Kitchen Barometer 2026



Foreword

A quick guide to the Kitchen Barometer 2026

Restaurant and hotel kitchen operations stand at a critical juncture. The challenges facing the industry today are not isolated incidents but interconnected pressures that test operational resilience across every facet of the business. When asked about their most pressing obstacles, kitchen operators' responses painted a clear picture: **Labor shortages, cost pressures, and the imperative to maintain quality amid volatility** define the current reality.

As one operator stated simply, "I think the personnel problem is the biggest issue. There's a general labor shortage." This challenge reverberates globally, compounded by regional factors. A United Kingdom respondent noted, "it's not easy to get new staff members after Brexit," while others emphasized that "retaining good employees is difficult." The staffing crisis is not merely about headcount—it's about sustaining the expertise and consistency that kitchens depend on.

Simultaneously, **cost pressures** are intensifying. "The cost of food has forced us to increase the menu prices. The demand for higher wages has also contributed to higher menu prices," explained one respondent. Another captured the urgency: "Honestly, the rising prices and the supply chain bottleneck are an issue. It's wreaking havoc on my business." The dilemma is unforgiving: **Operators must balance margins with affordability, all while maintaining the quality standards guests expect.** As one respondent put it, "A big challenge is adjusting prices for inflation while maintaining quality and ensuring affordability for guests."

The Rational Kitchen Barometer 2026 examines how kitchen operators across Germany, France, Japan, the United Kingdom, and the United States are navigating these converging pressures. The Barometer investigates **five topics:**

- **Operational Costs**
- **Sustainability**
- **Skilled Worker Shortage**
- **Quality Assurance**
- **Digitalization**

For each topic, the Barometer follows a **consistent framework: the topic's impact on operations, a deep dive into current realities, and the solutions** kitchen operators are implementing in response.

Clear patterns emerge across all five areas: Operational costs are creating regional divergence, with energy pressures hitting European markets hardest. Sustainability has moved from aspiration to action, with most operators implementing multiple measures. Skilled worker shortages are driving retention strategies and efficiency gains. Quality assurance is becoming technology-enabled, not just process-based. And digitalization is advancing, with early adopters seeing substantial benefits.



The sector is at an inflection point. Today's operational responses may define tomorrow's most resilient businesses. The Kitchen Barometer 2026 offers data-driven insights to help kitchen operators build that resilience and chart a path forward.

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Introduction

Navigating Future Uncertainty

Cost and Workforce Challenges Expected

Restaurant and hotel kitchen operations face major changes ahead: Rising costs are squeezing margins while labor shortages limit capacity. Decision-makers see the warning signs and expect several factors to shape their businesses over the coming year.

Rising energy prices top the list of upcoming concerns, with over two thirds (67%) of respondents globally expecting them to hit their budgets. This concern is especially strong in France, where 80% of kitchen operators are preparing for a price jump, and in Germany, where 78% expect higher energy costs to strongly influence business conditions over the next 12 months. Commercial kitchens are energy-intensive, with continuous demand from cooking equipment and refrigeration systems. They're especially vulnerable to energy price swings.

Beyond energy costs, **inflation and the general price level** is an anticipated issue for 63% of respondents, underscoring broader economic pressure. Higher bills mean difficult decisions: raise menu prices and risk losing price-sensitive guests, or absorb costs and compress already thin margins. **Finding skilled workers** represents another critical challenge in the coming year, cited by 59% of operators worldwide. In Germany, this number even reaches 68%. The result: longer hiring processes, compromises on candidate qualifications, or operating short-staffed.

Regional differences also emerge in **anticipated guest behavior.** In Germany, 72% of kitchen operators believe that guest behaviors will change in the next 12 months, while only 40% of their counterparts in Japan and 46% in the United States believe the same.

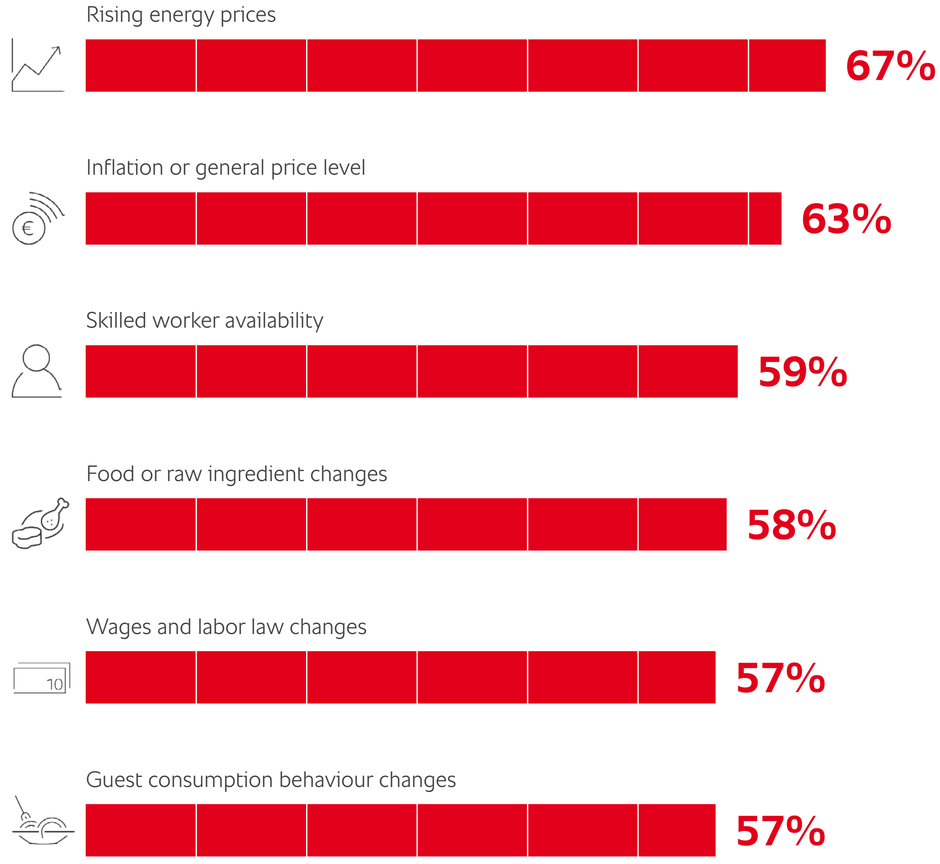
Professional kitchen operators are navigating a period where traditional models are being challenged and new strategies are necessary. The Kitchen Barometer 2026 examines how kitchen operators in Germany, France, Japan, the United Kingdom and the US are navigating these converging pressures. Based on a quantitative survey, the Barometer offers data-driven insights and actionable implications to help kitchen operators build resilience and plan for long-term success.

Rising energy prices for electricity, gas and heating are the top anticipated challenge in **Germany** (80%), **France** (78%) and **Japan** (66%).

The **inflation** and **general price level** rises are on top of mind for respondents in the **United Kingdom** (64%) and the **United States** (62%).

Key External Factors Professional Kitchens Face in the Coming Year

External factors to (strongly) influence businesses in the next 12 months[1]



[1] Graphic shows six most frequent responses.
Source: Online-survey conducted by Statista on behalf of RATIONAL (Q4/2025)

Topic 1: Operational Costs

Rising Operational Costs

Cost Dynamics Challenge Restaurant Kitchen Profitability

Global Cost Pressures Local Differences: Where Restaurant Kitchen Operations Feel the Impact Most

(Drastically) increased costs[1] in ...	all regions	Germany	France	Japan	UK	US
Food and raw ingredients	56%	56%	48%	64%	56%	56%
Energy	52%	70%	68%	36%	50%	38%
Packaging or logistics	50%	56%	58%	46%	46%	42%
Personnel	44%	50%	44%	36%	54%	38%
Kitchen equipment maintenance	41%	34%	42%	36%	50%	44%

While rising expenses are a major pain point, kitchen operators have also been facing broader economic headwinds over the past 12 months. **44%** cite volatility or delays in supply chains, such as longer delivery times and delivery failures, as having a significant impact.

Over the past 12 months, operating costs have increased across all regions, placing restaurant kitchen operations under significant strain. These rising expenses force difficult choices: which costs to absorb, where to cut back, and how much to pass on to guests through higher prices. The intensity and nature of these pressures vary by country.

Food and raw ingredients are the most pressing cost concern globally, with 56% of respondents reporting significant increases over the past year. Higher food prices mean reformulating recipes, negotiating harder with suppliers, adjusting portion sizes, or raising menu prices – all while trying to maintain the quality guests expect. The challenge is particularly acute in Japan, where 64% of operators have experienced significant increases in ingredient costs.

Energy costs follow closely behind, with 52% of respondents across regions reporting significant increases. However, regional variation is considerable: In Germany, 70% of kitchen operators have faced sharp increases in energy costs, while France follows at 68%. By contrast, Japan (36%) and the United States (38%) report comparatively lower energy cost pressures. **Packaging and logistics costs** have increased for half of operators globally. France leads in this category at 58%, followed by Germany at 56%, indicating potential supply chain pressures in these European markets.

Personnel costs show similar regional divergence: While 44% of operators globally report significant increases, this figure rises to 54% in the United Kingdom and 50% in Germany. Higher wage pressures mean operators must either increase labor budgets, squeezing margins further, or risk losing staff to competitors who can pay more. Japan (36%) and the United States (38%) again see fewer significant personnel cost increases than the global average. This pattern – more moderate cost increases in Japan and the United States compared to European markets – recurs across multiple categories, suggesting regional economic conditions drive these differences.

Maintenance and repair costs for **kitchen equipment** have increased for 41% of respondents across regions. However, this challenge is most pronounced in the United Kingdom, where half of all operators (50%) report drastic increases, compared to just 34% in Germany. When faced with higher costs, some kitchen operators could delay non-critical repairs, potentially risking unexpected equipment failures.

Larger economic conditions, rather than only industry-specific factors, drive these regional cost variations. Operators must understand their local cost environment and prioritize investments accordingly – whether that means energy-efficient equipment in Germany and France, or wage competitiveness strategies in the UK.

Rising costs demand targeted responses. Kitchen operators are pursuing solutions across multiple fronts. Energy-efficient appliances represent a strategic investment for 75%, addressing both immediate cost pressures and long-term sustainability goals (see page 12). Understanding cost dynamics is the first step; strategic investment is the next.

Higher energy and maintenance costs are forcing a fundamental shift: Kitchen operators are rethinking their equipment. Efficiency is no longer optional – **it's essential.**

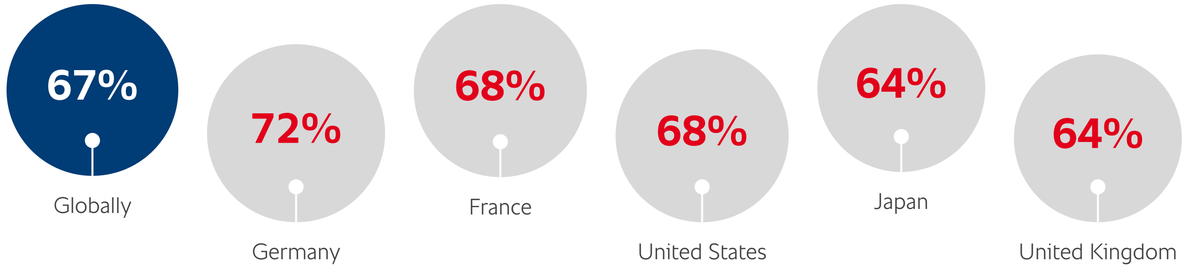
[1] Graphic shows five most frequent responses.
Source: Online-survey conducted by Statista on behalf of RATIONAL (Q4/2025)

Topic 2: Sustainability

Sustainability in Practice

Kitchen Operations Are Responding to Evolving Expectations

Sustainability as a central or important topic



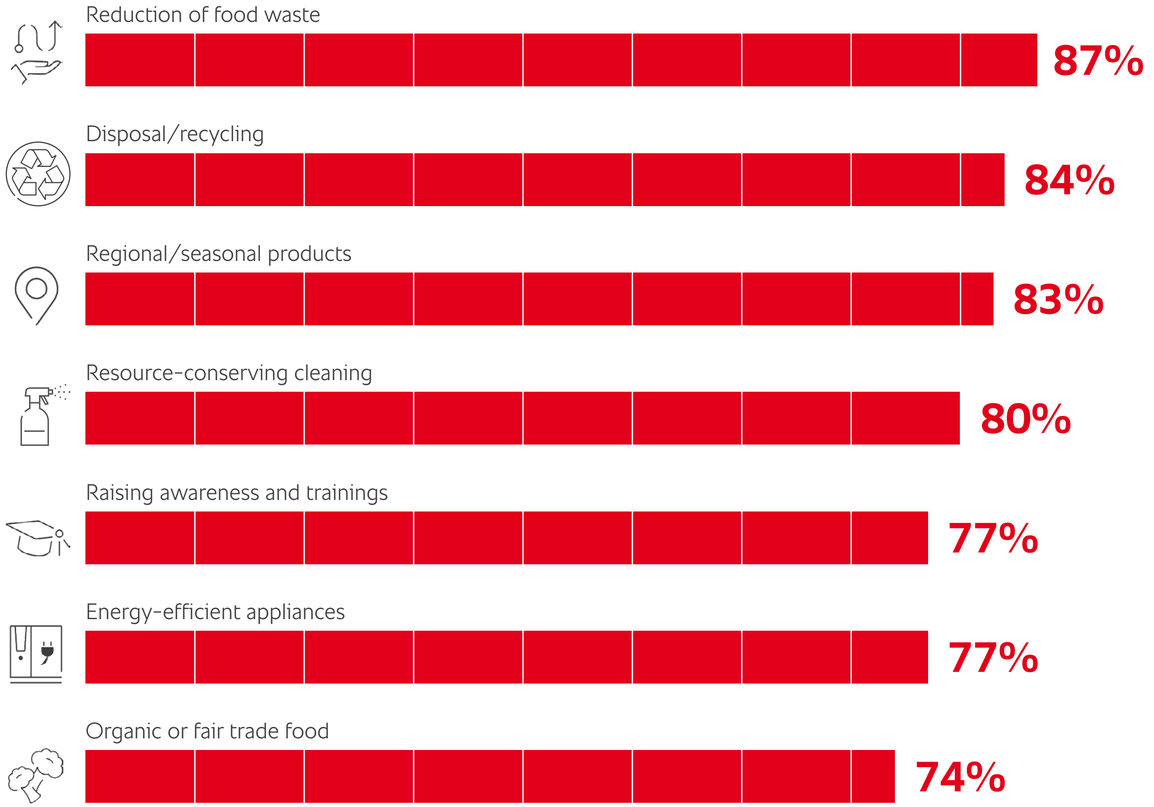
Kitchen operators perceive growing guest demand for sustainability. 62% report increased demand for environmental responsibility – and they are responding. **For over two thirds (67%) of kitchen operators, sustainability is a central or important business priority.** This focus holds across all surveyed regions, demonstrating broad consensus on sustainability's strategic importance.

Kitchen operators that prioritize sustainability are translating it into practice. The **reduction of food waste** (87%) tops the list, and further measures related to sustainability follow closely. 83% have incorporated **regional and seasonal products** into their menus, directly addressing guest preferences for local sourcing. Notably, 77% of operators are investing in **staff trainings and awareness,** because engaged, informed teams make practices stick. Another 77% are using **energy-efficient kitchen appliances** and technology to strengthen their sustainability strategies. This figure climbs to 89% in the United Kingdom, pointing to strong tech adoption in this market.

The data paint a clear picture: Kitchen operators are rolling out sustainability measures across multiple areas. But, there is still room to go even further. Measures like food waste reduction, for example, are largely reactive. **Proactive strategies like food waste prevention represent a possible next step.** Sustainability is moving from aspiration to action, touching operations, technology, and people. The challenge ahead lies in measuring and commu-

How Professional Kitchens Are Embedding More Sustainable Practices

Implemented sustainability measures[1]



[1] Only respondents for whom sustainability plays at least a certain role. Graphic shows selected responses.
Source: Online-survey conducted by Statista on behalf of RATIONAL (Q4/2025)

Topic 3: Skilled Worker Shortage

Skilled Labor Shortfalls

Operational Impacts of Skilled Worker Shortages

Skilled worker shortages – identified earlier as a top anticipated challenge – are already affecting operations. **Nearly two-thirds (64%) of kitchen operators report significant impact from skilled worker shortages over the past 12 months.** The consequences are far-reaching, affecting service quality, capacity, and employee well-being.

The most acute impact of skilled worker shortages is **increased workload for existing staff,** reported by 57% of respondents. This outpaces other consequences, underscoring how remaining staff bear the biggest burden by taking on additional tasks and working longer shifts. In Japan, this pressure is particularly acute: 72% of operators report increased workloads, well above the global average. This increased workload can create a vicious cycle: Overburdened staff may leave, further deepening shortages and intensifying pressure on those who remain.

Beyond workload, skilled worker shortages produce cascading effects. **Longer wait times** hit 39% of kitchen operations globally. France and the United Kingdom experience this at elevated rates, with half of respondents in both countries reporting increased wait times. Additionally, **limited service offerings** are reported by 34% of kitchen operators. Ultimately, skilled worker shortages even result in **reduced opening hours** for almost one in four (23%) respondents. Operators close earlier or open fewer days during the week, directly limiting revenue potential and market presence. These operational constraints shape the guest experience and can conflict with expectations for service quality and flexibility.

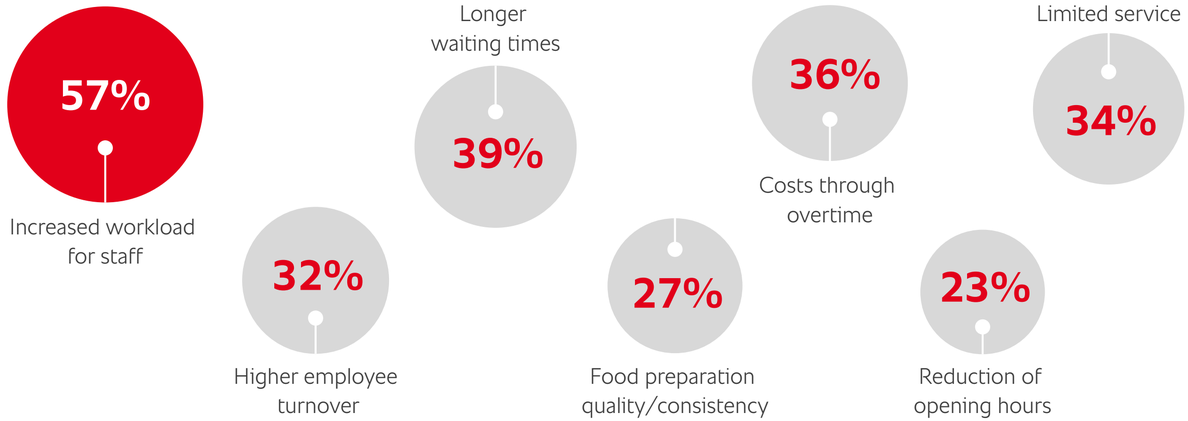
The data reveal skilled worker shortages as both a near-term constraint and a long-term risk, creating pressure points across service capacity, revenue generation, and employee retention. Kitchen operators face

> For 64% of restaurant kitchen operators across regions, skilled worker shortages have had a significant impact during the last 12 months.

Impact of Skilled Worker Shortages by Country in the Last 12 Months



Impact of skilled worker shortages[1]



[1] Only respondents for whom the shortage of skilled workers had an impact on the business. Multiple answers possible. Graphic shows selected responses.
Source: Online-survey conducted by Statista on behalf of RATIONAL (Q4/2025)

Topic 3: Skilled Worker Shortage

Staffing Solutions

Current Measures and Strategic Priorities

In response to skilled worker shortages and their cascading impacts, **restaurant kitchen operators are taking action on multiple fronts.** Yet gaps remain between current implementation and perceived future value, creating room for further transformation.

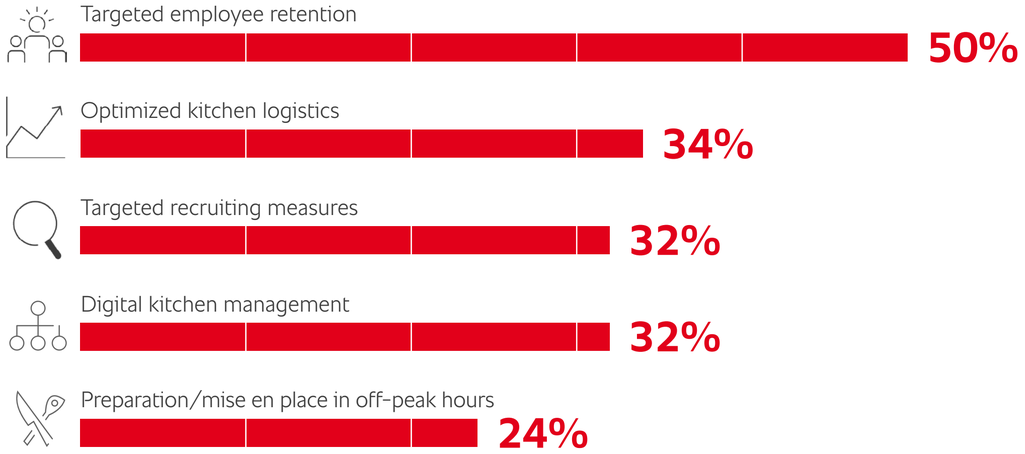
Targeted **employee retention strategies** lead both current implementation and perceived future potential. Half of respondents (50%) have already introduced retention initiatives and employer branding efforts, including benefits, bonuses, or flexible working hours. Looking ahead, 60% of operators see further potential in retention strategies. Additionally, targeted **recruiting** measures have been introduced by 32% of operators. Regional variation is notable: In France, 62% have introduced retention measures, while Japan stands at 26%. This gap likely reflects different labor market conditions, cultural norms around retention incentives, or alternative workforce strategies.

Beyond retention, kitchen operators are pursuing **efficiency** measures. 34% have optimized their **kitchen logistics and layout** to improve workflow and reduce strain on staff. In Germany, this figure reaches 42%, indicating stronger emphasis on operational efficiency and engineering principles in kitchen design. Globally, almost one in four respondents (24%) leverage **preparation and mise en place during off-peak hours** to distribute workload more evenly.

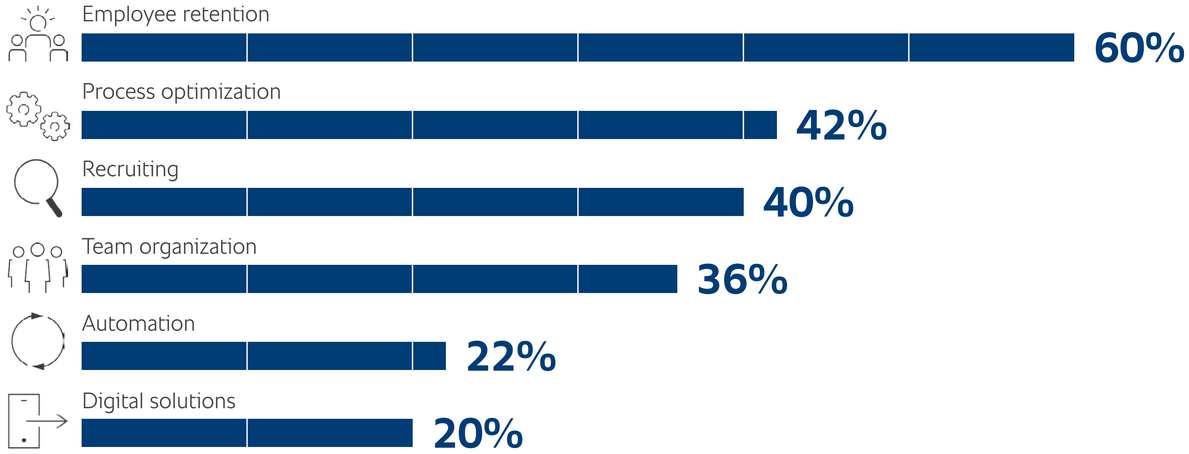
Digital solutions show strong promise, but adoption lags awareness. Only 32% have implemented digital kitchen management systems, yet they're seeing results: 86% of kitchen management system users report substantial benefits (see page 9). However, **only 20% of operators overall identify digital solutions as having significant future potential,** and 22% see promise in automation. This suggests that early-adopter gains haven't scaled into broad awareness. As implementation costs decline and case studies accumulate, the demonstrated value among current users may drive broader adoption, particularly as workforce pressures intensify.

Current Actions and Future Potential to Address Workforce Shortages

Introduced measures to counter staff shortages[1]



Potential to counter skilled worker shortages[2]



[1] Multiple answers possible. Graphic shows selected responses.; [2] Maximum of three answers possible. Graphic shows six most frequent responses.
Source: Online-survey conducted by Statista on behalf of RATIONAL (Q4/2025)

Topic 4: Quality Assurance

Quality in Times of Volatility

Human-Centric and Technological Measures Build Resilience

Quality is under pressure. 27% of kitchen operators report declines in food preparation quality and consistency due to skilled worker shortages. The impact is direct: Inconsistent output threatens customer satisfaction and operational stability. Kitchen operators use a dual approach, combining people-focused processes with technology. Quality assurance is no longer just good practice, but essential for maintaining standards even as workforce challenges intensify.

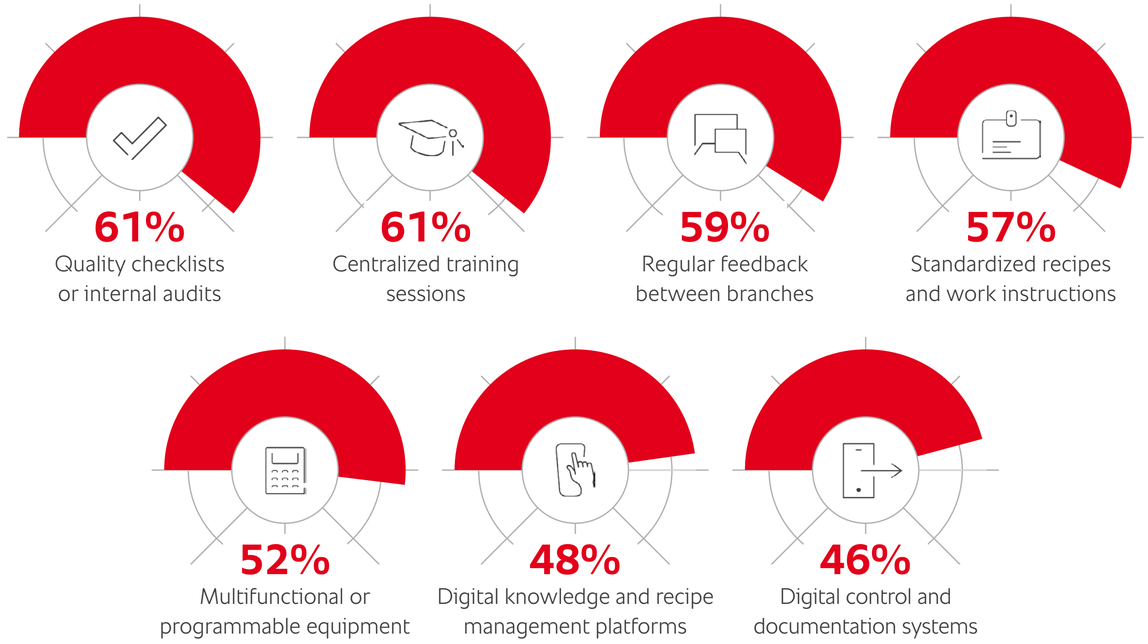
Staff-centered measures lead quality assurance efforts. **Quality checklists** and **centralized training sessions** are each used by 61% of respondents, making them the most widely adopted strategies. Checklists ensure compliance with standards and identify areas for improvement, while trainings enable kitchens to standardize skills and knowledge across operations. **Regular cross-site feedback loops** (59%) improve communication and speed responses to quality issues. The United Kingdom leads in checklists (70%), while in the United States, trainings are particularly widespread (72%). These human-centric measures are critical amid skilled worker shortages and staff turnover, providing structured frameworks that maintain quality standards even as teams change.

Technology provides a second pillar of quality assurance. Over half (52%) of operators have adopted **multifunctional or programmable kitchen equipment** to automate and standardize cooking processes. Here, Japan leads at 65%. By contrast, the United Kingdom (44%) and United States (46%) trail the international average. This reveals **regional strategic divergence:** The United Kingdom and United States favor process-based human measures while Japan emphasizes technological standardization.

Beyond equipment, software plays a growing role in standardizing and documenting quality processes. **Digital recipe management** platforms (48%) and **digital control and documentation systems** (46%) complement traditional methods, enabling real-time access to standardized procedures and automated quality tracking.

Quality assurance approaches vary by region, but the principle holds: Combining staff-centered measures with technology builds resilience that supports customer satisfaction and operational capacity.

Raising the Bar: Kitchens Maintain Quality amid Industry Challenges
Introduced measures for product and service quality[1]



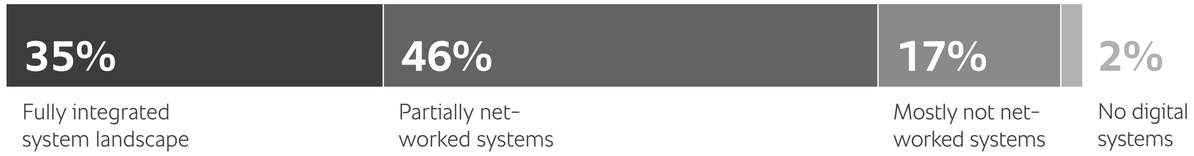
[1] In Japan, only respondents that work in restaurants with multiple locations were asked. Multiple answers possible. Graphic shows selected responses
Source: Online-survey conducted by Statista on behalf of RATIONAL (Q4/2025)

Topic 5: Digitalization

Transformation in Progress

From Standalone Applications to Fully Integrated Systems

Digitalization in Progress: Few Kitchens Are Fully Connected



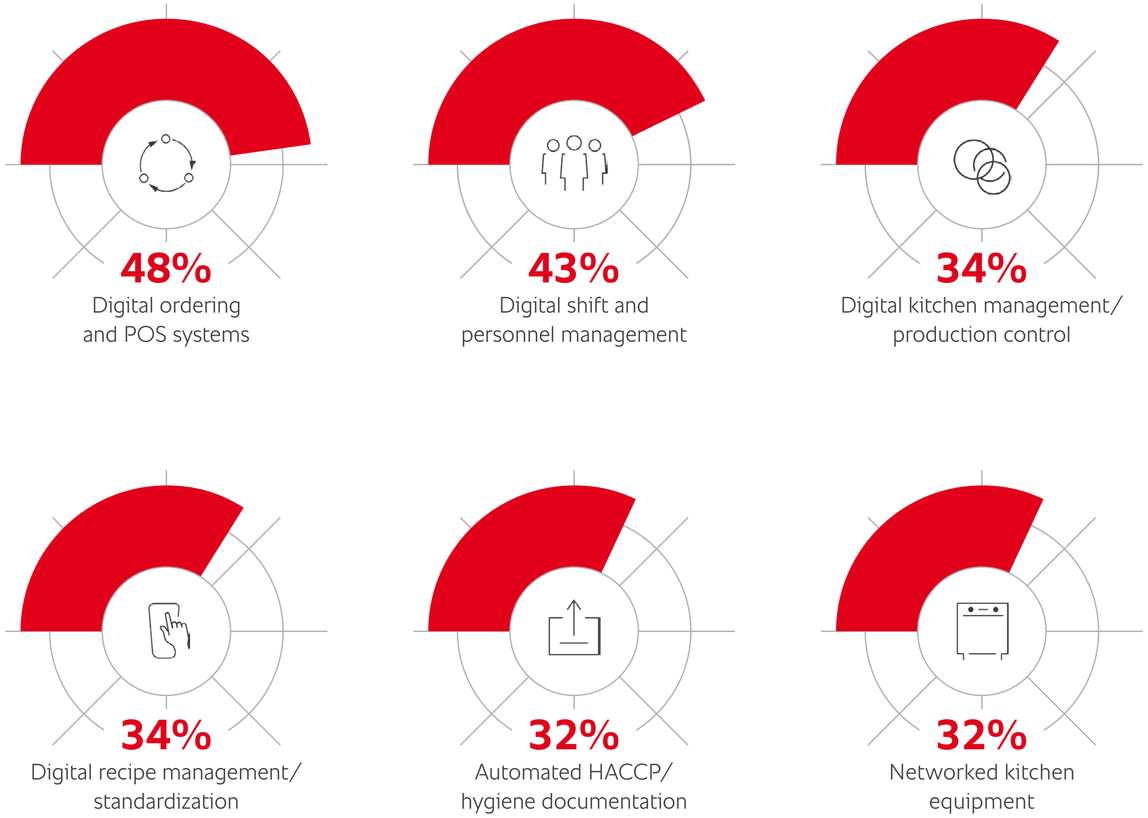
Restaurant kitchens are digitizing at different depths and speeds. The catalyst: mounting operational costs that demand efficiency gains. Nearly all respondents (98%) use some form of digital systems. However, the **integration levels** reveal a more nuanced picture: 35% run fully integrated systems, 46% use partially networked setups, and 17% still rely on largely standalone tools. This distribution points to an industry in transition, moving from legacy processes to end-to-end digitalization.

Integration levels **vary by country,** revealing distinct stages of technological maturity. In the United States, 52% of kitchen operators run **fully integrated systems,** suggesting greater infrastructure investment or earlier adoption. In Germany, 56% of respondents use **partially integrated systems,** indicating a mid-transition stage. In Japan, only 16% report fully integrated systems, the lowest among surveyed markets.

Adoption patterns show where kitchen operators see immediate value. Nearly half (48%) use **digital ordering and POS systems,** directly addressing guest experience and revenue visibility. 43% use digital **scheduling and personnel management** to address labor challenges. 34% have adopted kitchen management and production control systems, along with digital recipe management and standardization, bringing structure and consistency to core operations. 32% **use networked kitchen equipment,** enabling real-time monitoring and predictive maintenance.

Kitchen operators prioritize customer-facing and workforce management technologies, likely because they directly impact revenue and labor efficiency. Full system integration and networked equipment are earlier in the adoption curve, but momentum toward integration appears strong. Among those not yet fully integrated, two-thirds (66%) plan to go further, demonstrating clear intent to advance technological capabilities. The trajectory is clear: Invest in digital infrastructure to address workforce constraints and cost pressures.

Introduced applications[1]



[1] Graphic shows selected responses.
Source: Online-survey conducted by Statista on behalf of RATIONAL (Q4/2025)

Topic 5: Digitalization

Realizing Digital Benefits

Actual and Anticipated Advantages of

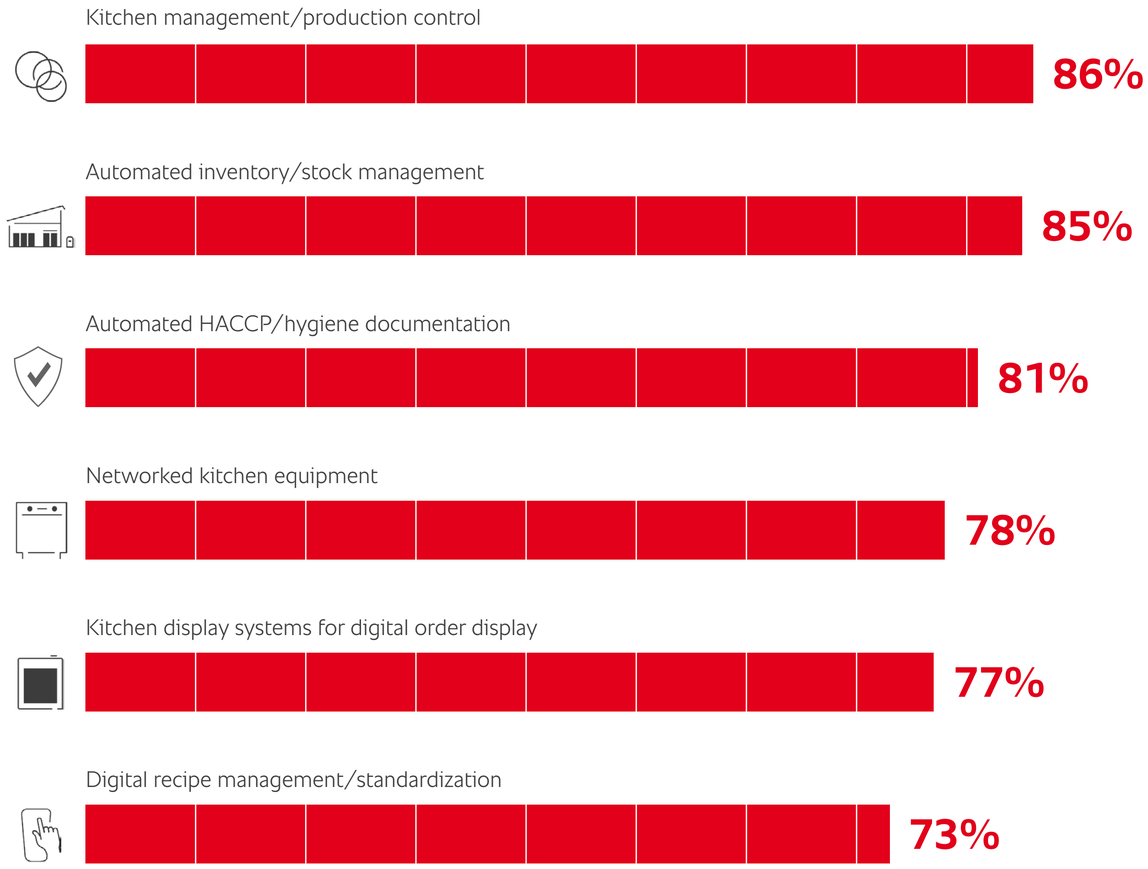
Digital systems and applications deliver tangible benefits, even if adoption can be slow. For operators who have adopted them, the advantages are clear and substantial. This reinforces the case for technological investment: Kitchen digitalization delivers improvements across core operations.

Operators who use digital applications report **strong benefits:** The biggest wins are in planning and execution. 86% report major benefits from digital **kitchen management and production control,** the highest among all digital applications. At the planning level, **automated inventory and stock management** follows closely behind at 85%. These systems provide insights into supply levels, reduce waste, and optimize procurement. At execution, **networked kitchen equipment** delivers substantial benefits for 78% of users. Connected appliances enable performance and energy monitoring and cut downtime through remote diagnostics, automatic alerts and energy dashboards.

Kitchen operators who have not yet adopted digital applications expect the most from customer-facing systems and workforce management. Digital ordering systems and personnel management tools are the **most anticipated applications,** each expected to deliver significant benefits by 52% of non-adopters. Digital ordering aligns with evolving guest preferences for flexible and convenient service. Personnel management tools address skilled worker shortages by optimizing labor allocation, stream-

> Connected kitchen equipment delivers benefits for **78%** of users: Real-time performance monitoring, remote diagnostics, and automatic alerts reduce downtime and energy waste. This way, kitchen operators can maintain efficiency even with smaller teams.

How Restaurant Kitchens Benefit from Increasingly Going Digital
Substantial benefits of digital applications[1]



[1] Only respondents who have introduced at least one system, Graphic shows selected responses.
Source: Online-survey conducted by Statista on behalf of RATIONAL (Q4/2025)

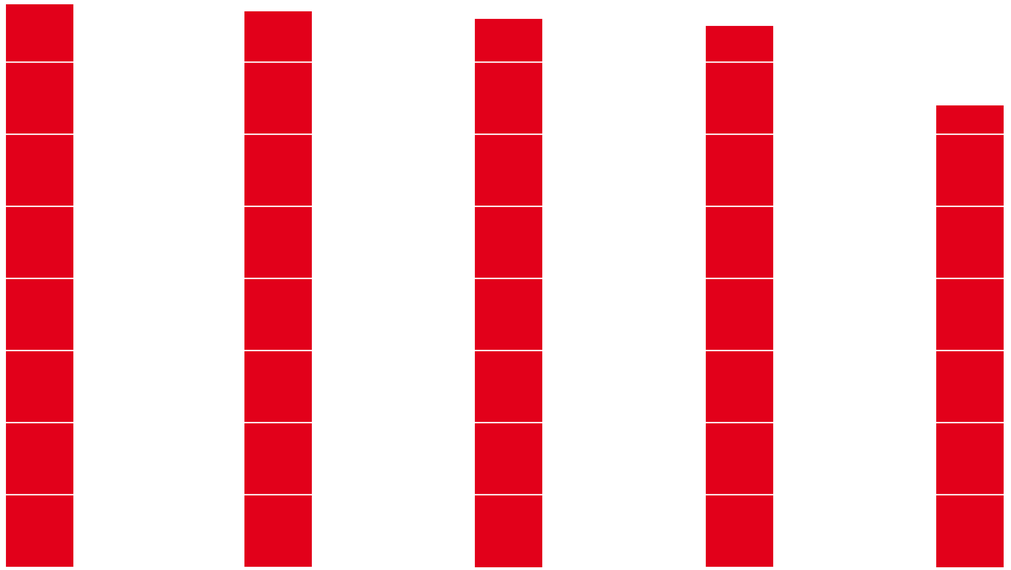
Outlook and conclusion

Strategies for Future Resilience

Kitchen Operators Prepare for Long-Term Transformation

Future-Ready: Planned Investments in the Next 12 Months

Kitchen operators plan to invest in people and technology[1]



78% Kitchen technology modernization

77% Trainings and development programs

76% Expanded food safety measures

75% Energy-efficient appliances

64% Automated cooking or production processes

Focus on technology and workforce: Over the coming year, kitchen operators are planning **substantial investments** that signal a shift from reactive problem-solving to proactive transformation.

Kitchen **technology modernization** leads planned investments, with 78% of operators prioritizing this area. This commitment to technological advancement is strongest in the United Kingdom and Germany (each 86%). Modern equipment improves consistency, reduces labor intensity, and enables more sophisticated execution – directly addressing workforce shortages, quality maintenance and operational efficiency. Closely related, **process automation** represents another investment priority for 64% of surveyed kitchen operators. Automating preparation and repetitive tasks eases strain on employees and ensures consistent results. The United Kingdom again leads at 82%, suggesting particularly strong appetite for technological solutions to address workforce shortages while maintaining quality.

75% of respondents plan to invest in **energy-efficient appliances,** a strategic response to the rising energy costs operators identified as a primary concern. These investments aim to deliver both environmental benefits and long-term cost savings, aligning operational necessity with sustainability commitments.

Employee development measures also rank high: 77% plan to invest in **training and development programs.** This emphasis on workforce development complements technological investments and addresses skilled worker challenges by strengthening existing teams and improving retention prospects.

These planned investments demonstrate strategic orientation toward technology and workforce development. The challenge ahead: translating ambitious plans into operational reality. While execution challenges remain, the breadth and consistency of investment commitment across regions suggest the industry is positioned for meaningful transformation in the years ahead.

[1] Major/minor investments planned. Graphic shows selected responses.
Source: Online-survey conducted by Statista on behalf of RATIONAL (Q4/2025)

Methodology

Cross-Market Survey of Kitchen Operations

The Kitchen Barometer 2026 explores the state of restaurant and hotel kitchens, examining operational challenges, strategic priorities, and transformation pathways shaping the industry. It addresses cost pressures, workforce constraints, guest expectations, technology adoption, and quality assurance measures.

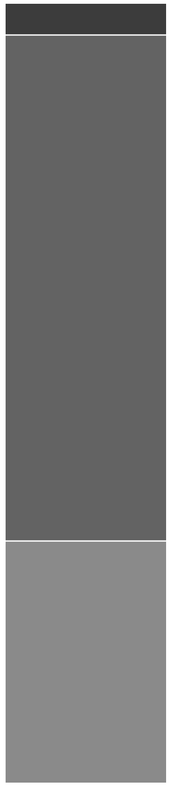
The analysis is based on an quantitative survey conducted by Statista for RATIONAL in September 2025. The survey gathered insights from **250 kitchen operators across five markets: Germany, Japan, France, the United Kingdom, and the United States,** with 50 respondents from each country.

Respondents represent **multi-location operations,** with 65% managing two to five branches or locations, 31% operating six to ten locations, and 4% managing single-location businesses. **Daily meal volumes** vary: 38% serve 200 to 500 meals per location daily, 32% serve 100 to 200 meals, 14% serve 500 to 1,000 meals, while 12% prepare fewer than 100 meals and 3% exceed 1,000 daily meals.

The survey captured **perspectives across organizational levels**. Half of respondents (50%) work in restaurant or hotel management, 28% hold executive management positions, 16% are in kitchen management, and 6% work in purchasing. This distribution ensures representation from strategic decision-makers and operational leaders responsible for daily kitchen operations.

Quantitative Survey Among Decision-Makers in Restaurants and Hotel Kitchen Operations

Branches or locations per business

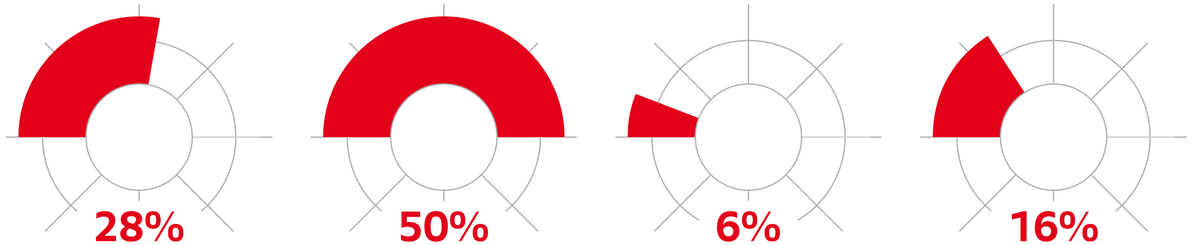


4%
One branch/ location

65%
2–5 branches/ locations

31%
6–10 branches/ locations

Respondents' primary area of work



28%
Executive management

50%
Restaurant/hotel management

6%
Purchasing

16%
Kitchen management

Daily meals per location



12%
Less than 100

32%
100 – 200

38%
200 – 500

14%
500 – 1,000

3%
More than 1,000

Source: Online-survey conducted by Statista on behalf of RATIONAL (Q4/2025)


RATIONAL