

Study: Growth Drivers in the K-12 Foodservice Segment

Most U.S. K-12 schools offer on-site meals to their students. Many receive federal reimbursements for these meals through their participation in the USDA's Child Nutrition Program such as the National School Lunch Program (NSLP) and the School Breakfast Program (SBP). Child Nutrition Programs are available to all students regardless of income, however students from lower-income households may qualify for free or reduced-price meals and/or snacks.

For suppliers, this K-12 segment offers many attractive features. First of all, the K-12 foodservice market is large - \$18 billion in 2025. Secondly, this segment is expected to experience real growth over the next 5 years. Thirdly, nutritional guidelines for school meal programs are constantly influx and suppliers can differentiate in supporting school operators in meeting these state and district mandates to receive federal funding.

This proposed engagement document is a working draft that will be refined with study sponsors.

Engagement Objectives

This comprehensive, multi-client study on K-12 foodservice provides the benefits of a shared-cost research approach, which enables maximum coverage of common interest topics as well as reporting of proprietary sponsor questions and issues.

- • Bring to light foodservice growth trends and drivers in U.S. K-12 schools
- • Market segmentation and differentiation between public and private institutions
- • Deliver dynamics and trends related to different service areas/systems
- • Identify critical issues faced by K-12 institutions and how these impact foodservice
- • Forecast how the K-12 foodservice market will evolve through 2028
- • Identify key growth opportunities, anticipated challenges/hurdles and critical success factors for manufacturers who participate in the K-12 foodservice market

Other Issues Addressed

- • Understanding of the decision-making process related to what foods are offered in the school foodservice program
- • Identification of critical selection criteria when deciding which foods to offer, and an understanding of where beef fits on meeting these criteria
- • Identification of key decision makers and influencers, their degree of influence and their key 'hot buttons'
- • Exploration of how the school foodservice program is viewed among educators, students, and the community
- • Evaluation of how specific products are perceived in the school foodservice environment - benefits and drawbacks

- • Understanding and evaluate how food and beverages are positioned in the 'good food' vs. 'bad food' context
- • Assessment of health and nutrition perceptions and misperceptions of food and beverage categories
- • Understanding of the nutritional and health programs that are being utilized within the school foodservice area, including menu development, and promotions, and how beef fits in with these programs
- • Evaluation of nutritional education held by foodservice directors, and how this is practiced
- • Discussion of the opportunities and obstacles to menuing within the school foodservice area
- • Recommendations of how sponsors can enhance the position of specific products and expand within the K-12 school foodservice environment.

Scope of Coverage

- • Public and Private
- • Elementary (K-5), middle (6-8) and secondary (9-12) grade levels
- • Self-operated and contract-managed

Study Approach

Activity	Description	Objective(s)
Engagement initiation	<ul style="list-style-type: none"> • Review proposal • Proprietary requests 	<ul style="list-style-type: none"> • Agree on timing, key dates. • Evaluate introductory interview guides. • Sponsors can help spearhead questions.
Existing Data Review	<ul style="list-style-type: none"> • Exhaustive review of available information 	<ul style="list-style-type: none"> • Gather intelligence prior to going to the field.
K-12 Operator Research	<ul style="list-style-type: none"> • Qualitative interviews with 25 foodservice directors in large US school districts. • Structured, online survey research with 200 foodservice directors to quantify attitudes, practices and behaviors. 	<ul style="list-style-type: none"> • Understand operator issues, preferences and plans. • Develop penetration and usage estimates and individual sponsor category information.
Analysis and Report Delivery	<ul style="list-style-type: none"> • Report content will include common-interest and proprietary sections 	<ul style="list-style-type: none"> • Provide a presentation and recommendations for how to leverage the opportunities within the K-12 foodservice channel.



Foodservice IP's Experience

The Foodservice IP team dedicated to this project will be headed by Tim Powell, Managing Principal and Jenny Anderson.

Timing and Fees

Foodservice IP anticipates it will require 8-10 weeks to complete this study. The program will be launched in 2026. A formal timetable will be issued shortly after initiation. Prelaunch sponsors will be on a steering committee and have the ability to help further define study objectives.

- \$15,000 per study (per sponsor), exclusive of travel for private presentations.
- Discounted multi-study participation: two studies for \$26,500 or three studies for \$35,000, when confirmed in advance or together with the first sponsorship.

Our billing policy is as follows:

- • 50% upon project initiation
- • Balance due upon submission of final report