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Research of Development Trends of the Russian Public Catering Market in Interrelation with Agribusiness

Maria Kolgan [a], Yulia Medvedeva [b], Darya Kabakova [c]
Don State Technical University, 1 Gagarin Square, Rostov-on-Don, 344000, Russia
jjmedvet@yandex.ru

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Abstract : The article examines the development trends of the Russian catering market and its relationship with agribusiness. The work analyzes the current situation on the market, identifies the main problems and development prospects, and offers recommendations for optimizing the interaction between catering and agribusiness. As a result of the study, the main formats of catering and the ways of their interaction with the agri-food sector were identified. Fast food is focused on the mass consumer and actively uses local supplies to reduce costs and ensure the freshness of products. Local purchases require farmers to meet strict specifications, which can be difficult for small farms. The interaction between catering and agribusiness has the potential to optimize logistics processes and improve product quality.

[a] https://orcid.org/0000-0002-4310-0306
[b] https://orcid.org/0000-0002-5835-0594
[c] https://orcid.org/0009-0006-9427-8266

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1 INTRODUCTION

The Russian catering market in 2025 is going through a stage of profound transformations closely related not only to economic and political conditions, but also to the state of the agricultural sector. Deliveries of local agricultural products, cooperation between farmers and restaurants, the development of the " farm - to - table " concept (from the garden - straight to the table) are becoming important factors in the competitiveness and sustainability of the restaurant business.

On the one hand, the market is affected by the general macroeconomic situation: increased inflation, adjustments in consumer demand, changes in logistics chains and continued sanctions pressure. On the other hand, the catering sector is forced to adapt to new safety and environmental requirements, as well as to the specifics of local raw material markets, from vegetables and fruits to meat and dairy products.

In the current conditions, the role of domestic agricultural producers continues to grow, who, using government support measures and new distribution channels, are integrating into the supply system for restaurants, cafes and delivery services. For many regions, this trend means expanding the capabilities of agricultural enterprises, the emergence of new forms of cooperation and a positive impact on the economy as a whole.

This article is a scientific study aimed at identifying trends underlying the interaction of the public catering market and agriculture. It is based on the materials of the bulletin "The Public Catering Market of the Russian Federation" for the period from February 21, 2025 to February 26, 2025, additional industry reports, as well as publications in leading Russian media. The work is aimed at deepening the understanding of the essence of the integration of the two industries and its prospects.

2 MATERIALS AND METHODS

The number of studies on the transformation of the agribusiness sector in developing and developed countries is growing, with most journals expanding their coverage to include changes in the food supply sector.

The main objective of the work is to identify and systematize the trends that determine the state and prospects of the Russian catering market in 2025, with a special emphasis on its connections with agriculture. To achieve this goal, it is necessary to solve the following tasks: analyze the macroeconomic conditions that influenced the dynamics of the catering market and agricultural sector in 2024-2025; identify the leading segments of the catering market, their current state, as well as significant channels for supplying agricultural products; study the impact of inflation and price fluctuations for agricultural resources (raw materials, feed, seeds) on the cost and profitability of catering establishments; assess the role of government regulation and support measures in relation to both agribusiness and the restaurant industry; analyze marketing tools and strategies that can strengthen ties between restaurants and local agricultural producers; formulate conclusions and recommendations for further development of the market, taking into account the prospects for farmers and restaurateurs.

3 RESULTS

Macroeconomic conditions for the development of the public catering market and the agricultural sector in 2025

A number of macroeconomic conditions can be identified that will influence the dynamics of the public catering market and the agricultural sector in 2024–2025

1. Inflationary processes and impact on agricultural chains.

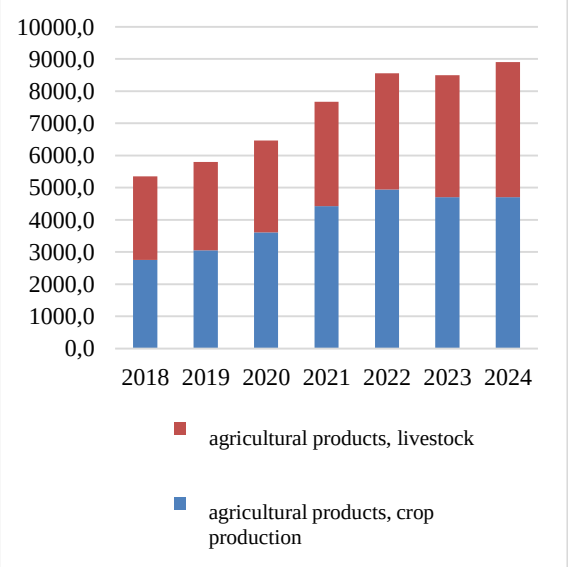

Fig ure 1: Agricultural output by farm category in the Russian Federation at current prices; billion rubles; (data

source: Federal State Statistics Service of the Russian Federation, https://rosstat.gov.ru/enterprise_economy).

According to estimates by the Ministry of Economic Development, inflation in 2025 could reach 7–8%, which is reflected not only in prices for end consumers, but also in the raw material costs of restaurants. For the agricultural sector, the increase in prices affected:

Seeds and fertilizers: the rise in prices for mineral fertilizers in 2024–2025 directly affects the cost of vegetables, grains and industrial crops.

Feed: The increase in the cost of feed is reflected in the prices of meat and milk supplied to restaurants and cafes.

Transportation: Increased costs for fuel and logistics lead to an increase in the final price of agricultural products.

As Russian restaurants strive to use local raw materials more often (thereby supporting the concept of import substitution and satisfying consumer demand for “natural products”), price changes in the agricultural sector directly affect the profitability of establishments and their ability to maintain competitive prices.

Two key sectors – agriculture and the catering sector – received a number of government support measures, which had an uneven impact on their development.

For the agricultural sector – subsidies for the purchase of equipment (including greenhouse equipment), grants for the development of family livestock farms, preferential loans for small and medium-sized agribusinesses.

For the public catering sector – SME lending programs with partial funding from the federal budget; tax breaks for companies working with local producers; support for rural cooperatives that supply products to local restaurants.

Figures 2 and 3 show the dynamics of turnover of public catering establishments in Russia and its size per capita according to data from the state statistics service.

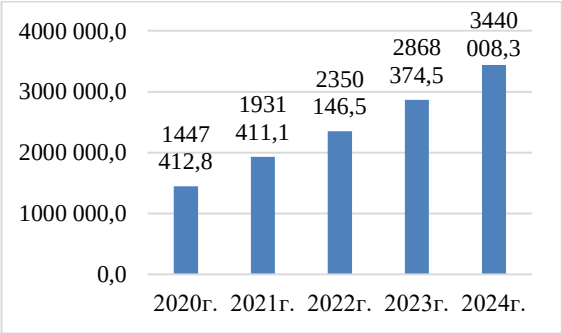

Figure 2: Turnover of public catering in the Russian Federation, million rubles (data source: Federal State Statistics Service of the Russian Federation, https://rosstat.gov.ru/statistics/roznichnayatorgovlya).

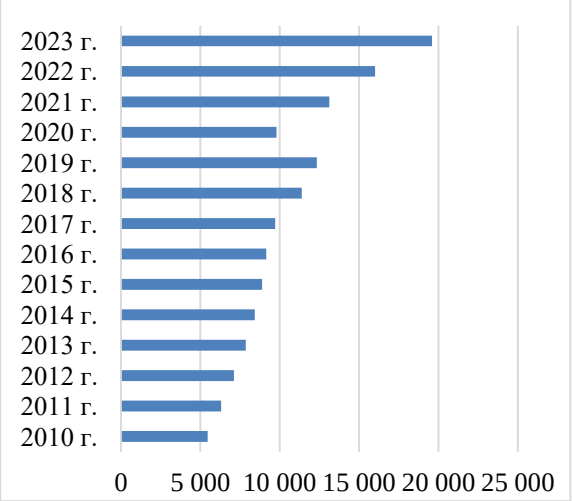

Figure 3: Public catering turnover per capita in the Russian Federation, rubles (data source: Federal State Statistics Service of the Russian Federation, https://rosstat.gov.ru/statistics/roznichnayatorgovlya).

The turnover of public catering per capita in the Russian Federation has demonstrated steady growth over the past 13 years. The structure of consumer preferences is also changing. Consumers are increasingly focusing on environmental friendliness, naturalness and "transparency" of supply chains. The concept of " farm - to - table " is popular, implying a minimum distance between the field and the restaurant table:

1. Increased trust in local producers: guests want to see the following labels on the menu: “Products from regional farmers” and “Organic vegetables”.
2. Environmental standards: restaurants choose packaging, logistics and waste disposal methods that comply with the principles of responsible consumption.
3. Gastronomic tourism: the demand for authentic dishes from local ingredients makes regional farms full-fledged participants in tourism clusters .

Segmental analysis of the catering market and its cooperation with agriculture

Differentiation of individual segments of the Russian public catering market occurs within the framework of the value approach, which is

promising and the most dynamically developing in the theory of marketing management.

The Russian catering market is still divided into several main areas: fast food , fast casual , coffee shops, food halls, casual dining , etc. Each segment has its own approaches to cooperation with farmers, its own level of dependence on prices for agricultural products and the scale of use of local supplies. Let's consider each segment separately.

The fast food segment is focused on the mass consumer, sensitive to price. At the same time, leading chains (including domestic ones that have replaced the departed Western brands) are actively building supply channels for meat, vegetables and bakery products from local agricultural enterprises.

Traditionally, the advantage of local purchases is the reduction of logistics costs, ensuring freshness and speed of delivery. At the same time, the difficulties of such interaction are also highlighted: high standards of chains for unification of taste and quality require farmers to comply with uniform specifications (size, weight, protein content in meat, etc.) . Thus, "Vkusno - and period" (former McDonald 's) continues to expand bases and warehouses for its own needs (as in the Rostov region), which has a positive effect on the region, stimulating local agricultural producers to increase the volume of supplies.

Fast format casual combines speed of service and higher quality of food, often with an emphasis on healthy eating. The connection with the agricultural sector is manifested through the following mechanisms: purchases of farm products (salads, fresh vegetables) dairy products directly from small farms; restaurateurs try cooperation with farmers for seasonal innovations (for example, mini-farms growing lettuce, greens or berries); integration into marketing - mention of specific farms, brands of craft cheeses, farm meat - additional value for guests.

Some chains (Perchini, Khochu Puri) are expanding their range of dishes with local ingredients, emphasizing the freshness and authenticity of the recipes.

Coffee shops in most cases are limitedly dependent on local coffee suppliers (the beans are a product of mainly imported origin). However, the expansion of the range of baked goods, desserts, and dairy products provides an opportunity for cooperation with regional bakeries and cheese dairies. Thus, the use of local farm milk provides coffee shops with a stable supply of high-quality milk for cappuccino and latte. The use of farm cottage cheese, seasonal berries, and honey improves the quality of baked goods and desserts.

As part of the ustainable approach, coffee shops try to implement the principles of “green” marketing - using reusable or biodegradable cups, emphasizing concern for the environment.

Shokoladnitsa, Cofix , Stars chains Coffee and local coffee shops actively attract additional traffic through seasonal special offers and create an image of responsible partners for small agricultural enterprises engaged in processing (milk, sweet fillings, confectionery bases).

Food halls often operate as small points with signature cuisine, which can be based on local products. The multi-concept format allows customers to try dishes from different regions and cuisines in one place. Many operators in the segment in large cities (Moscow, St. Petersburg, Kazan, Krasnodar) invite local farms to participate in tastings and sales of related products (cheeses, sauces, jams). At the same time, the possibility of direct contact is realized: farmers often work as residents of food halls (mini-shops), selling both products and ready-made meals. It is worth noting that for some regional farms, food halls become an experimental platform for entering the market of a large city. The " farm - to - table " trend is most pronounced in this segment .

Full-service restaurants focus on the quality of ingredients and seasonality: updating the offer depending on the harvest (asparagus in the spring, berries and vegetables in the summer, pumpkin and root vegetables in the fall). Famous restaurateurs (for example, Arkady Novikov) willingly introduce regional products, local fish delicacies, and farm meat. The importance of Russian wines, including Crimean, Kuban, and Stavropol wines, is growing for wine lists. The reduction in import supplies has stimulated the development of domestic winemaking, which supports local grape producers.

The segment thus gravitates towards the closest ties with agribusiness, and its success depends on the stability of agricultural supplies and the quality of raw materials.

e - grocery services encourages a number of farmers to connect directly to aggregators, bypassing classic wholesale channels. But restaurants also use these platforms to promote “ready-made food sets” or “gastronomic boxes” based on regional raw materials.

The most common formats are " Dark kitchens ”, specializing in dishes made from local products, emphasizing freshness and healthiness in the advertising campaign” and courier services –

support for small farms is possible if logistics ensure fast delivery of farm products around the city.

Marketing strategies and tools in the context of agricultural interdependence

In the context of consumer behavior transformation, many restaurants and cafes are implementing discount and promotion mechanisms, but complementing them with a local "story"; this technology is promotional marketing with an emphasis on farm-grown raw materials. Seasonal menus with local products: attracting guests with discounts on dishes made from local vegetables during the season of their active collection. Combo sets: profitable lunches that include products from specific farmers (for example, a salad with goat cheese from a regional cheese factory and a dessert made from local berries). "Farmer's Day": a separate promotional event when the entire menu or part of it consists only of local agricultural products, and prices on this day are lower than usual.

High inflation encourages establishments to look for additional arguments for the client. One of the key arguments is high-quality domestic products. Emphasis should be placed on differentiation and the formation of a unique selling proposition (USP)

The USP can be formed on the basis of the "original region". The restaurant can specialize in the cuisine of a specific region (e.g. Tatar, Caucasian, Far Eastern), using ingredients only from there.

USP based on the ustainable approach. The absence of GMOs and minimal use of chemical fertilizers are emphasized. The essence is healthy nutrition based on local natural raw materials.

USP in the direction of culinary collaborations. Restauranteurs invite farmers to master classes, organize fairs and presentations on their site. This creates the effect of "live" participation of the agricultural producer in the restaurant brand.

With the development of omnichannel technologies, tools that allow tracking the product's path to the guest's table have become popular. Here we can use digital marketing technologies and tools, tracking the origin of raw materials and loyalty programs. QR codes are used to track the path of products: the menu may contain a QR code that leads to a page with information about the farm where the meat or vegetables were grown.

Development of the SMM campaign: restaurants publish “stories” and posts from trips to farms, showing the “honest” conditions of keeping animals and growing plants.

Development of a specific loyalty program: guests who regularly choose “farm category” dishes are awarded additional bonuses or discounts.

Such approaches increase trust in quality and encourage repeat visits, especially from conscious, healthy-minded consumers.

The development of public catering in the regions of Russia today is closely connected with the prospects of agrotourism – travelers are looking for authentic dishes and want to get acquainted with the technology of food production on the spot. This opens up new opportunities for farmers and restaurateurs, examples of such clusters can be seen in the following cities:

Kazan: Along with the development of hotel infrastructure, the number of restaurants integrating Tatar local products into their menus is growing. Yandex Food has released a guide to the best restaurants, emphasizing their close ties with the agricultural regions of the republic.

Novosibirsk: there is high activity in the market for buying and selling cafes and restaurants. Some establishments are closing, others are taking up cooperation with regional farms, hoping for consumer demand for fresh produce.

Krasnodar: meetings of local restaurateurs and representatives of the agricultural sector are held, joint programs for promoting Kuban cuisine and products (vegetables, meat, wine) are discussed.

The synergy effect is particularly noticeable in resort and historical areas, where gastronomic tourism directly influences local agriculture, stimulating the expansion of the range and improvement of the quality of products.

It is also possible to track the impact of brand movements, their departure and return on local farmers. The mass departure of Western restaurant chains in 2022 created new niches for Russian entrepreneurs and agricultural producers. In 2025, some foreign companies are discussing the possibility of returning, but the government is seeking to preserve certain advantages for domestic producers.

Potential benefits: Returning Western chains could restore previous procurement chains, including from rural areas of Russia, or establish new ones if local farmers offer competitive terms.

Risks for the agricultural sector: large international players impose strict quality standards, which may be a problem for some farms. However, if farmers are ready for such standards, the emergence of large foreign customers will bring significant benefits.

In any case, the departure and hypothetical return of international networks is a test of strength for Russian farmers: some were able to quickly occupy the vacated niches (suppliers of beef, chicken, dairy products), while others are experiencing difficulties due to insufficient modernization of production.

Inflation is a strong factor influencing the raw material base of the agricultural sector and restaurateurs. Traditionally, almost half of the restaurant cost price consists of food costs. Inflation in agriculture (rising prices for seeds, fertilizers, equipment) automatically increases farmers' selling prices, which is reflected in restaurant menus. Thus, a decrease in salmon catches, rising costs for feed and their transportation led to higher prices for such products. In 2024, domestic winemakers increased prices by an average of 12%, justifying this by the rise in the cost of grape raw materials and energy. With insufficient development of greenhouses and modern storage technologies, farmers cannot always ensure a stable price level all year round.

The increased cost of raw materials forces restaurateurs to optimize the menu, reduce marginal positions or replace imported products with domestic analogues. As part of partial savings, some establishments switch to seasonal purchases from several local suppliers instead of one large importer.

4 CONCLUSION

We have identified scenarios for the development of demand for local products; they can be classified into three areas:

1. Pessimistic: prolonged inflation and declining incomes, as a result of which restaurateurs focus on the cheapest raw materials, not always local, and farmers lose sales due to high prices.
2. Moderately optimistic: stabilization of macroeconomic indicators by mid-2025, growth of consumer interest in high-quality and healthy food. Cooperation with farmers reaches a higher level of support.
3. Optimistic: possible significant easing of logistics chains and an increase in state programs stimulating the development of "short chains" of supplies. Farms are actively integrating into restaurant chains through direct long-term contracts.

Here it is important to highlight the technological factors of development of the agricultural sector and restaurateurs, which include:

- modernization of greenhouse facilities: for stable year-round supplies of fresh vegetables and greens;
- development of craft production: cheese factories, breweries, wineries, meaderies - all this expands the range of products for the public catering sector;
- implementation of Big Data and digitalization: farmers are starting to use analytics solutions to forecast crop yields, and restaurants are starting to use them to manage purchasing in real time.

The Russian catering market is rapidly changing its format, focusing on the relationship with the agricultural sector, which provides stable supplies and innovative solutions in the field of raw materials. Despite macroeconomic challenges, the high flexibility and adaptability of restaurateurs to local opportunities and consumer demands indicate prospects for further growth.

Closer cooperation with agriculture contributes to:

- improving the quality of the final product;
- reduction of logistics costs;
- strengthening local economies, which is especially important for regions with agricultural specialization;
- expansion of marketing opportunities (ecotourism, gastronomic festivals, thematic tastings).

Possible horizons for future research include a more detailed analysis of the efficiency of “short chains” of supplies, an assessment of the impact of new technologies (robotics, agrodrones, artificial intelligence), and monitoring changes in the legislative framework regulating the market. It is obvious that the key to sustainable development of a restaurant in the current conditions is the ability to integrate local raw materials and relevant marketing tools, responding to the demands of consumers who want to see fresh, environmentally friendly and “historically” authentic products on their menu. Thus, a unique model of interaction between the catering market and the agricultural sector is being formed in Russia, in which difficult economic conditions become an impetus for the search for new formats of cooperation, creative marketing solutions and a positive impact on the local economy.

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