

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

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Report description:

The Netherlands Foodservice Market size is estimated at USD 19.67 billion in 2024, and is expected to reach USD 41.48 billion by 2029, growing at a CAGR of 16.09% during the forecast period (2024-2029).

Penetration of various global brands in the market and the popularity of fast food make QSR the major segment in the country

- Asian cuisines represent a significant part of the market's full service restaurants sub-segment. Market sales grew by 73.93% between 2020 and 2022. The popularity of Asian cuisine is growing due to the rising numbers of immigrants from various Asian countries, mostly from China, Japan, South Korea, and India. As of 2022, 4.44 million immigrants from various countries were residing in the Netherlands, with 17.3% of them being of Asian descent. Thus, the demand for traditional Chinese, Cantonese, Japanese, and Indian cuisines is high.
- The quick service restaurant is the second-largest sub-segment. This is due to the popularity of fast food, which has contributed to an increase in demand for pizza, burgers, and a few meat-based foods. This sub-segment is led by meat-based cuisines, which accounted for an estimated share of 45.81% in 2022. The region's meat consumption is high, as in 2021, the overall consumption of meat and meat products per person was 76.1 kg.
- Few global QSR brands, such as New York Pizza, Subway, and McDonald's, have penetrated the major cities in the Netherlands, offering a wide variety of meat-based fast foods. As of 2022, New York Pizza had 229 stores, McDonald's had 250 stores, and Subway had 197. Thus, the market is expected to record a CAGR of 16.11% during the forecast period.
- Cloud kitchen is the fastest-growing sub-segment in the market which is expected to record a CAGR of 29.43% by value during the forecast period. Since the pandemic, people's tendency to order food from online delivery channels has increased. As of 2022, 43% of people ordered food online from any delivery channel or from any restaurant. Thuisbezorgd.nl, Uber Eats, and Deliveroo

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are popular online delivery channels preferred by the citizens.

Netherlands Foodservice Market Trends

Full service restaurants dominate foodservice landscape in the Netherlands, driven by improved customer experience

- The foodservice industry in the Netherlands is primarily dominated by full service restaurants, followed by quick service restaurants and cafes & bars. Full service restaurants experienced a growth of 2.32% in terms of outlets during the study period. This growth can be attributed to the increasing focus of FSR businesses on providing customers with a satisfying dine-in experience, particularly as people seek more experiential options post the COVID-19 pandemic. Improved menu offerings and competitive pricing have also played a role in influencing customers' restaurant choices.
- Within the cafes & bars sub-segment, bars & pubs accounted for over 49% of the outlets in 2022, while cafes represented 41%. The abundance of bars & pubs in the Netherlands can be attributed to the vibrant nightlife culture in Dutch cities. This trend has led to a proliferation of nightclubs, pubs, and sports bars across the country. The number of pubs is steadily increasing, and as of 2021, there were 923 breweries, including microbreweries, which serve beer directly to customers.
- Cloud kitchens are expected to be the fastest-growing segment, projected to record a CAGR of 8.45% in terms of the number of outlets during the forecast period. The cloud kitchen model has become a popular choice for entrepreneurs and businesses due to its lower initial capital expenditure requirements and reduced fixed costs, such as labor charges, property taxes, and depreciation. Major fast-food brands may also consider transitioning to cloud kitchens as more people continue to prefer ordering in rather than dining out. However, a significant challenge in the cloud kitchen model is its dependence on online food delivery platforms, which are key stakeholders in the business.

FSR dishes drive high average order value in the Netherlands, with tandoori chicken and kapsalon leading the way

- In 2022, full service restaurants (FSR) had the highest average order value compared to other foodservice types, with a price of USD 26.88. The rise of chef-driven dining-out restaurants can be attributed to the increasing number of professionally trained chefs and celebrity chefs who are capitalizing on the growth opportunities provided by FSR. Automation and technological advancements in FSR establishments have streamlined preparation, service, and delivery processes, enhancing customer experience through easier ordering and payment capabilities via streaming apps. Popular dishes offered by FSR cuisines include Tandoori Chicken and Kapsalon, priced at USD 11.5 and USD 11.30 per 300 g, respectively.
- In the Netherlands, the popularity of meat-based cuisines has led restaurant chains to expand their menu selections. On average, a person in the country consumes 76 kg of meat per year, resulting in a rising demand for meat-based dishes. As a response, many quick service restaurants (QSR) and FSR establishments have included fried chicken dishes in their offerings. The Chicken Tinder, Chicken Biryani, and Tandoori Chicken dishes are priced at USD 13.5 per 300 g, representing half the average order value of QSR in the country. This shift in consumer demand may drive competition among operators to provide the most satisfying offerings. Due to people's busy schedules and the increasing penetration of e-commerce channels, the demand for cloud kitchens is expected to rise. The introduction of platforms like Uber Eats, Deliveroo, and Thuisbezorgd has fueled the growth of online meal delivery, creating a need for cloud kitchens. In 2022, the average order value of cloud kitchens was USD 10.48.

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Popular dishes such as Burgers, spring rolls, pizzas, and chicken nuggets are priced at around 50% of the average order value.

Netherlands Foodservice Industry Overview

The Netherlands Foodservice Market is fragmented, with the top five companies occupying 1.15%. The major players in this market are Autogrill SpA, Bagels & Beans BV, Domino's Pizza Enterprises Ltd, McDonald's Corporation and Meyer Horeca Group (sorted alphabetically).

Additional Benefits:

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

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