

Q4 2025 Report

Transforming the Idea of What is Possible,
Totally Redefining the Experience in the Process



Delivering Fresh. Always. is our ongoing pursuit of better solutions that meet industry requirements, unarticulated needs, and existing market demands, as well as gauging what the future may hold.

We can see a problem and creatively solve it by taking a transformative approach that turns an opportunity into endless innovative possibilities.

Please refer to our Fresh Trends Market Report to learn more about how we can help make it easier and more profitable to display and sell fresh food.



Consumer Purchases Driven by Food Safety

More than half of consumers (51%) are “likely” or “very likely” to stop buying from a brand that experiences a food safety incident. Millennials (57%) and parents (58%) are even more likely to stop buying from a brand after a food safety incident, with both groups saying they are “likely” or “very likely” to do so.

Source: Food Industry Executive, 2025 Consumer Foods Trends Report

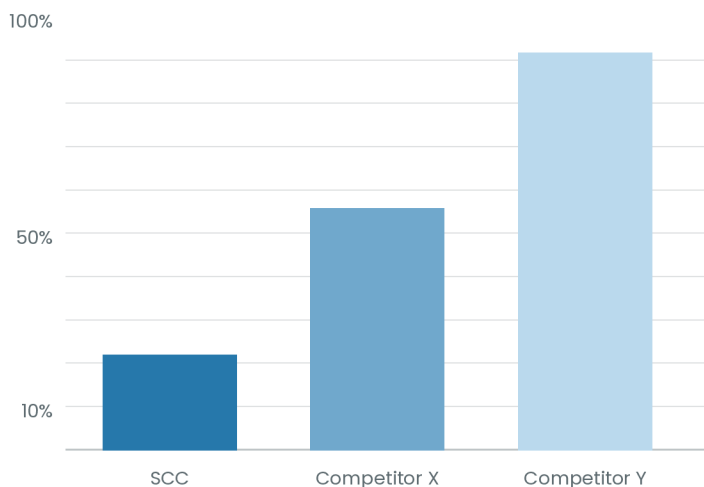
Lowest Total Cost for Foodservice Safety Operations

In independent tests conducted by the National Food Lab, Structural Concepts has the lowest total costs related to the quality and safety of the food products beyond waste and loss including the longer-term labor expenses involved in restocking the merchandiser.

Hence, if the same amount of food is expected to be offered to the public and kept throughout all existing dayparts, the other manufacturers that were evaluated would require incremental labor costs to replace and refill as compared to Structural Concepts due to their higher spoilage rates.

Food Preservation

Percent Quality of Change Over Time



Source: National Food Lab





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Generational Shift: Younger Consumers Drive Demand for Prepared Food

McKinsey's 2025 survey reveals that 77% of Gen Z and 72% of millennials purchase on-the-go meals monthly, compared to 57% of Gen X and 33% of baby boomers. This generational disparity underscores a growing demand for quick, convenient meal solutions among younger demographics. The data aligns with broader trends of urbanization and busier lifestyles, where time efficiency is a priority.

Prepared and Ready for Profitability

Structural Concepts' Blend self-service cases form an attractively efficient display for prepared foods that conforms within foodservice format. Using a modular platform, these merchandisers were designed with seamless transition features making the product inside the hero. With refrigerated, heated, and ambient case options in one island, products can be displayed more dynamically, attracting more consumers, and increasing cross-merchandising opportunities to generate more revenue.



The Changing World of Grab and Go

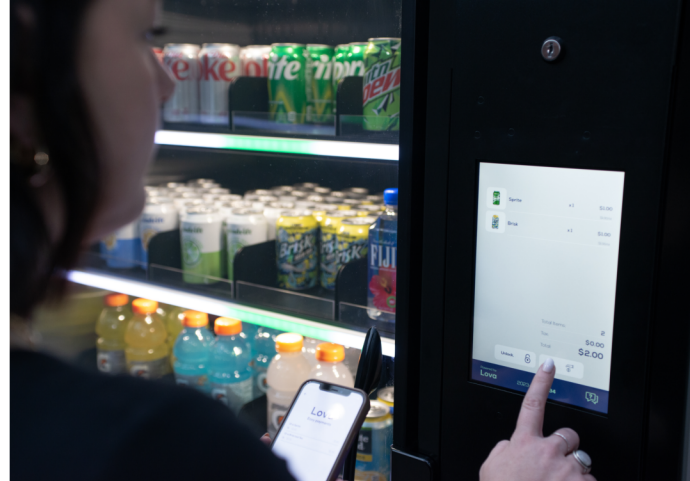
Originally prevalent in convenience stores, airports, and college campuses, grab and go concepts have expanded across diverse markets, with 76% of consumers now considering a grocery store's prepared food offerings before a visit. This shift reflects changing dining and snacking habits, driven by factors such as evolving work hours and preferences for quick, affordable meals.

Source: Nestle

Helping Supermarkets Transition

With a deep portfolio of self-service displays and merchandisers, Structural Concepts optimizes grab and go purchases anywhere in a supermarket, including high traffic areas, while incorporating unique upsell and impulse-buying opportunities, that provide functionality and space optimization, seamlessly aligning with any store décor.





Personalization is an Outlet to Overcome College Stressors

College food can serve as an outlet for students who want control over their diet, health, and even mental wellbeing. This aligns with a larger shift in consumer attitudes towards “treats.” 64% of consumers prefer to splurge on small treats more frequently, rather than larger luxuries less frequently. Students seek more experiential and personalized university dining, but that’s also convenient for them.

Source: Nestle

Generating More Sales and Profits with Autonomous Shopping

The Structural Concepts’ ARM (Autonomous Retail Merchandiser) provides modern students with access to food outside of traditional mealtimes as well as during normal operating hours.

Operating seamlessly on a 24/7 basis and holding 23% more merchandise than other models, the ARM offers college and university food service operators the opportunity to get creative with “build your own” options for students – while also providing them with 100% inventory management control in monitoring and tracking the best selections.



Stadium Operators Need to Work Harder Than Ever to Attract Fans When It Comes to Foodservice

Ticketholders at sporting and concert events have been seen still getting Uber Eats deliveries to the entrance gate and then collecting them and going directly to their seats. Fans want more space to linger, dwell and talk about the game, and they want different food options and onsite venues to create a unique event experience. For designers, this trend has emerged an exciting new phase where hospitality forms part of the design process right from the start. Traditionally, the architecture of stadiums revolved around only infrastructure and simple spaces on a map that indicated F&B offerings rather than a full incorporated plan.

Source: [Sportsbusiness.com](https://www.sportsbusiness.com)



Create Cohesive Foodservice Programs and Experiences

Structural Concepts specializes in visualizing a solution and thoughtfully develop merchandisers that can be easily integrated into new or existing formats to ensure continuity of fit and design. With flexible, turnkey fresh food merchandisers and displays, Structural Concepts' have helped venues benefit from the sheer volume of foot traffic by maximizing food merchandising capacity using versatile solutions that draw in the consumer while reducing labor challenges by providing convenient, fresh food options to eventgoers with displays that meet industry requirements and existing market demands.





College Dining Is On the Go

On-campus convenience stores and marketplaces have been in style over the last 20 years, giving students and staff an easy way to grab food and beverages on the go. These markets are only going to become more prevalent than the traditional dining halls and common areas. In fact, now might be the perfect time to convert those spots into spacious mini marts with self-checkout stations.

Source: Chartwells

Upping the Grab and Go Experience

While a traditional grab and go market includes the usual beverages and packaged foods like chips and sandwiches, Structural Concepts has helped foodservice operators in higher education evolve their self-service operations over the years with versatile displays and merchandisers to include healthier and fresher options including those traditionally offered in formal dining halls.



The Out-Of-Home (OOH) Food Market Is Shifting

More people are eating out, with meal occasions rising 8.7% year-on-year, but consumer behaviors are evolving in ways that demand a rethink from operators.

Driven by changing work patterns, growing demand for convenience, and shifting consumer priorities, evolving behaviors demand a fresh approach. Breakfast is the fastest-growing occasion, surging 13.7%, while lunch remains the most valuable but its growth is slowing. Meanwhile, dinner, a market growing at 5.7% offers untapped potential.

Source: Kantar



Maximizing Foodservice Business During All Dayparts

We can help create a destination for fresh food by proactively delivering innovative display options that not only blend in with the store format but also offer cost-effective configurable turnkey solutions when daypart merchandising strategies change over time.

Structural Concepts also reduces labor and increases fixed capacity by turning over more customers with self-service displays and service merchandisers where diners can immediately access a wide range of selected menu items.