



Consumer Foodservice in the Netherlands

February 2023

Table of Contents

Consumer Foodservice in the Netherlands

EXECUTIVE SUMMARY

Consumer foodservice in 2022: The big picture

2022 key trends

Competitive landscape

Independent foodservice developments

What next for consumer foodservice?

MARKET DATA

Table 1 - Units, Transactions and Value Sales in Consumer Foodservice 2017-2022

Table 2 - Units, Transactions and Value Sales in Consumer Foodservice: % Growth 2017-2022

Table 3 - Consumer Foodservice by Independent vs Chained by Type: Units/Outlets 2022

Table 4 - Consumer Foodservice by Independent vs Chained: % Foodservice Value 2017-2022

Table 5 - Sales in Consumer Foodservice by Eat-In vs Delivery and To-Go: % Foodservice Value 2017-2022

Table 6 - Sales in Consumer Foodservice by Food vs Drink Split: % Foodservice Value 2017-2022

Table 7 - Sales in Consumer Foodservice by Food vs Drink Split by Type: % Foodservice Value 2022

Table 8 - Sales in Consumer Foodservice by Online/Offline Ordering: % Foodservice Value 2017-2022

Table 9 - Sales in Consumer Foodservice by Location: % Foodservice Value 2017-2022

Table 10 - GBO Company Shares in Chained Consumer Foodservice: % Foodservice Value 2018-2022

Table 11 - GBN Brand Shares in Chained Consumer Foodservice: % Foodservice Value 2019-2022

Table 12 - GBN Brand Shares in Chained Consumer Foodservice: Units/Outlets 2022

Table 13 - Forecast Units, Transactions and Value Sales in Consumer Foodservice 2022-2027

Table 14 - Forecast Units, Transactions and Value Sales in Consumer Foodservice: % Growth 2022-2027

DISCLAIMER

SOURCES

Summary 1 - Research Sources

Cafés/Bars in the Netherlands

KEY DATA FINDINGS

2022 DEVELOPMENTS

Recovery of specialist coffee and tea shops driven by premiumisation

Bars/pubs shows signs of recovery, but many outlets continue to struggle

Consolidation to lower costs and increase business continuity and efficiency

PROSPECTS AND OPPORTUNITIES

Strong chains set to gain competitive advantages in a tough business climate

More players see development and growth opportunities in cafés

Energy crisis to continue to affect the performance of cafés/bars

CATEGORY DATA

Table 15 - Cafés/Bars by Category: Units/Outlets 2017-2022

Table 16 - Sales in Cafés/Bars by Category: Number of Transactions 2017-2022

Table 17 - Sales in Cafés/Bars by Category: Foodservice Value 2017-2022

Table 18 - Cafés/Bars by Category: % Units/Outlets Growth 2017-2022

Table 19 - Sales in Cafés/Bars by Category: % Transaction Growth 2017-2022

Table 20 - Sales in Cafés/Bars by Category: % Foodservice Value Growth 2017-2022

Table 21 - GBO Company Shares in Chained Cafés/Bars: % Foodservice Value 2018-2022

Table 22 - GBN Brand Shares in Chained Cafés/Bars: % Foodservice Value 2019-2022

Table 23 - Forecast Cafés/Bars by Category: Units/Outlets 2022-2027

- Table 24 - Forecast Sales in Cafés/Bars by Category: Number of Transactions 2022-2027
- Table 25 - Forecast Sales in Cafés/Bars by Category: Foodservice Value 2022-2027
- Table 26 - Forecast Cafés/Bars by Category: % Units/Outlets Growth 2022-2027
- Table 27 - Forecast Sales in Cafés/Bars by Category: % Transaction Growth 2022-2027
- Table 28 - Forecast Sales in Cafés/Bars by Category: % Foodservice Value Growth 2022-2027

Full-Service Restaurants in the Netherlands

KEY DATA FINDINGS

2022 DEVELOPMENTS

- Scaling and outlet growth characterise full-service restaurants
- Casual dining benefits from the consumer search for value for money
- More interest in vegetarian and vegan food in full-service restaurants

PROSPECTS AND OPPORTUNITIES

- Limits to the development of chained full-service restaurants
- Independents need to specialise to stand out from the crowd
- Price increases run the risk of discouraging consumers

CATEGORY DATA

- Table 29 - Full-Service Restaurants by Category: Units/Outlets 2017-2022
- Table 30 - Sales in Full-Service Restaurants by Category: Number of Transactions 2017-2022
- Table 31 - Sales in Full-Service Restaurants by Category: Foodservice Value 2017-2022
- Table 32 - Full-Service Restaurants by Category: % Units/Outlets Growth 2017-2022
- Table 33 - Sales in Full-Service Restaurants by Category: % Transaction Growth 2017-2022
- Table 34 - Sales in Full-Service Restaurants by Category: % Foodservice Value Growth 2017-2022
- Table 35 - GBO Company Shares in Chained Full-Service Restaurants: % Foodservice Value 2018-2022
- Table 36 - GBN Brand Shares in Chained Full-Service Restaurants: % Foodservice Value 2019-2022
- Table 37 - Forecast Full-Service Restaurants by Category: Units/Outlets 2022-2027
- Table 38 - Forecast Sales in Full-Service Restaurants by Category: Number of Transactions 2022-2027
- Table 39 - Forecast Sales in Full-Service Restaurants by Category: Foodservice Value 2022-2027
- Table 40 - Forecast Full-Service Restaurants by Category: % Units/Outlets Growth 2022-2027
- Table 41 - Forecast Sales in Full-Service Restaurants by Category: % Transaction Growth 2022-2027
- Table 42 - Forecast Sales in Full-Service Restaurants by Category: % Foodservice Value Growth 2022-2027

Limited-Service Restaurants in the Netherlands

KEY DATA FINDINGS

2022 DEVELOPMENTS

- Prices increase due to rising costs, while the threat grows from grocery retailers and dark kitchens
- Asian limited-service restaurants driven by rising demand for sushi and healthy food choices
- Energy crisis hits deep-fried food players especially hard

PROSPECTS AND OPPORTUNITIES

- Government considers regulation to make unhealthy food less accessible
- Limited-service restaurants to encroach on more spaces
- Franchisers set to expand

CATEGORY DATA

- Table 43 - Limited-Service Restaurants by Category: Units/Outlets 2017-2022
- Table 44 - Sales in Limited-Service Restaurants by Category: Number of Transactions 2017-2022
- Table 45 - Sales in Limited-Service Restaurants by Category: Foodservice Value 2017-2022

- Table 46 - Limited-Service Restaurants by Category: % Units/Outlets Growth 2017-2022
- Table 47 - Sales in Limited-Service Restaurants by Category: % Transaction Growth 2017-2022
- Table 48 - Sales in Limited-Service Restaurants by Category: % Foodservice Value Growth 2017-2022
- Table 49 - GBO Company Shares in Chained Limited-Service Restaurants: % Foodservice Value 2018-2022
- Table 50 - GBN Brand Shares in Chained Limited-Service Restaurants: % Foodservice Value 2019-2022
- Table 51 - Forecast Limited-Service Restaurants by Category: Units/Outlets 2022-2027
- Table 52 - Forecast Sales in Limited-Service Restaurants by Category: Number of Transactions 2022-2027
- Table 53 - Forecast Sales in Limited-Service Restaurants by Category: Foodservice Value 2022-2027
- Table 54 - Forecast Limited-Service Restaurants by Category: % Units/Outlets Growth 2022-2027
- Table 55 - Forecast Sales in Limited-Service Restaurants by Category: % Transaction Growth 2022-2027
- Table 56 - Forecast Sales in Limited-Service Restaurants by Category: % Foodservice Value Growth 2022-2027

Self-Service Cafeterias in the Netherlands

KEY DATA FINDINGS

2022 DEVELOPMENTS

- Foodservice gains importance in retail spaces
- Staff shortages act as a break on recovery
- Self-service cafeterias look to delivery to increase turnover

PROSPECTS AND OPPORTUNITIES

- Self-service cafeterias to derive some benefit as an alternative to full- and limited-service restaurants
- Self-service cafeterias to gain traction from the recovery of physical retailing
- Increasing focus on a healthy menu

CATEGORY DATA

- Table 57 - Self-Service Cafeterias: Units/Outlets 2017-2022
- Table 58 - Sales in Self-Service Cafeterias: Number of Transactions 2017-2022
- Table 59 - Sales in Self-Service Cafeterias: Foodservice Value 2017-2022
- Table 60 - Sales in Self-Service Cafeterias: % Units/Outlets Growth 2017-2022
- Table 61 - Sales in Self-Service Cafeterias: % Transaction Growth 2017-2022
- Table 62 - Sales in Self-Service Cafeterias: % Foodservice Value Growth 2017-2022
- Table 63 - GBO Company Shares in Chained Self-Service Cafeterias: % Foodservice Value 2018-2022
- Table 64 - GBN Brand Shares in Chained Self-Service Cafeterias: % Foodservice Value 2019-2022
- Table 65 - Forecast Self-Service Cafeterias: Units/Outlets 2022-2027
- Table 66 - Forecast Sales in Self-Service Cafeterias: Number of Transactions 2022-2027
- Table 67 - Forecast Sales in Self-Service Cafeterias: Foodservice Value 2022-2027
- Table 68 - Forecast Self-Service Cafeterias: % Units/Outlets Growth 2022-2027
- Table 69 - Forecast Sales in Self-Service Cafeterias: % Transaction Growth 2022-2027
- Table 70 - Forecast Sales in Self-Service Cafeterias: % Foodservice Value Growth 2022-2027

Street Stalls/Kiosks in the Netherlands

KEY DATA FINDINGS

2022 DEVELOPMENTS

- Partial recovery of rail passengers and staff shortages limit foodservice sales in 2022
- Small independent kiosks find a niche
- Higher prices increase spend per transaction

PROSPECTS AND OPPORTUNITIES

- Staff shortages may negatively affect growth potential
- Rail limitations likely to dampen the performance of kiosks

Food courts continue to struggle to find their place

CATEGORY DATA

Table 71 - Street Stalls/Kiosks: Units/Outlets 2017-2022

Table 72 - Sales in Street Stalls/Kiosks: Number of Transactions 2017-2022

Table 73 - Sales in Street Stalls/Kiosks: Foodservice Value 2017-2022

Table 74 - Street Stalls/Kiosks: % Units/Outlets Growth 2017-2022

Table 75 - Sales in Street Stalls/Kiosks: % Transaction Growth 2017-2022

Table 76 - Sales in Street Stalls/Kiosks: % Foodservice Value Growth 2017-2022

Table 77 - GBO Company Shares in Chained Street Stalls/Kiosks: % Foodservice Value 2018-2022

Table 78 - GBN Brand Shares in Chained Street Stalls/Kiosks: % Foodservice Value 2019-2022

Table 79 - Forecast Street Stalls/Kiosks: Units/Outlets 2022-2027

Table 80 - Forecast Sales in Street Stalls/Kiosks: Number of Transactions 2022-2027

Table 81 - Forecast Sales in Street Stalls/Kiosks: Foodservice Value 2022-2027

Table 82 - Forecast Street Stalls/Kiosks: % Units/Outlets Growth 2022-2027

Table 83 - Forecast Sales in Street Stalls/Kiosks: % Transaction Growth 2022-2027

Table 84 - Forecast Sales in Street Stalls/Kiosks: % Foodservice Value Growth 2022-2027

Consumer Foodservice By Location in the Netherlands

KEY DATA FINDINGS

2022 DEVELOPMENTS

Lodging sees highest value sales growth, driven by faster domestic and inbound tourist flows

Consumer foodservice through retail grows quickly as shopping locations reopen

Slow return to establishments and venues limits the performance of consumer foodservice through leisure

PROSPECTS AND OPPORTUNITIES

Higher traveller numbers to spur consumer foodservice through travel

Standalone to lose ground to non-standalone channels

Modern grocery retailers to expand their foodservice offer

CATEGORY DATA

Table 85 - Consumer Foodservice by Location: Units/Outlets 2017-2022

Table 86 - Sales in Consumer Foodservice by Location: Number of Transactions 2017-2022

Table 87 - Sales in Consumer Foodservice by Location: Foodservice Value 2017-2022

Table 88 - Consumer Foodservice by Location: % Units/Outlets Growth 2017-2022

Table 89 - Sales in Consumer Foodservice by Location: % Transaction Growth 2017-2022

Table 90 - Sales in Consumer Foodservice by Location: % Foodservice Value Growth 2017-2022

Table 91 - Consumer Foodservice through Standalone: Units/Outlets 2017-2022

Table 92 - Sales in Consumer Foodservice through Standalone: Number of Transactions 2017-2022

Table 93 - Sales in Consumer Foodservice through Standalone: Foodservice Value 2017-2022

Table 94 - Consumer Foodservice through Standalone: % Units/Outlets Growth 2017-2022

Table 95 - Sales in Consumer Foodservice through Standalone: % Transaction Growth 2017-2022

Table 96 - Sales in Consumer Foodservice through Standalone: % Foodservice Value Growth 2017-2022

Table 97 - Consumer Foodservice through Leisure: Units/Outlets 2017-2022

Table 98 - Sales in Consumer Foodservice through Leisure: Number of Transactions 2017-2022

Table 99 - Sales in Consumer Foodservice through Leisure: Foodservice Value 2017-2022

Table 100 - Consumer Foodservice through Leisure: % Units/Outlets Growth 2017-2022

Table 101 - Sales in Consumer Foodservice through Leisure: % Transaction Growth 2017-2022

Table 102 - Sales in Consumer Foodservice through Leisure: % Foodservice Value Growth 2017-2022

Table 103 - Consumer Foodservice through Retail: Units/Outlets 2017-2022

Table 104 - Sales in Consumer Foodservice through Retail: Number of Transactions 2017-2022

Table 105 - Sales in Consumer Foodservice through Retail: Foodservice Value 2017-2022

Table 106 - Consumer Foodservice through Retail: % Units/Outlets Growth 2017-2022
Table 107 - Sales in Consumer Foodservice through Retail: % Transaction Growth 2017-2022
Table 108 - Sales in Consumer Foodservice through Retail: % Foodservice Value Growth 2017-2022
Table 109 - Consumer Foodservice through Lodging: Units/Outlets 2017-2022
Table 110 - Sales in Consumer Foodservice through Lodging: Number of Transactions 2017-2022
Table 111 - Sales in Consumer Foodservice through Lodging: Foodservice Value 2017-2022
Table 112 - Consumer Foodservice through Lodging: % Units/Outlets Growth 2017-2022
Table 113 - Sales in Consumer Foodservice through Lodging: % Transaction Growth 2017-2022
Table 114 - Sales in Consumer Foodservice through Lodging: % Foodservice Value Growth 2017-2022
Table 115 - Consumer Foodservice through Travel: Units/Outlets 2017-2022
Table 116 - Sales in Consumer Foodservice through Travel: Number of Transactions 2017-2022
Table 117 - Sales in Consumer Foodservice through Travel: Foodservice Value 2017-2022
Table 118 - Consumer Foodservice through Travel: % Units/Outlets Growth 2017-2022
Table 119 - Sales in Consumer Foodservice through Travel: % Transaction Growth 2017-2022
Table 120 - Sales in Consumer Foodservice through Travel: % Foodservice Value Growth 2017-2022
Table 121 - Forecast Consumer Foodservice by Location: Units/Outlets 2022-2027
Table 122 - Forecast Sales in Consumer Foodservice by Location: Number of Transactions 2022-2027
Table 123 - Forecast Sales in Consumer Foodservice by Location: Foodservice Value 2022-2027
Table 124 - Forecast Consumer Foodservice by Location: % Units/Outlets Growth 2022-2027
Table 125 - Forecast Sales in Consumer Foodservice by Location: % Transaction Growth 2022-2027
Table 126 - Forecast Sales in Consumer Foodservice by Location: % Foodservice Value Growth 2022-2027
Table 127 - Forecast Consumer Foodservice through Standalone: Units/Outlets 2022-2027
Table 128 - Forecast Sales in Consumer Foodservice through Standalone: Number of Transactions 2022-2027
Table 129 - Forecast Sales in Consumer Foodservice through Standalone: Foodservice Value 2022-2027
Table 130 - Forecast Consumer Foodservice through Standalone: % Units/Outlets Growth 2022-2027
Table 131 - Forecast Sales in Consumer Foodservice through Standalone: % Transaction Growth 2022-2027
Table 132 - Forecast Sales in Consumer Foodservice through Standalone: % Foodservice Value Growth 2022-2027
Table 133 - Forecast Consumer Foodservice through Leisure: Units/Outlets 2022-2027
Table 134 - Forecast Sales in Consumer Foodservice through Leisure: Number of Transactions 2022-2027
Table 135 - Forecast Sales in Consumer Foodservice through Leisure: Foodservice Value 2022-2027
Table 136 - Forecast Consumer Foodservice through Leisure: % Units/Outlets Growth 2022-2027
Table 137 - Forecast Sales in Consumer Foodservice through Leisure: % Transaction Growth 2022-2027
Table 138 - Forecast Sales in Consumer Foodservice through Leisure: % Foodservice Value Growth 2022-2027
Table 139 - Forecast Consumer Foodservice through Retail: Units/Outlets 2022-2027
Table 140 - Forecast Sales in Consumer Foodservice through Retail: Number of Transactions 2022-2027
Table 141 - Forecast Sales in Consumer Foodservice through Retail: Foodservice Value 2022-2027
Table 142 - Forecast Consumer Foodservice through Retail: % Units/Outlets Growth 2022-2027
Table 143 - Forecast Sales in Consumer Foodservice through Retail: % Transaction Growth 2022-2027
Table 144 - Forecast Sales in Consumer Foodservice through Retail: % Foodservice Value Growth 2022-2027
Table 145 - Forecast Consumer Foodservice through Lodging: Units/Outlets 2022-2027
Table 146 - Forecast Sales in Consumer Foodservice through Lodging: Number of Transactions 2022-2027
Table 147 - Forecast Sales in Consumer Foodservice through Lodging: Foodservice Value 2022-2027
Table 148 - Forecast Consumer Foodservice through Lodging: % Units/Outlets Growth 2022-2027
Table 149 - Forecast Sales in Consumer Foodservice through Lodging: % Transaction Growth 2022-2027
Table 150 - Forecast Sales in Consumer Foodservice through Lodging: % Foodservice Value Growth 2022-2027
Table 151 - Forecast Consumer Foodservice through Travel: Units/Outlets 2022-2027
Table 152 - Forecast Sales in Consumer Foodservice through Travel: Number of Transactions 2022-2027
Table 153 - Forecast Sales in Consumer Foodservice through Travel: Foodservice Value 2022-2027
Table 154 - Forecast Consumer Foodservice through Travel: % Units/Outlets Growth 2022-2027
Table 155 - Forecast Sales in Consumer Foodservice through Travel: % Transaction Growth 2022-2027
Table 156 - Forecast Sales in Consumer Foodservice through Travel: % Foodservice Value Growth 2022-2027

About Euromonitor International

Euromonitor International is an independent market intelligence provider. Data, insight and analysis stem from in-the-field research spanning 210 national markets.

Content ranges from the in-depth and country-specific, to key strategic themes with a global range and significance. Products cover a comprehensive range of insights and market data, but can be broadly categorised as:

- **Strategy Briefings:** Global or regional in scope, and focussing on the most important themes shaping consumer demand, the key markets, competitive environment and future outlook across a range of industries.
- **Company Profiles:** Analysis dedicated to the world's most significant companies, with detailed insight into their activities, focus of operations, their competitors, their geographic presence and performance.
- **Country Reports:** For an in-depth understanding of specific countries, whether by industry, economic metrics or consumer trends and lifestyles. These reports cover current trends, consumer demand, market potential and future prospects, with country-specific local insight and comprehensive data, unavailable elsewhere.

For more information on this report, further enquiries can be directed via this link www.euromonitor.com/consumer-foodservice-in-the-netherlands/report.