

Netherlands Foodservice - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2026 - 2031)

Market Report | 2026-01-16 | 214 pages | Mordor Intelligence

AVAILABLE LICENSES:

- Single User License \$4750.00
- Team License (1-7 Users) \$5250.00
- Site License \$6500.00
- Corporate License \$8750.00

Report description:

Netherlands Foodservice Market Analysis

The Netherlands foodservice market size in 2026 is estimated at USD 26.58 billion, growing from 2025 value of USD 22.98 billion with 2031 projections showing USD 55.08 billion, growing at 15.68% CAGR over 2026-2031. Demand recovery after the pandemic, rapid digital adoption by operators, and an urban population that spends heavily on convenience-focused meals combine to underpin this stout expansion of the Netherlands foodservice market. Technology investments, such as AI-enabled kitchen automation and QR-based ordering, drive operating cost efficiencies that help offset wage inflation. A surge in multicultural menu offerings has broadened consumer interest while boosting transaction frequency, especially among younger, ethnically diverse customers. Added momentum comes from a tourism sector that surpassed pre-2020 visitor levels in 2024, channeling travel spending toward restaurants, cafes, and hotel dining outlets.

Netherlands Foodservice Market Trends and Insights

Rising demand for experiential dining and improved menus

In the Netherlands, dining is increasingly viewed as an experience rather than just a meal. To meet this demand, restaurants are focusing on enhancing ambiance, improving service quality, and innovating their menus. This trend accelerated after the pandemic, as establishments recognized the need to differentiate themselves from delivery-only competitors and justify premium pricing amidst rising costs. Consequently, restaurants are allocating an additional 15-20% of their budgets to interior design and

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

staff training. Menu innovations now prioritize visually appealing dishes and locally-sourced ingredients, aligning with the sustainability preferences of Dutch consumers. Premium casual dining concepts have gained traction, attracting customers from both traditional fine dining and quick-service segments by offering elevated experiences at more affordable price points.

Rapid Expansion of Cloud Kitchens

In 2024, over 400 new ghost kitchen facilities were established in the Netherlands, signifying a transition from a pandemic-driven necessity to a permanent feature in the foodservice sector. This model is highly appealing as it reduces real estate costs by 60-70% compared to traditional restaurants. Additionally, it supports multi-brand operations from a single location, allowing operators to test new concepts with minimal capital investment, according to the Dutch Chamber of Commerce. Leading brands like Domino's and McDonald's have introduced dedicated cloud kitchen formats to cater to delivery-only markets. Meanwhile, independent operators are utilizing shared kitchen spaces to access premium delivery zones that were previously inaccessible. The regulatory environment for cloud kitchens has also evolved. Municipal authorities are streamlining permitting processes, and the NVWA is implementing specific food safety protocols for multi-tenant kitchen facilities.

Labor Cost Increases and Workforce Shortages

In 2024, despite an average wage increase of 8.2%, 40% of Dutch foodservice businesses continue to face significant workforce shortages. Positions in kitchens and management remain particularly hard to fill, compelling many operators to reduce operating hours or scale back service capacity during peak periods. This ongoing labor shortage has accelerated the adoption of automation technologies, with tools such as QR-based ordering systems and kitchen display technologies now considered essential rather than optional. Smaller independent operators are disproportionately affected by wage inflation, as they lack the economies of scale needed to offset rising labor costs while maintaining competitive pricing. Consequently, the sector is witnessing increased market consolidation, with larger chains acquiring struggling independent businesses to expand their market presence and leverage operational efficiencies.

Other drivers and restraints analyzed in the detailed report include:

Strong multicultural influences expanding demand for ethnic and international cuisines. Rising Tourism in the Country
Consumer Price Sensitivity Amid Inflationary Pressures

For complete list of drivers and restraints, kindly check the Table Of Contents.

Segment Analysis

In 2025, Quick Service Restaurants hold a leading 39.74% market share, highlighting Dutch consumers' inclination toward convenient and affordable dining options that suit their fast-paced urban lifestyles. At the same time, Cloud Kitchens stand out as the market's fastest-growing segment, with a strong 26.98% CAGR projected through 2031. Operators are increasingly adopting delivery-focused formats, avoiding front-of-house expenses, and enhancing kitchen efficiency, as noted by the Dutch Chamber of Commerce. Full-service restaurants face challenges from rising labor costs but benefit from the growing appeal of experiential dining. Meanwhile, Cafe and Bars leverage their social appeal to attract customers during post-work hours and weekends, offering an experience that delivery services cannot replicate.

This segmentation shift reflects a significant transformation in consumer behavior. Younger demographics increasingly prefer on-demand food access over traditional dining schedules. Cloud kitchen operators utilize advanced demand forecasting systems to optimize menu availability and minimize food waste. This operational efficiency enables them to achieve food cost ratios that are 3-5 percentage points lower than those of traditional restaurants. Leading chains like McDonald's and Domino's have

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

established dedicated cloud kitchen facilities to cater to delivery-only areas. At the same time, independent operators are using shared kitchen spaces to experiment with new concepts at a lower capital investment, fostering a dynamic and innovative foodservice ecosystem.

In 2025, independent outlets hold a significant 54.05% share of the market, highlighting the enduring popularity of locally-owned establishments. These venues are celebrated for their ability to provide personalized service and distinctive menu offerings that cater specifically to neighborhood preferences. This dominance reflects the strong inclination of Dutch consumers toward authentic, community-oriented dining experiences, which they often favor over the standardized options offered by chain restaurants. However, chained outlets are experiencing rapid growth, with a robust 16.27% CAGR projected through 2031. This expansion is driven by their superior operational efficiencies, advanced technology integration, and greater access to capital, enabling them to scale operations and invest in renovation projects effectively.

The competitive landscape between independent and chain operators has become increasingly dynamic, as both segments adopt overlapping technologies and service strategies. Independent restaurants are progressively utilizing third-party delivery platforms and advanced point-of-sale systems, tools that were once predominantly associated with chain establishments. At the same time, major chains are exploring localized menu adaptations and community engagement initiatives, practices traditionally linked to independent operators. This convergence of strategies signals a significant shift in the market, where the determinants of success are transitioning from ownership structure to a focus on operational excellence and the ability to deliver superior customer experiences. Regardless of whether an establishment is independently owned or part of a larger chain, the emphasis is now on meeting evolving consumer expectations and excelling in service delivery.

The Netherlands Foodservice Market Report is Segmented by Foodservice Type (Cafe and Bars, Cloud Kitchen, Full Service Restaurants, Quick Service Restaurants), Outlet (Chained Outlets, Independent Outlets), Location (Leisure, Lodging, Retail, Standalone, Travel), and Service Type (Dine-In, Takeaway, Delivery). The Market Forecasts are Provided in Terms of Value (USD).

List of Companies Covered in this Report:

Alsea SAB de CV Autogrill SpA Bagels & Beans BV Doctor's Associates Inc. (Subway) Domino's Pizza Enterprises Ltd Five Guys Enterprises LLC Franchise Friendly Concepts BV Inter IKEA Holding BV La Cubanita Franchise BV McDonald's Corporation Meyer Horeca Group Papa John's International Inc. Spar International Van der Valk Europe BV Yum! Brands Inc. (KFC, Pizza Hut, Taco Bell) Just Eat Takeaway (NL) Uber Eats Netherlands BV New York Pizza Restaurant Brands International Starbucks Coffee Netherlands BV

Additional Benefits:

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

Table of Contents:

1 INTRODUCTION

1.1 Study Assumptions and Market Definition

1.2 Scope of the Study

2 RESEARCH METHODOLOGY

3 EXECUTIVE SUMMARY

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

4 KEY INDUSTRY TRENDS

- 4.1 Number of Outlets
- 4.2 Average Order Value
- 4.3 Regulatory Framework

5 MARKET LANDSCAPE

- 5.1 Market Overview
- 5.2 Market Drivers
 - 5.2.1 Rising demand for experiential dining and improved menus
 - 5.2.2 Rapid expansion of cloud kitchens
 - 5.2.3 Strong multicultural influences expanding demand for ethnic and international cuisines.
 - 5.2.4 Rising Tourism in the Country
 - 5.2.5 Rising urbanization and disposable income
 - 5.2.6 Expansion of chains investing in technology for enhanced ordering and payment convenience.
- 5.3 Market Restraints
 - 5.3.1 Labor cost increases and workforce shortages
 - 5.3.2 Regulatory compliance in food safety and labor laws
 - 5.3.3 High commission fees of delivery platforms
 - 5.3.4 Consumer price sensitivity amid inflationary pressures
- 5.4 Regulatory Outlook
- 5.5 Porter's Five Forces
 - 5.5.1 Threat of New Entrants
 - 5.5.2 Bargaining Power of Buyers/Consumers
 - 5.5.3 Bargaining Power of Suppliers
 - 5.5.4 Threat of Substitute Products
 - 5.5.5 Intensity of Competitive Rivalry

6 MARKET SIZE AND GROWTH FORECASTS (VALUE)

- 6.1 By Foodservice Type
 - 6.1.1 Cafe and Bars
 - 6.1.1.1 By Cuisine
 - 6.1.1.1.1 Bars & Pubs
 - 6.1.1.1.2 Cafe
 - 6.1.1.1.3 Juice/Smoothie/Desserts Bars
 - 6.1.1.1.4 Specialist Coffee & Tea Shops
 - 6.1.1.2 Cloud Kitchen
 - 6.1.1.3 Full Service Restaurants
 - 6.1.1.3.1 By Cuisine
 - 6.1.1.3.1.1 Asian
 - 6.1.1.3.1.2 European
 - 6.1.1.3.1.3 Latin American
 - 6.1.1.3.1.4 Middle Eastern
 - 6.1.1.3.1.5 North American
 - 6.1.1.3.1.6 Other FSR Cuisines
 - 6.1.1.4 Quick Service Restaurants
 - 6.1.1.4.1 By Cuisine
 - 6.1.1.4.1.1 Bakeries

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

- 6.1.4.1.2 Burger
- 6.1.4.1.3 Ice Cream
- 6.1.4.1.4 Meat-based Cuisines
- 6.1.4.1.5 Pizza
- 6.1.4.1.6 Other QSR Cuisines

6.2 By Outlet

- 6.2.1 Chained Outlets
- 6.2.2 Independent Outlets

6.3 By Locations

- 6.3.1 Leisure
- 6.3.2 Lodging
- 6.3.3 Retail
- 6.3.4 Sandalone
- 6.3.5 Travel

6.4 By Service Type

- 6.4.1 Dine-in
- 6.4.2 Takeaway
- 6.4.3 Delivery

7 COMPETITIVE LANDSCAPE

7.1 Market Concentration

7.2 Strategic Moves

7.3 Market Ranking Analysis

7.4 Company Profiles (includes Global-level Overview, Market-level Overview, Core Segments, Financials (if available), Strategic Information, Market Rank/Share, Products and Services, Recent Developments)

7.4.1 Alsea SAB de CV

7.4.2 Autogrill SpA

7.4.3 Bagels & Beans BV

7.4.4 Doctor's Associates Inc. (Subway)

7.4.5 Domino's Pizza Enterprises Ltd

7.4.6 Five Guys Enterprises LLC

7.4.7 Franchise Friendly Concepts BV

7.4.8 Inter IKEA Holding BV

7.4.9 La Cubanita Franchise BV

7.4.10 McDonald's Corporation

7.4.11 Meyer Horeca Group

7.4.12 Papa John's International Inc.

7.4.13 Spar International

7.4.14 Van der Valk Europe BV

7.4.15 Yum! Brands Inc. (KFC, Pizza Hut, Taco Bell)

7.4.16 Just Eat Takeaway (NL)

7.4.17 Uber Eats Netherlands BV

7.4.18 New York Pizza

7.4.19 Restaurant Brands International

7.4.20 Starbucks Coffee Netherlands BV

8 MARKET OPPORTUNITIES AND FUTURE OUTLOOK

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

**Netherlands Foodservice - Market Share Analysis, Industry Trends & Statistics,
Growth Forecasts (2026 - 2031)**

Market Report | 2026-01-16 | 214 pages | Mordor Intelligence

To place an Order with Scotts International:

- Print this form
- Complete the relevant blank fields and sign
- Send as a scanned email to support@scotts-international.com

ORDER FORM:

Select license	License	Price
	Single User License	\$4750.00
	Team License (1-7 Users)	\$5250.00
	Site License	\$6500.00
	Corporate License	\$8750.00
		VAT
		Total

*Please circle the relevant license option. For any questions please contact support@scotts-international.com or 0048 603 394 346.

** VAT will be added at 23% for Polish based companies, individuals and EU based companies who are unable to provide a valid EU Vat Numbers.

Email*	<input type="text"/>	Phone*	<input type="text"/>
First Name*	<input type="text"/>	Last Name*	<input type="text"/>
Job title*	<input type="text"/>		
Company Name*	<input type="text"/>	EU Vat / Tax ID / NIP number*	<input type="text"/>
Address*	<input type="text"/>	City*	<input type="text"/>
Zip Code*	<input type="text"/>	Country*	<input type="text"/>
		Date	<input type="text" value="2026-02-28"/>
		Signature	

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

