

Europe Foodservice - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts 2017 - 2029

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Report description:

The Europe Foodservice Market size is estimated at USD 0.87 trillion in 2024, and is expected to reach USD 1.36 trillion by 2029, growing at a CAGR of 9.35% during the forecast period (2024-2029).

Increased investments through venture capital resulted in significant potential for cloud kitchens in the region

- The European foodservice industry is primarily dominated by full service restaurants (FSR), followed by Cafes & Bars. The market is driven by several factors, including the growth of the online food delivery market, increased tourism, and a rising immigrant population in the region. Online food delivery has emerged as a significant player in the restaurant business, with substantial investments from venture capital funding. In 2020, European food tech start-ups received a total investment of USD 2.95 billion, representing a growth of over 94% since 2015 and a staggering 1,200% since 2013. Key players in this market include Deliveroo, Just Eat, Uber Eats, GrubHub, and Glovo.

- The full service restaurant segment in Switzerland experienced a CAGR of 1.45% by value during the study period, attributed to increased disposable income and the rising tourism in the region. In 2021, the median disposable income in the European Union was 18,019 PPS (purchasing power standard) per inhabitant.

- Cloud kitchens are anticipated to be the fastest-growing segment in the foodservice industry, with a projected CAGR of 17.39% in terms of value during the forecast period. The surge in internet usage has encouraged people to order food online due to the multitude of options available through the expansion of start-up companies and chained cloud kitchens across the region. In Northern Europe, the average order value for online food delivery grew by 17% from 2019 to 2022, increasing from USD 23.53 to USD 27.54. Similarly, Southern Europe saw a 14.85% increase in average order value during the same period, rising from USD 22.22 to USD 25.52.

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The rising number of immigrants from Asian countries propelling the demand for Asian cuisine in Germany

- Germany held the major share of the food service market in Europe in 2022. The German food service sector is being driven by full-service restaurants and quick-service restaurants in the country. This is attributed to the increasing number of immigrants from Asian countries. As of 2021, there were over 2.8 million people with an Asian background living in Germany. Immigrants from Asia represent one of the largest groups in Germany, making up approximately 22% of the total immigrant population. This has created a demand for Asian cuisine among both locals and tourist visitors. Moreover, As of 2022, there were 1,432 outlets of McDonalds' and 750 Burger King outlets in Germany. The presence of major fast-food chains across the country is further propelling market growth.
- Western European food service markets have seen significant growth over the years, primarily due to the growth of the online food delivery market in the region. The market has been clustered with various smartphone applications focused on food delivery. For instance, in France, there were 15 food delivery applications with more than 120,000 downloads, and these applications collectively had more than 10.3 million downloads in 2022.
- The Dutch food service market is anticipated to grow the fastest and is projected to record a CAGR of 16.24% by value during the forecast period. The growth will be driven by the incoming tourism in the country. The influx of people coming from countries like China, Japan, and India to the Netherlands has led to the growth of full-service restaurants, especially Asian cuisine. As of February 2022, there were around 800 Chinese restaurants in the Netherlands ranging from takeaway to high-end eat-in-a-floating restaurant kind of places.

Europe Foodservice Market Trends

Cafes & bars dominate the food service outlets in Turkey, followed by QSRs

- Foodservice outlets in Turkey were dominated by cafes & bars, followed by quick service restaurants (QSRs) and full-service restaurants (FSRs), in 2022. The cafes & bars sub-segment is expected to register a CAGR of 4.30% during the study period. This growth can be attributed to the increasing demand for vintage bars, nightclubs, and cafes, as well as the popularity of Turkish alcohol and a wide variety of Arabian appetizers. As a result, the number of outlets grew from 72,634 in 2020 to 73,142 in 2022. The number of foodservice outlets in Turkey declined by 25.53% in 2023 compared to the previous year, which was due to the earthquake in Turkey and Syria. It led to destruction of infrastructure and displacement of people from the major cities of Antakya, Sanliurfa and Aleppo. More than 8,000 buildings, highways, and seaports were demolished. The country is currently in the process of massive reconstruction to restore economic activity.
- Cloud kitchen is expected to be the fastest-growing sub-segment in the market studied. It is projected to register a CAGR of 6.55% during the forecast period. The cloud kitchen industry witnessed significant growth following the pandemic, driven by the surge in online food delivery and takeaways. Popular food delivery applications like Trendyol and Yemeksepeti were downloaded over 76 million times to date. The majority of Turkish people rely on meal delivery apps to order food. The number of quick service restaurants is also growing due to consumers' preference for convenient and affordable food options. The high meat consumption in the nation has fueled the demand for foods like pizza, hamburgers, and chicken teriyaki. In 2021, the average daily consumption of red meat was 49.34 g, and the average yearly consumption of chicken was 21 kg per person. The leading quick service restaurant chains in Turkey with the highest number of stores include Burger King (700 stores), McDonald's (589 stores), and Pizza Hut (171 stores).

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French full service restaurants offer local cuisines and exclusive experiences, such as quinoa bowls, poulet tandoori, and bouillabaisse

- In France, the average order price for full service restaurants (FSR) was observed to be the highest among different foodservice types in 2022, at USD 34.17. Consumers in France have a strong preference for supporting local businesses, particularly small establishments that prioritize local sourcing. With less corporate oversight, FSRs have the freedom to experiment with menu items, promotions, and community outreach programs, helping build long-term customer loyalty among local residents. To stand out from the competition, FSRs are more inclined to develop unique menus, dining areas, and experiences exclusive to their business. Popular dishes offered by FSR cuisines in France include the Quinoa Bowl, Poulet Tandoori, and Bouillabaisse, priced at USD 16, USD 10.5, and USD 25 per 300 g, respectively.

- The demand for cloud kitchens is expected to increase in France due to people's busy schedules and the growing penetration of e-commerce channels. The rise of online food delivery platforms like Uber Eats, Deliveroo, Just Eat, and Glovo has led to an increased demand for online food delivery, thereby driving the need for cloud kitchens. Burgers and pizza were popular dishes ordered through cloud kitchens across the country in 2022. These popular menu items are priced at almost half the average order value. The popularity of fast food in recent years has prompted quick service restaurant (QSR) chains in France to expand their menu selections. The top QSR chains in the country include McDonald's, Burger King, Domino's, and Subway, with 1530, 467, 431, and 406 outlets, respectively. Popular fast-food items such as burgers, pizzas, cheesecake, and baguettes have experienced growth in both QSRs and cloud kitchens due to rising demand. Burgers and pizza are priced at USD 12.5 and USD 13.8 per serving, respectively, in the country.

Europe Foodservice Industry Overview

The Europe Foodservice Market is fragmented, with the top five companies occupying 1.95%. The major players in this market are Autogrill SpA, Coop Gruppe Genossenschaft, Cremonini SpA, McDonald's Corporation and Yum! Brands Inc. (sorted alphabetically).

Additional Benefits:

- The market estimate (ME) sheet in Excel format
- 3 months of analyst support

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