CULINARY
CONCEPTS AB

CULINARY CONCEPTS AB

THE CULINARY WORKFORCE REPORT

Solving for Stability in the Back of House

2026

A national workforce development organization based in Virginia.

Executive Summary

Hospitality entered 2026 with more people employed than at any point in its history and less stability than at almost any point in its history. Headcount was rebuilt. Resilience was not.

Nowhere is that gap wider than in the kitchen. Back-of-house roles remain the hardest to fill, the fastest to turn over, and the most consequential when they fail. The industry has treated this as a hiring problem for a decade. It is not. It is a supply problem, and it will not be solved by posting the same job faster.

What this report establishes

- **The cost is structural, not cyclical.** Turnover in accommodation and food service runs 70–80% annually. Replacing one front-line employee costs roughly $5,864. For most operations, the annual turnover bill exceeds net profit.
- **The kitchen is the epicenter.** Roughly 70% of U.S. restaurants report being short-staffed, with back-of-house positions the most difficult to fill. Full-service employment, where cooks and chefs work, remains hundreds of thousands of positions below pre-pandemic levels.
- **Hiring faster does not fix supply.** Time-to-fill for entry-level hospitality roles has roughly doubled. Job boards return volume, not readiness. The screening, training, and first-ninety-day risk all land on the operator.
- **Trained talent performs measurably better.** Structured, credentialed training produces candidates who arrive ready and stay longer. CCAB completers finish at 83.6% against a 79% national benchmark, and 86.7% earn a recognized industry credential against 73.6% nationally.
- **Access is the scarce asset.** The candidates operators most need are not on job boards. Reaching them requires eight years of relationships with workforce agencies, social services, community health, education, and the justice system. That network cannot be bought.

In 2026, a talent pipeline is not a recruiting expense. It is infrastructure.

Executive Letter

I started Culinary Concepts AB because I kept watching the same thing happen from two directions at once.

On one side were operators who could not keep a kitchen staffed. Good operators. People who cared about their teams and still could not stop the churn. On the other side were people who wanted the work, who would have been excellent at it, and who never got a look because they did not have the right résumé, the right network, or anyone willing to spend three weeks teaching them what a professional kitchen actually demands.

Those are not two problems. They are the same problem, viewed from either end of a broken pipeline.

Eight years and more than thirty cohorts later, the data says something I believed before I could prove it: when you recruit deliberately, screen honestly, train in a real kitchen, and stay involved after the hire, the outcomes change. Not marginally. Measurably, and above the national benchmark.

This report is our attempt to put that on the table plainly. It covers what the labor market is actually doing, why conventional hiring cannot solve it, what the evidence says about trained talent, and what our own eight years of outcomes show, including the places where our measurement is still catching up to our results.

We would rather show you a number we can stand behind than a number that flatters us. Everything in here is sourced, and where our data is thin, we say so.

The operators who will outperform in the next cycle are not the ones who hire fastest. They are the ones who stop treating talent as something you find and start treating it as something you build.

Antwon Brinson

Founder & Chief Executive Officer, Culinary Concepts AB

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01

The Labor Reality

Growth Without Stability

SECTION 01

Hospitality rebuilt headcount. It did not rebuild stability.

The industry employs more people than at any point in its history. Employment has returned to and passed pre-pandemic levels, and the National Restaurant Association projects roughly 15.8 million total employees and $1.55 trillion in sales for 2026. By the top-line measures, recovery is complete.

Underneath those numbers, the operating reality has not improved. Turnover, wage pressure, and skill scarcity persist at levels that would be considered a crisis in any other sector. What changed is that operators stopped calling it a crisis and started absorbing it as a cost of doing business.

70–80%
annual turnover in accommodation & food services

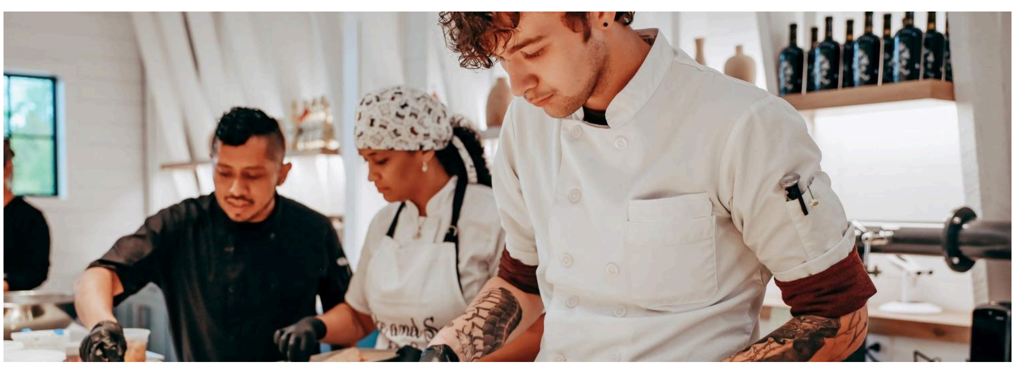
$5,864
cost to replace one front-line employee

4.8%
monthly quit rate in leisure & hospitality, vs. 2.2% nationally

A permanently higher cost structure

Wage floors have reset upward and are not coming back down. Average hourly pay in leisure and hospitality rose from $16.84 in January 2020 to roughly $22.70 by early 2025, one of the steepest wage trajectories of any U.S. industry. Insurance, food, and utilities rose alongside it.

The consequence is that labor has shifted from a variable expense to a structural cost. **When labor is structural, the lever is no longer headcount. It is productivity, and productivity depends on how prepared people are when they arrive and how long they stay.**



> **“The industry rebuilt its teams. It did not rebuild its bench.”**

SECTION 01 · CONTINUED

What turnover actually costs

Most operators can name their turnover rate. Far fewer have priced it, because the cost never appears as a single line on the P&L. It arrives distributed: as overtime, as a chef working the line instead of running the kitchen, as a menu that quietly simplifies, as a review that mentions inconsistency.

Component	What it looks like
Separation	Administrative processing, final pay, exit handling
Vacancy	Unfilled shifts, overtime for the remaining team, leadership covering the gap
Recruiting	Postings, screening hours, interviews that go nowhere, no-shows
Onboarding	Three to six weeks before a new hire reaches full productivity
Quality	Service inconsistency, slower ticket times, guest experience erosion during the ramp
Compounding	Churn accelerates churn; the remaining team absorbs the strain and begins to leave

Run the math on a ten-person kitchen. At industry-average turnover, seven to eight of those positions turn over in a year. At Cornell's replacement figure, that is **$41,000 to $47,000 annually** in replacement cost alone, before overtime, before the productivity gap, before the guest who does not come back. For a mid-size operation, unchecked turnover can consume more than net profit.

Supervisor churn is the underestimated risk

The most damaging turnover is not entry-level. It is mid-level. When a sous chef or kitchen supervisor leaves, training breaks down, standards drift, front-line turnover accelerates, and consistency becomes impossible to hold. Stable supervisors anchor a kitchen; unstable ones destabilize an entire department.

Protecting and developing those roles is among the highest-return workforce investments an operator can make. It is also the investment most often deferred, because it does not feel urgent until the person is already gone.

02

The Kitchen Is the Epicenter

Where the Shortage Concentrates

SECTION 02

Back of house is the hardest place to hire and the most expensive place to fail.

Labor pressure is not evenly distributed across an operation. It concentrates in the kitchen, and it concentrates in the roles that determine whether the food goes out consistently.

Roughly 70% of U.S. restaurants report being short-staffed, with back-of-house positions among the most difficult to fill. Full-service employment, where chefs and cooks primarily work, remains hundreds of thousands of positions below pre-pandemic levels. Experienced kitchen workers left the industry during the pandemic for jobs with better hours and less physical demand, and many have not returned.

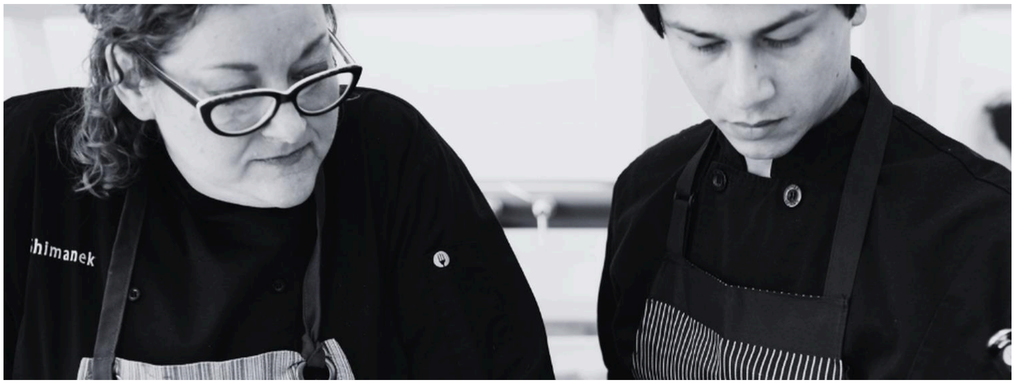
~70%	54%	6+ wks
of U.S. restaurants report being short-staffed	struggle to fill skilled back-of-house and management roles	to fill an entry-level hospitality role, up from 30–35 days

The roles that are hardest to replace are the ones closest to the plate

Shortages are most acute where judgment and consistency matter: culinary leadership, line and prep positions that carry volume, and kitchen supervision. These are exactly the roles that cannot be automated away and cannot be backfilled quickly. They rely on skill built through repetition under pressure, which no job posting can screen for and no two-day orientation can install.

The training gap makes it worse. Industry data indicates roughly three in four restaurant employees receive less than two weeks of training when they start. In a kitchen, two weeks is not enough to build competence. It is enough to build the impression that the job is chaotic, which is the leading indicator of a resignation.

SECTION 02 · CONTINUED



Supply is tightening from a second direction

The kitchen workforce has long depended disproportionately on immigrant labor. Survey work from the Culinary Institute of America and Cornell puts roughly 30% of restaurant employees nationwide as foreign-born, with substantially higher concentrations in metro markets and in back-of-house roles specifically.

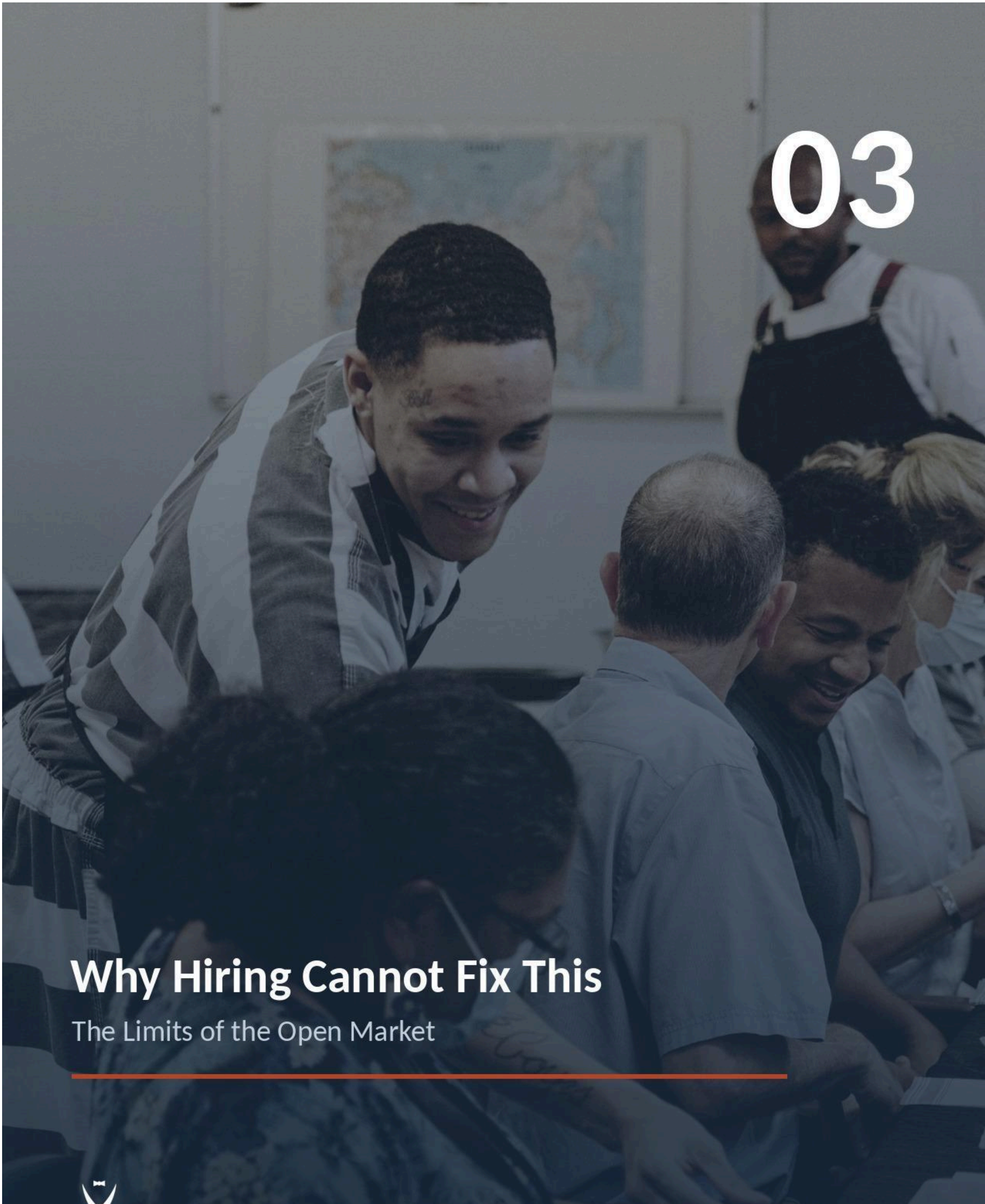
Whatever position an operator takes on immigration policy, the operational effect of a tightening pipeline is the same and it is not abstract: fewer applicants respond to postings for kitchen and prep roles, room turnover and ticket times slow, and operators cover the gap with overtime and premium pay. Margins already compressed by wage inflation compress further.

> **“Operators are not competing for candidates. They are competing for a shrinking pool of people who already know how to work a line.”**

Why this is a strategic issue, not an HR issue

In hospitality, labor is not a back-office function. It is the product. Every plate that leaves on time, every standard that holds on a Saturday night, every guest who returns depends on whether the right person was in the right station and knew what to do. When staffing falters, service quality, brand reputation, and profitability follow in that order.

That is why workforce strategy now sits on the executive agenda rather than the HR agenda. Labor efficiency, staffing stability, and retention translate directly into guest satisfaction, brand compliance, and asset value.



03

Why Hiring Cannot Fix This

The Limits of the Open Market

SECTION 03

A posting is a request. A pipeline is a supply.

The default response to a vacancy is to source harder: post more, pay a signing bonus, raise the rate, call a staffing agency. Each of these moves talent between operations. None of them adds a single prepared cook to the market.

That distinction is the whole argument. In a market where the constraint is supply rather than demand, competing for the same candidates raises everyone's cost and no one's stability.

What the open market delivers	What an operation actually needs
Applicants who saw a posting	Candidates screened for readiness and motivation
Résumés of unverified accuracy	Demonstrated competence in a working kitchen
Unknown persistence	Evidence the person finishes what they start
Training that begins on your clock	Foundational skills and food safety already in place
A transaction that ends at the offer	A relationship that continues through the first ninety days

The three failures of transactional hiring

1. **It selects on availability, not aptitude.** The people most available on a job board are, by definition, the people most recently between jobs. That is not a proxy for reliability, and screening for it properly costs manager hours the operation does not have.
2. **It transfers all preparation cost to the employer.** Every hour spent teaching knife work, station discipline, food safety, and professional conduct is an hour of skilled labor diverted from production, absorbed at the exact moment the operation is already short.
3. **It ends at the hire.** No one is accountable for whether the placement works. If the person leaves in five weeks, the cost lands entirely on the operator and the cycle restarts.

SECTION 03 · CONTINUED

The candidates who would solve this are not on the job boards

There is a substantial population of people who want kitchen careers, who have the temperament for the work, and who never reach an operator's applicant pool. They are not browsing job sites. They reach opportunity through trusted institutions: workforce boards, social service caseworkers, community health clinics, community colleges, reentry programs.

Reaching that population is not a marketing problem that can be solved with ad spend. It is a relationship problem, measured in years.

CCAB's referral network

Public workforce & economic development · City and county economic development offices, state career-services networks, regional workforce intermediaries

Social services & community organizations · Reentry and housing programs, family support services, community health clinics, TANF caseworkers, food-system nonprofits

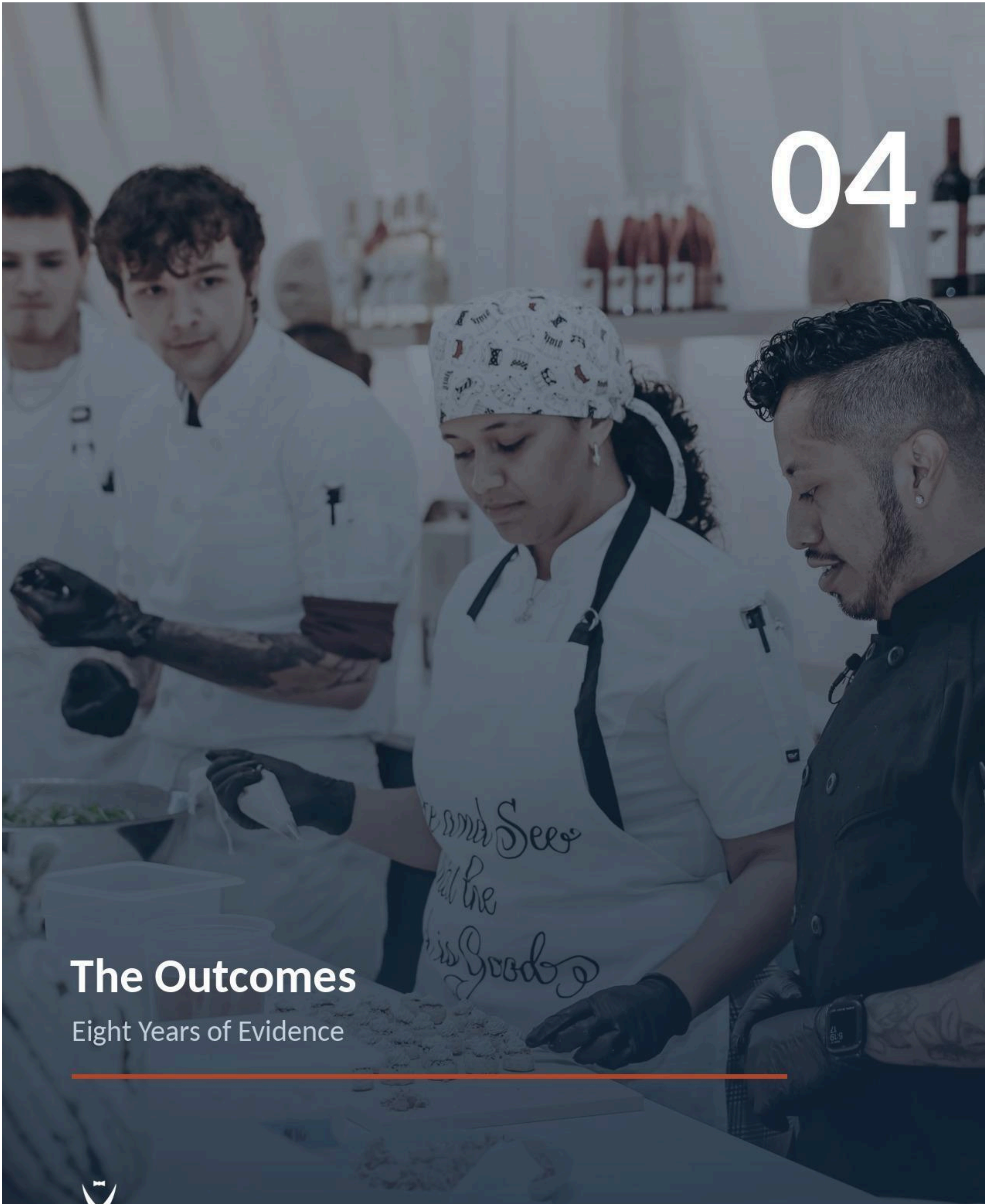
Education · Community college partnerships

Justice system · Direct delivery inside correctional facilities

Organic · Alumni referral and word of mouth, consistently our second-largest channel

Across eight years, **more than fourteen named referring organizations** send candidates to CCAB. Community partner referral is by far the largest source of applicants; paid acquisition barely registers in our data. That is the clearest evidence we have that this pipeline reaches people the open market does not.

> **“The claim is not that we have graduates. It is that we reach people you cannot reach, and then we prepare them.”**



04

The Outcomes

Eight Years of Evidence

SECTION 04

What the data shows

Culinary Concepts AB has recruited, screened, trained, credentialed, and placed hospitality talent since 2018. What follows is our own performance record, measured against the national benchmarks used in workforce development, along with a candid statement of what we do not yet measure.

83.6% program completion rate	**86.7%** of completers earn a recognized industry credential	**300+** applicants screened; roughly 1 in 3 not admitted	**30+** cohorts delivered, nearly 200 individuals served

Against the national benchmark

Measure	CCAB	National benchmark	Difference
Program completion rate	83.6%	79% — study of approximately 17,400 WIOA Title I adult participants; observed range 50–88%	+4.6 points
Industry credential attainment	86.7%	73.6% — WIOA Adult national performance, PY2024	+13.1 points

CCAB sits near the top of the observed national completion range. For an operator, the relevant reading is not the percentage. It is what the percentage represents: **a person who finished a demanding multi-week program has already demonstrated the single hardest thing to screen for in an interview, which is that they show up, repeatedly, when it is difficult.**

The credentials are portable and employer-recognized

The workforce field distinguishes sharply between a certificate of attendance and a recognized industry credential. CCAB graduates earn ServSafe certification and the American Hotel & Lodging Educational Institute's Certified Kitchen Cook credential. Both are nationally recognized, both transfer between employers, and both mean an operator's onboarding starts from a higher floor rather than from zero.

SECTION 04 · CONTINUED

Scale, consistency, and how new markets are proven

More than thirty cohorts delivered since 2018, sustained without interruption through the pandemic, serving nearly 200 individuals. That record is the argument against the most common objection to workforce partnerships, which is that they are pilots dressed up as programs.

CCAB as an organization is not a pilot. Market entry is deliberately piloted. When CCAB enters a new market, the first two cohorts run as data-collection pilots before the model is fixed for that market. We do not assume the design travels. We test it, measure it, and adapt it. Our first cohort in a second Virginia market completed at 100%.

How participation is funded, and why it matters

A portion of CCAB participants are sponsored through public workforce programs. For those participants we report against a federal performance standard, our results are externally validated, and we outperform the national average.

That subset is not the whole picture. The majority of the people we serve arrive through private pay, industry sponsorship, and local partnership. Presenting federal performance as if it described the entire program would understate our reach; presenting overall figures as if they carried federal validation would overstate our rigor. We do neither.

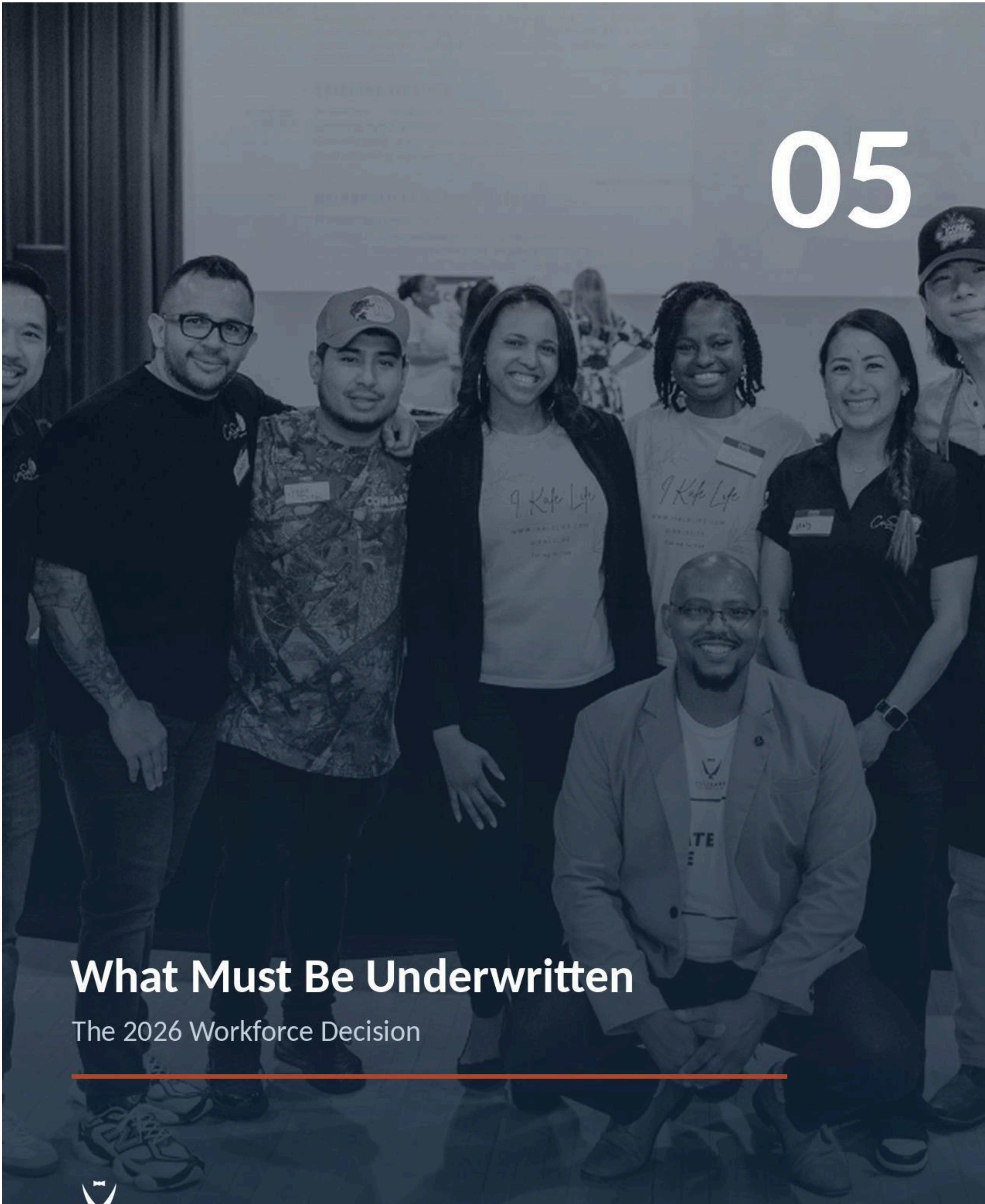
> **The honest frame:** CCAB reports to a federal standard on a minority of its participants and beats the national average on that subset, while serving a majority who come through private and industry-sponsored routes. Both facts are load-bearing. Neither is inflated by the other.

What we do not yet claim

Stating this plainly is what makes everything above credible.

Measure	Status
Post-hire retention at 30 / 60 / 90 / 180 days	Not yet systematically tracked — the top priority, and it requires employer partners
Employer turnover reduction attributable to CCAB hires	Not yet measured
Wage progression after placement	Not measurable without an exit-wage baseline; being built now
Long-term employment rate	Follow-up records are limited by contact loss, not by outcomes; the figure we can currently produce measures our follow-up infrastructure, not our program

We publish that list rather than hide it. **Those four measures are exactly what an employer partnership produces, which is the subject of the final section.**



05

What Must Be Underwritten

The 2026 Workforce Decision

SECTION 05

Budget for stability, or keep paying for instability.

Every operating plan already contains a workforce line. In most operations it is unnamed, unbudgeted, and considerably larger than anyone has calculated: it is the recurring cost of replacing the same positions, absorbed as overtime, premium pay, leadership hours, and lost consistency.

The decision in front of hospitality leadership in 2026 is not whether to spend on workforce. It is whether that spending is deliberate.

	Open-market hiring	Pipeline partnership
Who arrives	Whoever saw the posting	Screened admits from a 300+ applicant pool; roughly 1 in 3 not admitted
Readiness on day one	Unknown; trained on your clock	Hands-on kitchen training complete; ServSafe and AHLEI credentialed
Evidence of persistence	None	Completed a multi-week program at an 83.6% completion rate
Recruiting cost	Postings, screening hours, leadership time	Carried by the pipeline
After the hire	The operator is on their own	Transition support and early retention checkpoints
Cost of one turnover event	Approximately $5,864, repeated	Avoided

Four things worth building into the 2026 plan

1. **A named workforce line.** Move the cost of replacement out of overtime and into a deliberate investment. What is not named cannot be managed.
2. **A recurring source of prepared candidates.** Structured access to trained, credentialed talent, timed to your hiring calendar rather than to the moment a vacancy opens.
3. **Development for the people already on the team.** Supervisor stability is the highest-return retention investment available. Protect the bench you have while you build the one you need.
4. **Measurement that survives contact with reality.** Retention checkpoints at 30, 60, 90, and 180 days, reported back, so the investment is evaluated rather than assumed.

SECTION 05 · CONTINUED

What partnership adds that hiring cannot

The most valuable thing an employer partnership produces is not a candidate. It is a feedback loop. When an operator and a training provider share what happened after the hire, both sides get better: the operator learns what predicts success in their kitchen, and the provider adjusts what it teaches.

- **Structured retention checkpoints.** Scheduled check-ins with both the operator and the hire at 30, 60, 90, and 180 days, while there is still time to act on what they reveal.
- **Shared outcome data.** Aggregate, de-identified retention and advancement reporting back to partners, so the investment is measured rather than assumed.
- **Pipeline planning.** Cohort timing aligned to seasonal hiring, so candidates are ready when the vacancy opens rather than six weeks after.
- **Talent development for current staff.** Upskilling and leadership development that stabilizes the supervisors already anchoring the operation.

> **On confidentiality.** Proprietary information, financial details, and internal reports stay strictly between CCAB and the partner. We never use one client's data to benchmark another.

Start with a fifteen-minute conversation.

Complete the Workforce Stability Assessment at culinaryconceptsab.com/workforce-solutions. A CCAB strategist will follow up to discuss your hiring and development priorities and where your operation fits in the next cohort.

info@culinaryconceptsab.com · +1.434.218.2637

Closing Thoughts

Hospitality has entered a different operating era. Demand has normalized. Wage floors have reset permanently. Guest and brand expectations continue to climb. The one thing that has not expanded to meet those pressures is the supply of people who can do the work.

That is not a temporary imbalance. It is a structural one, and structural problems do not yield to tactical responses. An operation cannot post its way out of a supply shortage any more than it can schedule its way out of one.

What we have learned over eight years and more than thirty cohorts is that the shortage is not a shortage of people. It is a shortage of preparation, and a shortage of connection between the people who want this work and the operators who need them. Both of those are solvable. Neither is solved quickly, which is precisely why the operators who start now will be the ones with a stable kitchen in three years.

We publish our completion rate, our credential rate, and the list of things we cannot yet measure, because an industry that has been sold a great deal of confident staffing rhetoric deserves numbers it can check.

Talent is not something you find. It is something you build, and it is the last durable advantage left in this industry.

Antwon Brinson

Founder & Chief Executive Officer, Culinary Concepts AB

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About the CCAB data. Figures reflect internal program records covering more than thirty cohorts and nearly 200 individuals served, with 300-plus applicants counted across every program application instrument. Completion and credential benchmarks are drawn from WIOA Title I Adult national performance and published workforce-development research. New-market pilot cohorts are labeled as such in CCAB's internal reporting. Figures are updated annually.

CULINARY CONCEPTS AB

We train. You hire.

Culinary Concepts AB is a national workforce development organization based in Virginia and headquartered in Charlottesville. Since 2018 we have recruited, screened, trained, credentialed, and placed hospitality talent, and helped operators develop the teams they already have.

Our position is straightforward: the hospitality labor shortage is a supply problem, and supply problems are solved by building talent rather than competing for it. We do that work at scale, we measure it against national benchmarks, and we publish what we find.

Ways to work with CCAB

- **Hire from a shared pipeline.** Structured access to graduates from upcoming cohorts.
- **Build a dedicated pipeline.** A cohort recruited and trained around your operation's hiring needs.
- **Develop the team you have.** Upskilling and leadership development for current staff and supervisors.
- **Start with a diagnosis.** A continuity audit that quantifies what instability is costing your operation.

Contact

info@culinaryconceptsab.com

+1.434.218.2637

culinaryconceptsab.com/workforce-solutions

Headquarters

2041 Barracks Road

Charlottesville, Virginia 22903