

2026 UPDATE

SELLING TO OFFSITE CENTRAL KITCHENS

BACKGROUND

A central kitchen – also known as a commissary kitchen – is an internal facility that supplies restaurant branches under a single business with ingredients or items that will be used or sold at each location. In our 2026 study update of Selling to Offsite Central Kitchens, an additional focus will be on owners of central kitchens who also rent out their space to emerging businesses, food trucks, mobile food carts, and smaller restaurants that don't have space to store and prep large quantities of food. Foodservice IP (FSIP) will update our landmark 2017, 2020, 2022 and 2024 studies to reflect the rapid changes that have occurred in this channel with the explosion of delivery since that period.

OBJECTIVES

- **Help manufacturers identify, target and sell to offsite central kitchens serving select restaurant segments, retail foodservice and onsite foodservice.**
- **Provide a growth avenue outside of traditional supply-chain channels**
- **Identify local, regional and national third-party kitchens**
- **Profile top offsite, independent central kitchens for selling activities**

APPROACH

- **Existing data review:** thorough assessment of key industry information for deep contextual perspectives on market dynamics.
- **In-depth original research:** 100 interviews with major c-store, supermarket, general retail chains, and select noncommercial and QSR operators; 10-15 interviews with foodservice executives at corporate headquarters; 20-25 interviews offsite central kitchen owners, senior management, sales executives and other relevant functional areas.
- **Strategic analysis:** robust PowerPoint report with clear implications and next-step guidance.

NEXT STEPS

To purchase FSIP's 2026 update of **Selling to Offsite Central Kitchens** study, please complete the agreement on the following page or contact:

TIM POWELL

Managing Principal
312.600.5131
tpowell@foodserviceip.com

GREG HOBBY

Director, Business Development
502.376.5426
ghobby@foodserviceip.com

SCOPE

- **Segment coverage** includes drug stores, convenience stores, supermarkets and "other" retailers, including club stores and general merchandise stores, such as Target and Walmart, plus some QSRs and select noncommercial operators.
- **Product coverage** includes dispensed hot and cold beverages, Bottled/packaged beverages, Sandwiches (wraps, burgers, deli), Pizza, Sides/bites, Prepared salads, Fresh-cut fruit, Soups, Yogurt parfait, Baked goods, Dessert, Disposable/ takeout packaging/ Foodservice equipment
- What drives adoption of **in-house vs. third-party central kitchens**
- Criteria for **product selection and production**
- **Benefits, drawbacks, and share of purchases** flowing through central kitchens —and how this will evolve
- **Leading central kitchens** and the roles of national vs. regional players
- **Receiving, distribution, structure, and decision-making** within central kitchens
- **Supplier selection**, best-in-class partners, and success factors
- **Distributor importance** and cross-segment reach (e.g., healthcare, vending)
- How retailers utilize and merchandise **prepared and grab-and-go foods**
- **Margin structure** and key **product selection criteria**

FSIP's RESEARCH ADVANTAGE

- Comprehensive analysis from experienced consultants exclusively focused on the food industry
- Value-priced intelligence that answers the "so what" and "what now"
- Truly strategic guidance tailored to your business needs

TABLE OF CONTENTS

2026 Update Selling to Offsite Central Kitchens

Table of Contents

INTRODUCTION

Background & Objectives
Notable Differences Since Recent FSIP Commissary Studies
Approach
Notes on Project Scope & Methodology for Operator Survey

KEY FINDINGS & RECOMMENDATIONS

Executive Summary
Top 10 Findings & Implications

PRIORITY FOCUS AREAS & ACTION PLAN

Execution, Not Branding
Products for Multi-Commissary Use
Par-Baked, Fully Cooked & Finish-Only Formats
Innovation Enabler, Not Idea Owner
Seek Structural Reliance on Commissaries
Offer Aid for Delivery & Speed
Sell to Commissaries as Customers, Not Channels
Commissary Sales Playbook

CHANNEL DETAILS

Commissary vs Co-Man vs Manufacturer: Terminology Views From the Entities Themselves
A Practical Way to Segment Commissaries (Based on How They Actually Operate)
Estimated Commissary Purchases by Channel
Estimated Commissary Purchases by Prepared Food Category (2026)
Representative Commissary Operators Included in the Research

OPERATOR RESEARCH & INSIGHTS

Use of Commissaries for Prepared, Grab-and-Go Foods by Operator Segment
Level of Preparation Performed by Commissaries Before Products Reach the Store
Primary Role of the Commissary in Supporting Food Programs
Use of Multiple Commissaries by Operator Segment
Prepared Food Categories Prioritized for Growth Over the Next 2–3 Years
Brands and Labels Consumers See by Category
Share of Prepared Foods Sourced from Commissaries (Mean Estimates)
Services Provided by the Commissary
Criteria for Selecting Commissaries

OPERATOR RESEARCH & INSIGHTS (cont.)

Performance Ratings of Commissaries
Commissary Role in Innovation
National Brand Importance to Operators

COMMISSARY VIEWPOINTS

How Commissaries View Their Business
Primary Levels of Processing
Commissary Operating Models
Commissary Share of Total Business
Where Commissaries Are Seeing Growth
Growth Priorities: Concentrated Where Commissaries Already Carry Meaningful Volume
How Commissaries Source Food, Beverage and Ingredients
Commissary Packaging and Logistics
How Commissaries Discover, Evaluate & Select Manufacturer Partners
Role of National Brands and How Purchase Decisions Are Made
What Commissaries Want Manufacturers to Do Better

COMMISSARY LISTINGS (SEPARATE COVER ~ 150 PROFILED)

Segments Served (Standardized)
Operational Model & Role
Product Formats & Processing Capabilities
Customer & Channel Mix
Segment Exposure & Growth Signals
Category Focus Areas
Scale & Multi-Site Capability
Sourcing & Partnership Approach
Key Accounts (Selective)

Thank you for your business!