

Deep Dive on Emerging E-Commerce Platforms (Cut+Dry, Pepper) #12731

Primary Objective

To assess how emerging digital distributor platforms (such as Cut+Dry and Pepper) are influencing the operator–distributor relationship, particularly among independent restaurants and small chains. This research will equip sponsors with insights on how these platforms impact distributor sales rep dynamics, operator purchasing behavior, and ultimately how manufacturers can best engage with operators in a changing landscape.

It will also benchmark emerging third-party platforms (e.g., Cut+Dry, Pepper) against major broadliner e-commerce systems (e.g., Sysco, US Foods, GFS, Dot) to understand differences in user experience, adoption, and integration into the operator workflow.

Key Issues to Explore (Preliminary)

- **Benchmarking Against Peers:** How far along is a sponsor company compared to its peers? How does adoption differ by category (e.g., proteins vs. disposables vs. center-of-plate)?
- **DSR Role Evolution:** How are platforms like Cut+Dry and Pepper reshaping the role of distributor sales reps? Are they still the primary point of influence, or more of a reference resource?
- **Independent Operator Adoption:** Are these platforms gaining traction among independent restaurants and small chains? What motivates adoption versus resistance?
- **Impact on Purchasing Behavior:** Do operators purchase differently through e-commerce platforms (e.g., order size, frequency, product mix)?
- **Manufacturer Access:** How does this shift affect how manufacturers like can communicate with and influence operators who may be further removed from traditional DSR interaction?
- **Trust and Relationships:** Does digital ordering enhance or weaken the relationship between operators, distributors, and manufacturers?
- **Competitive Dynamics:** How do platforms position themselves relative to distributor ordering portals (Sysco, US Foods, regional distributors)? Are they complementary or disruptive?
- **Broadliner vs. 3P Comparison:** How do operator experiences differ between traditional distributor portals (Sysco, US Foods, GFS, Dot) and third-party platforms (Cut+Dry, Pepper)? What are the relative advantages, friction points, and preferred use cases from an operator's perspective?
- **Future Outlook:** What is the likely pace of adoption, and how might this influence the broader foodservice distribution model?

Proposed Approach

1. Immersion and Kickoff

Foodservice IP will meet with each sponsor to receive their “wish” list and gather as much information on the segments, products and key questions required. The fieldwork will reflect these needs. Proprietary requests are also discussed at this point and a formal timeline is issued.

2. Secondary Research Deep Dive

Review of publicly available material, trade press, company websites, and industry commentary on Cut+Dry, Pepper, and similar platforms. Assessment of adoption patterns, funding/scale, and positioning relative to traditional distributor portals.

3. Survey Development

Design of a structured discussion guide targeting operators outside the Top 100 chains, tailored to the key issues above and sponsor priorities. Guide will include areas such as usage experience, ordering patterns, impact on supplier relationships, and openness to manufacturer engagement. Sponsors will have full control to add as many questions it deems important.

4. Primary Research

- Conduct **200 operator surveys** (independent restaurants and small chains, others as determined by sponsors) who use these platforms or are evaluating them. Capture qualitative insights on operator behaviors, perceptions, and future intentions
- 15 Manufacturer Interviews: Mid-size and category-diverse suppliers involved in or evaluating these platforms. Explore stages of adoption and lessons learned.
- 15–20 Distributor Interviews: Regional and national distributor reps—including Sysco, US Foods, GFS, and Dot—to assess platform positioning, operator adoption, and impact on sales roles..
- Interviews with digital platform companies.

5. Deliverables

- A comprehensive report (PowerPoint + executive summary) synthesizing secondary and primary findings.
- Platform Scorecards: Side-by-side evaluations of Cut+Dry, Pepper, and emerging players on reach, functionality, and ROI.
- Strategic implications and recommendations for each sponsor.

Timing and Fees

- Estimated project duration: 10-12 weeks from initiation.
- Target launch: Late 4Q 2025, delivery late 1Q 2026



- Pre-launch sponsors will join a steering committee to help shape 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.
- **Foodservice IP can invoice the first half in Jan. 2026.