

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

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Report description:

The Germany Foodservice Market size is estimated at USD 132.04 billion in 2024, and is expected to reach USD 175.27 billion by 2029, growing at a CAGR of 5.83% during the forecast period (2024-2029).

Full service restaurants emerged as the largest segment due to increased preference for regional cuisines

- Full-service restaurants accounted for the largest market share in the German foodservice market in 2022, with Asian and European cuisines accounting for the major shares of 41.31% and 30.98%, respectively. The demand for these cuisines is attributed to the increased preference of Germans for authentic regional cuisines and international options like doner (Turkish kebab) and Asian-Pacific cuisine like Coa (Asian wok and rice bowls) and Poke You (fresh fish, Hawaiian style). Italian cuisine is perceived as healthier and less expensive; thus, new Italian concepts, such as Mama, with healthy offerings of low-carb, gluten-free, and vegan options, are in demand.
- The sub-segment for cafes and bars is expected to register a CAGR of 5.77%, by value, during the forecast period in the country, owing to the rising consumption of tea and coffee in the country, especially specialty tea/coffee. The number of specialty coffee shops, coffee consumption in offices, and in-house brewing is increasing due to the growing preference for specialty coffee and freshly ground coffee pods. The amount of roasted coffee consumed in the home increased by 2.1%, i.e., 7,900 metric tons, in 2021. Around 500 million more cups of coffee were drunk across Germany in 2021 compared to 2020.
- The cloud kitchen sub-segment is the fastest growing among all others and is anticipated to register a CAGR of 13.08%, by value, during the forecast period. The growth is expected to be aided by the increasing online food deliveries through smartphone applications led by platform-to-consumer services, such as Uber Eats, Just Eat, and Deliveroo. Between March 2020 and September 2021, Uber Eats and Just Eat accounted for 16% of the downloads of the top 50 food delivery apps in Germany.

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Germany Foodservice Market Trends

Germany's QSR market is growing, with international concepts gaining popularity

- Between 2017 and 2022, the number of quick service restaurants in Germany registered a modest CAGR of 0.85%. The traditional fast-food market in Germany is highly competitive, with well-established competitors such as McDonald's, Burger King, and Subway boasting 1484, 750, and 692 outlets, respectively, in the QSR market. However, Germans show a preference for authentic food concepts and international options, such as Doner (Turkish kebab) and Asian-Pacific cuisines like Coa (Asian wok and rice bowls) and POKE YOU (fresh fish, Hawaiian style), thus increasing competition in the QSR segment. Mexican cuisine and southwestern flavors are also the current popular choices.
- Cloud kitchen outlets are the fastest-growing type in Germany, projected to register a CAGR of 6.37% during the forecast period. The growing demand for online food delivery services is a primary driver of the cloud kitchen market in the country. Technological advancements and the advantages offered by cloud kitchens, such as higher profit margins and greater operational flexibility from any location, contribute to the industry's growth. The integration of point-of-sale (POS), kitchen display systems (KDS), and inventory management technology to streamline kitchen operations, improve communication, and prevent order-taking delays further propels the market's expansion. Full service restaurants held a significant market share of approximately 40.11% in 2022. Germans have a preference for traditional meals, particularly national and regional dishes. However, the number of full service restaurants offering international cuisines is rising, especially in cosmopolitan cities. Major cities in Germany offer a wide range of cuisines, including American, French, Italian, Thai, Chinese, and Indian.

FSR demand in Germany grows due to tourism and innovative menus

- In Germany, cloud kitchens had the highest average order value of USD 15.83 in 2022 compared to other foodservice types. During the COVID-19 pandemic, the number of online orders for takeaway and food delivery in Germany increased significantly by 245%. The average order value saw a 4.75% increase from 2020 to 2022. The presence of meal delivery apps like Delivery Hero, DoorDash, and Just Eat Takeaway.com has contributed to the scalability of the cloud kitchen model in Germany. Some popular dishes offered by these cloud kitchens include pizza, chicken wings, and burgers, priced at USD 10.5, USD 7.5, and USD 10.5 per serving, respectively.
- The demand for full service restaurants (FSR) is expected to rise due to the growing tourism industry, as tourists are inclined to explore the local cuisine of the country they visit. With professionally trained chefs at the helm, these restaurants offer innovative menus, international cuisines, and proprietary and health-conscious recipes to cater to the diverse palates of tourists. As the interest in local cuisine continued to grow, the average order value for FSR registered a CAGR of 2.58% over the study period. In 2022, popular cuisines available in the country included Edamame, Indian curries, Poke Bowl, and Bun Bo Nam Bo, priced at USD 5.2, USD 12, USD 13.3, and USD 11.2, respectively, per 300 g.
- Asian cuisine has recently made its mark in the culinary scene of Germany. Indian food, in particular, showcases flavorful curries and bread. Japanese cuisine is also experiencing a surge in popularity, with many restaurants offering sushi and dragon rolls as part of their menus.

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Germany Foodservice Industry Overview

The Germany Foodservice Market is fragmented, with the top five companies occupying 1.92%. The major players in this market are AmRest Holdings SE, Coop Gruppe Genossenschaft, Doctor's Associates Inc., LSG Group and McDonald's Corporation (sorted alphabetically).

Additional Benefits:

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

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