAST CANVAS



ENVISAGE NATURAL White



INKED LYRA Blue



STONECAST RAW Grey



ENVISAGE EROSION Sand



STONECAST RAW Terracotta



Oslo Blue



CULINARY NARRATIVES | INNOVATION | CREATIVE EXPRESSION | CURATED MENUS

The rapidly expanding trend for experimental fine dining means escapism and luxury. It's a space where chefs can create narratives that resonate with diners, through local ingredients, innovative fusions of flavour and immersive elements.

ART, SCIENCE & STORY TELLING

Chefs express their individual voices through their menus or embody a restaurant's unique identity through the use of creative story telling and culinary innovations. Menus have the ability to tell a journey through a specific region or local culture, while plating up becomes an art form.





BREAKING WITH TRADITION

Experimental dining challenges expectations, eliminating rigid dinner structures in favour of more free flowing experiences. Chefs curate tasting menus, introducing unexpected courses and surprising twists, paired with drinks to create the ultimate luxurious eating out experience.

TRENDSETTERS -

ALCHEMIST - COPENHAGEN
A unique venue offering an immersive
experience and high concept dishes.

MEDUZA MEDITERANIA - NYC Reimagined Mediterranean classics made with avant guarde cooking ULTRAVIOLET - SHANGHAI

Iconic experimental restaurant with a multisensory menu.

ILIS - NYC

Fine dining cuisine all cooked in a wood fired kitchen.

FAT DUCK - BRAY

A pioneer in experimental dining, Heston Blumenthal's iconic restaurant.

FZN - DUBAI

A tasting menu served in areas of the restaurant designed as areas of chef Björn Frantzén's home.



















ALCHEMY SMOKE Black



STONECAST SPICE Pepper



ENVISAGE NATURAL



INKED LYRA Blue



INKED TIDE



INKED DELTA Grev



ALCHEMY ABSTRACT FEATURE PIECES White



Sapphire Blue - 11 -



MODERN FUSIONS | INNOVATION & TRADITION | PLANT-BASED | REGIONAL FLAVOURS

The most popular food trend in new restaurant openings all around the world, Southeast Asian flavours remain a firm favourite in both the casual and fine dining sectors.

AN INTERNATIONAL FAVOURITE

Asian dining continues to captivate diners globally, and remains the most prominent food style we see in new restaurant openings. Amongst the all time favourites like Chinese, Japanese and Vietnamese, there's also emerging cuisines from Myanmar, the Philippines and Malaysia to satisfy diner's who are curious about regional flavours.

The interactive and theatrical aspects of some Southeast Asian cuisines perfectly complement the current trend for interactive dining, such as Chinese hot pots and Korean barbecue.





A BALANCE OF INNOVATION & TRADITION

Restaurants around the world serving the cuisines of Southeast Asia are innovating to meet modern diner's needs, while staying deeply rooted in tradition. This includes more plant-based options using tofu, jackfruit and mushrooms, as well as focusing on the wellness trend with nutrient-rich dishes, served in tranquil spaces.

TRENDSETTERS —

MIDORI BY TAO - MELBOURNE

A contemporary fine restaurant serving plant-based sushi.

NYONYA - NYC

Laid back restaurant serving traditional Malaysian food.

LAHPET - LONDON

One of London's only Burmese restaurants; serving classical and contemporary dishes.

GOOD MORNING - VIETNAM- BERLIN

Authentic Vietnamese dishes that are 100% vegan, served in a light filled restaurant.

HOKKAIDO - MADRID

Serving vegan noodles, maki, sushi and desserts.

PLANTASIA - MEXICO CITY

Plant-based Pan-Asian dishes served in a serene sunlit space.

*Some of the innovative sites we've spotted on our global food research trips, not necessarily Churchill customers, just inspiring and pacesetting restaurants...



















ENVISAGE NATURAL



Oslo Blue



Inked Lyra



STUDIO PRINTS FUSION Quartz Black



INKED TIDE

Envisage Natural | White Envisage Cascade | Sapphire Blue

Emerge | Oslo Blue

Inked Tide | Black



ENVISAGE CASCADE



EMERGE Seattle Grey - 13 -



MODERN CLASSICS | PLANT-BASED BBQ | CULTURAL CONNECTIONS | LOW & SLOW

American soul food restaurants are innovating to meet the needs of modern diners, including plantbased barbecue foods, farm to table ingredients and elevated classics.

ELEVATING TRADITIONAL DISHES

Chefs are reinventing old time soul food favourites with luxury ingredients, such as truffle mac'n'cheese or duck fat fried chicken. A delicate balance is being maintained between deep cultural roots and innovative culinary techniques, so that modern diners around the world are able to experience authentic flavours and a taste of The South.







PLANTS, HEALTH AND NOSTALGIA

Keeping up with core dining trends, US Soul Food restaurants are finding plant-based alternatives to low'n'slow classics, such as jackfruit ribs. With wellness in mind, chefs are reducing sugar and creating nutrient dense versions of classic dishes, appealing to the health conscious diner. Finally, US Soul Food is the perfect cuisine to complement the trend for nostalgia, where consumers can find whimsical reinventions of childhood favourites.

TRENDSETTERS -

STOKED VEGAN BBQ - NORWICH

The UK's first 100% plant-based barbecue restaurant.

BARK BARBECUE - NYC

A popular pop up that's recently opened a permanent spot to serve it's low'n'slow food.

LOW AND SLOW - BRISTOL

Authentic low and slow barbecued meats.

BEER PLANT - AUSTIN

A 100% plant-based pub, serving vegan comfort food.

VIVA BURGER - MADRID

Iconic sit down vegan burger restaurant.

PLAQUEMINE LOCK - LONDON

A taste of Lousiana Cajun and Creole cuisine in a canal side restaurant.



















STUDIO PRINTS HOMESPUN CHROMA Carbon



STONECAST PATINA
Rust Red



STUDIO PRINTS
HOMESPUN ACCENTS
Quartz Black



STONECAST Peppercorn Grey



STONECAST PATINA Vintage Copper



STUDIO PRINTS RAKU



STONECAST CANVAS Coral



STONECAST RAW
Black - 15 -



SOCIAL DINING | ARTISANAL CRAFTSMANSHIP | ANCIENT GRAINS | NUTRIENT-DENSE

The fresh healthy dishes of Southern Europe continue to be popular on worldwide restaurant menus and as 2025 unfolds, we'll see more Greek, Portuguese and lesser known cuisines like Albanian.

KEEPING IT SIMPLE, SMALL AND ANCIENT

While there are innovations within Mediterranean dining, such as a spotlight on plant-based dishes and a focus on sustainability, part of the charm of the cuisines of the med is authenticity, rusticity and history. Chefs are keeping it simple with family recipes and are sourcing artisanal produce such as small batch olive oils, cheeses and cured meats. Whilst dishes are reimagined to incorporate additional nutrients, such as with ancient grains like farro, lentils and bulgar.





THE JOY OF MEAL TIMES

It's not only the nutrition in the Mediterranean diet that makes it fit so well with the Wellness trend, but also the social aspect of dining. The shared meals of mezze, tapas and family style feasting creates human connection, ideal for nurturing mental wellbeing.

TRENDSETTERS -

GALIO - LONDON

Nourishing Mediterranean fare made with local ingredients.

HALLE AUX GRAINS - PARIS

Back to basics cooking style with ancient grains, designed by Michel and Sebastien Bras.

RICHARD BISTRO - BERLIN

Down to earth restaurant serving modern Mediterranean cuisine.

ESTIATORIO NISI - NYC

Greek cuisine with a contemporary twist.

PASTAN BARBICAN - LONDON

100% plant-based pasta served in a relaxed atmosphere.

RUBY RIVIERIA - MELBOURNE

Recreating the warmth of Mediterranean hospitality, serving mezze, pizza and souvlaki.

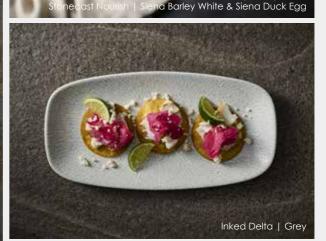




















INKED ERA



STUDIO PRINTS FUSION
Aquamarine



ENVISAGE CASCADE Sapphire Blue



INKED DELTA Grey



INKED TID



INKED LYRA Blue



STONECAST NOURISH
Siena Duck Egg - 17 -

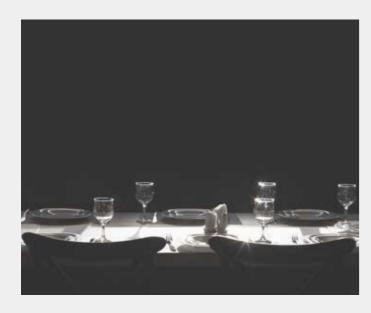


STORY TELLING | INTERACTIVE EXPERIENCES | TECHNOLOGY | MULTISENSORY

Through food, technology, atmosphere and creative storytelling, restaurants are creating multisensory and interactive experiences to elevate the act of dining into a meaningful event.

MULTISENSORY ENVIRONMENTS

In multisensory dining, sounds, scents and visuals are used to enhance the flavours of a meal. Restaurant environments are themed to transport diners to a different world, through decor, lighting or even virtual reality. Spaces are designed to complement the cuisine, such as a VR ocean scene alongside a seafood dish.





INTERACTION & NARRATIVE

Menus are being used to tell stories, for example each course might tell a chapter of a story and the wait staff act as narrators to guide the diner through the meal. Diners are often invited to participate in the narrative, perhaps by preparing part of the meal or through character role play.

TRENDSETTERS -

THE GINGER LINE - INTERNATIONAL

Originally from London, The Ginger Line host sell-out international immersive dining events.

7 PAINTINGS - DUBAI

An immersive dinner show themed around seven famous works of art.

ULTRAVIOLET - SHANGHAI

Paul Pairet's multi sensory 10 course tasting menu, served to 10 diners each night.

NEXT - CHICAGO

Next changes it's style and menu every few months to a new theme based on periods of time or parts of the world.

MARY Y VINO - PUERTO VALLARTA

A seafood restaurant where diners bare feet dangle in pools of water to enhance the coastal ambience.

THE MIND PALACE - LONDON

A speakeasy bar that hosts Sherlock Holmes themed murder mysteries.



















ALCHEMY SMOKE



STONECAST PATINA
Deep Purple



STUDIO PRINTS HOMESPUN CHROMA Carbon



INKED LYRA Blue



STONECAST PATINA Vintage Copper



STUDIO PRINTS ASTRO



STUDIO PRINTS FUSION
Quartz Black



STONECAST Lavender - 19 -



COMFORT | RETRO FAVOURITES | NOSTALGIC TREATS | POP CULTURE

Celebrating dining styles from the past, nostalgia is a significant trend in the international restaurant industry, creating emotionally rich and memorable experiences for diners.

PLAYFUL EXPERIENCES

The fun Newstalgia trend appeals to consumers emotions and helps them to escape the stresses of daily life. Childhood favourites are served in retro themed spaces, such as 1950's style diners or 1980's neon vibes. Chefs are also getting creative and playful with whimsical food presentation, like serving up in a school lunchbox or on cafeteria trays.





POP-CULTURE OF THE PAST

Restaurants use pop-culture icons from the past to tap into diners desires for nostalgia, such as 1970's Barbie themed cafes or pop ups inspired by 90's sitcom Saved By The Bell. Themed bars and restaurants pair storytelling with culinary creativity to offer memorable experiences and social-media sharable moments.

TRENDSETTERS -

JULIES - LONDON

Iconic bohemian hangout spot, restored to relive it's 1980's glory days.

SOLE CLUB - EDINBURGH

Seafood restaurant from the Six by Nico team, with inspiration from traditional fish and chip shops.

OLD HABITS - SINGAPORE

Diners eat surrounded by memorabilia in this fusion cafe and vintage shop.

COCODRILLO - BERLIN

Transporting diners back to Italy in the 1960's, in a fun and vibrant restaurant setting.

VIVA BURGER - MADRID

Iconic sit down vegan burger restaurant.

PLAQUEMINE LOCK - LONDON

A taste of Lousiana Cajun and Creole cuisine in a canal side restaurant.

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STONECAST





STONECAST Berry Red



RETRO BLUE Cobalt Blue



VINTAGE PRINTS Cranberry Toile





STONECAST Barley White

- 20 -

TABLETOP PALETTES

Tabletop palettes brings together all the trends - food, interior, colour - and mixes them with hospitality market insight. Our own in-house research monitors trends in new openings and in 2024 identified establishments continued mixing and matching tabletop products with almost 70% of venues combining colours and styles of tableware.

The Tabletop Palette concept is simple. It takes the key themes, across the trends, to group items from our ranges into complementary colour palettes. Making it easy to refresh menu items, marketing and the tabletop.

NEO-



NATURAL TONES Minimal NEUTRAL **TACTILE** Mindful Calming

FOREST ESCAPE **WILDERNESS** Green Eden Fresh Foliage MOSS TEXTURES Refreshing

AFTER DARK **Dramatic Tones** DARK EARTH Cosmic STATEMENT PIECES **Mysterious**





PLAYFUL

PASTELS

PRODUCTS FEATURED:

Ocean Blue: Emerge | Oslo Blue, Studio Prints Homespun Chroma | Marine, Stonecast Plume | Ultramarine Envisage Cascade | Sapphire Blue, Inked Lyra I Blue, Studio Prints Astro I Blue & Inked Elements I Coast.

PRODUCTS FEATURED:

Natural Tones: Studio Prints Stone | Agate Grev. Inked Elements | Dune, Stonecast Spice | Pepper, Studio Prints Raku | Agate Grey, Envisage Natural | White, Stonecast | Nutmeg Cream Stonecast Canvas | Natural & Studio Prints Kintsugi | Agate Grey.

PRODUCTS FEATURED:

Forest Escape: Stonecast Raw | Green, Stonecast | Barley White, Inked Elements | Fern, Envisage Erosion | Sand, Stonecast | Sage Green & Sorrel Green, Nourish I Andorra Green & Stonecast Plume I Olive.

PRODUCTS FEATURED:

After Dark: Studio Prints Fusion | Quartz Black, Nourish | Seattle Grey, Studio Prints Homespun Chroma | Carbon, Inked Tide | Black, Alchemy Smoke | Black, Studio Prints Homespun Accents | Quartz Black, Stonecast Raw | Black, Studio Prints Kintsugi Accents | Quartz Black & Inked Delta | Grey.

PRODUCTS FEATURED:

Neo-Retro: Nourish | Tokyo Black, Studio Prints Kintsugi | Coral, Stonecast Patina | Vintage Coppe Stonecast | Mustard Seed Yellow, Truffle & Java Blue.

PRODUCTS FEATURED:

Playful Pastels: Studio Prints Fusion | Aquamarine, Studio Prints Raku | Rose Quartz Pink, Inked Era | Blue, Studio Prints Homespun Accents | Jasper Grey, Stonecast | Duck Egg Blue & Petal Pink, Inked Lyra | Pink & Stonecast | Lavender



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