



Euromonitor
International

Consumer Foodservice in the Netherlands

March 2025

Table of Contents

EXECUTIVE SUMMARY

Consumer foodservice in 2024: The big picture

2024 key trends

Competitive landscape

Independent foodservice developments

What next for consumer foodservice?

MARKET DATA

Table 1 - Units, Transactions and Value Sales in Consumer Foodservice 2019-2024

Table 2 - Units, Transactions and Value Sales in Consumer Foodservice: % Growth 2019-2024

Table 3 - Consumer Foodservice by Independent vs Chained by Type: Units/Outlets 2024

Table 4 - Consumer Foodservice by Independent vs Chained: % Foodservice Value 2019-2024

Table 5 - Sales in Consumer Foodservice by Food vs Drink Split: % Foodservice Value 2019-2024

Table 6 - Sales in Consumer Foodservice by Food vs Drink Split by Type: % Foodservice Value 2024

Table 7 - Sales in Consumer Foodservice by Location: % Foodservice Value 2019-2024

Table 8 - Sales in Consumer Foodservice by Fulfillment: % Foodservice Value 2019-2024

Table 9 - GBO Company Shares in Chained Consumer Foodservice: % Foodservice Value 2020-2024

Table 10 - GBN Brand Shares in Chained Consumer Foodservice: % Foodservice Value 2021-2024

Table 11 - GBN Brand Shares in Chained Consumer Foodservice: Units/Outlets 2024

Table 12 - Forecast Units, Transactions and Value Sales in Consumer Foodservice 2024-2029

Table 13 - Forecast Units, Transactions and Value Sales in Consumer Foodservice: % Growth 2024-2029

DISCLAIMER

SOURCES

Summary 1 - Research Sources

Cafés/Bars in the Netherlands

KEY DATA FINDINGS

2024 DEVELOPMENTS

Cafés/bars achieves growth in 2024 but continues to face challenges

Traditional brown bars are slowly disappearing as they are considered outdated

Changing attitudes to alcohol consumption poses challenges for the category

PROSPECTS AND OPPORTUNITIES

The number of outlets will see further decline over the forecast period

Bars/pubs will switch focus as consumer behaviour evolves

Specialist coffee and tea shops will become increasingly visible in the coming years

CATEGORY DATA

Table 14 - Cafés/Bars by Category: Units/Outlets 2019-2024

Table 15 - Sales in Cafés/Bars by Category: Number of Transactions 2019-2024

Table 16 - Sales in Cafés/Bars by Category: Foodservice Value 2019-2024

Table 17 - Cafés/Bars by Category: % Units/Outlets Growth 2019-2024

Table 18 - Sales in Cafés/Bars by Category: % Transaction Growth 2019-2024

Table 19 - Sales in Cafés/Bars by Category: % Foodservice Value Growth 2019-2024

Table 20 - GBO Company Shares in Chained Cafés/Bars: % Foodservice Value 2020-2024

Table 21 - GBN Brand Shares in Chained Cafés/Bars: % Foodservice Value 2021-2024

Table 22 - Forecast Cafés/Bars by Category: Units/Outlets 2024-2029

Table 23 - Forecast Sales in Cafés/Bars by Category: Number of Transactions 2024-2029

Table 24 - Forecast Sales in Cafés/Bars by Category: Foodservice Value 2024-2029

Table 25 - Forecast Cafés/Bars by Category: % Units/Outlets Growth 2024-2029

Table 26 - Forecast Sales in Cafés/Bars by Category: % Transaction Growth 2024-2029

Table 27 - Forecast Sales in Cafés/Bars by Category: % Foodservice Value Growth 2024-2029

Full-Service Restaurants in the Netherlands

KEY DATA FINDINGS

2024 DEVELOPMENTS

Consumers turned off by high prices in full-service restaurants in 2024

Outlet expansion sees chained pizza full-service restaurants register growth

Full-service restaurants turn to ready-made components to increase profit margins

PROSPECTS AND OPPORTUNITIES

Growth in full-service restaurants will be driven by chained restaurants over the forecast period

Full-service restaurants will seek to diversify income streams to boost profit margins

Reduction of food waste set to become a focal point as the costs of ingredients rise

CATEGORY DATA

Table 28 - Full-Service Restaurants by Category: Units/Outlets 2019-2024

Table 29 - Sales in Full-Service Restaurants by Category: Number of Transactions 2019-2024

Table 30 - Sales in Full-Service Restaurants by Category: Foodservice Value 2019-2024

Table 31 - Full-Service Restaurants by Category: % Units/Outlets Growth 2019-2024

Table 32 - Sales in Full-Service Restaurants by Category: % Transaction Growth 2019-2024

Table 33 - Sales in Full-Service Restaurants by Category: % Foodservice Value Growth 2019-2024

Table 34 - GBO Company Shares in Chained Full-Service Restaurants: % Foodservice Value 2020-2024

Table 35 - GBN Brand Shares in Chained Full-Service Restaurants: % Foodservice Value 2021-2024

Table 36 - Forecast Full-Service Restaurants by Category: Units/Outlets 2024-2029

Table 37 - Forecast Sales in Full-Service Restaurants by Category: Number of Transactions 2024-2029

Table 38 - Forecast Sales in Full-Service Restaurants by Category: Foodservice Value 2024-2029

Table 39 - Forecast Full-Service Restaurants by Category: % Units/Outlets Growth 2024-2029

Table 40 - Forecast Sales in Full-Service Restaurants by Category: % Transaction Growth 2024-2029

Table 41 - Forecast Sales in Full-Service Restaurants by Category: % Foodservice Value Growth 2024-2029

Limited-Service Restaurants in the Netherlands

KEY DATA FINDINGS

2024 DEVELOPMENTS

Limited-service restaurants show positive growth in 2024, although the number of outlets declines

Chained players outperform independents thanks to better resources

McDonald's retains top position but faces ongoing competition, especially from Domino's

PROSPECTS AND OPPORTUNITIES

Healthy growth forecast for limited-service restaurants

Third-party delivery will be major driver of sales for the category in the coming years

Investments in new technologies are key to achieving growth

CATEGORY DATA

Table 42 - Limited-Service Restaurants by Category: Units/Outlets 2019-2024

Table 43 - Sales in Limited-Service Restaurants by Category: Number of Transactions 2019-2024

Table 44 - Sales in Limited-Service Restaurants by Category: Foodservice Value 2019-2024

Table 45 - Limited-Service Restaurants by Category: % Units/Outlets Growth 2019-2024

Table 46 - Sales in Limited-Service Restaurants by Category: % Transaction Growth 2019-2024

Table 47 - Sales in Limited-Service Restaurants by Category: % Foodservice Value Growth 2019-2024

Table 48 - GBO Company Shares in Chained Limited-Service Restaurants: % Foodservice Value 2020-2024

Table 49 - GBN Brand Shares in Chained Limited-Service Restaurants: % Foodservice Value 2021-2024

Table 50 - Forecast Limited-Service Restaurants by Category: Units/Outlets 2024-2029

Table 51 - Forecast Sales in Limited-Service Restaurants by Category: Number of Transactions 2024-2029

Table 52 - Forecast Sales in Limited-Service Restaurants by Category: Foodservice Value 2024-2029

Table 53 - Forecast Limited-Service Restaurants by Category: % Units/Outlets Growth 2024-2029

Table 54 - Forecast Sales in Limited-Service Restaurants by Category: % Transaction Growth 2024-2029

Table 55 - Forecast Sales in Limited-Service Restaurants by Category: % Foodservice Value Growth 2024-2029

Self-Service Cafeterias in the Netherlands

KEY DATA FINDINGS

2024 DEVELOPMENTS

Healthy RSP growth for self-service cafeterias in 2024

La Place remains the undisputed leader ahead of Ikea

Ikea Restaurant offers meat-free value-for-money menus

PROSPECTS AND OPPORTUNITIES

Profitability will remain a challenge as costs continue to rise

Dine-in consumption will be the main focus for self-service cafeterias in the years ahead

Changes ahead for leading player La Place

CATEGORY DATA

Table 56 - Self-Service Cafeterias: Units/Outlets 2019-2024

Table 57 - Sales in Self-Service Cafeterias: Number of Transactions 2019-2024

Table 58 - Sales in Self-Service Cafeterias: Foodservice Value 2019-2024

Table 59 - Sales in Self-Service Cafeterias: % Units/Outlets Growth 2019-2024

Table 60 - Sales in Self-Service Cafeterias: % Transaction Growth 2019-2024

Table 61 - Sales in Self-Service Cafeterias: % Foodservice Value Growth 2019-2024

Table 62 - GBO Company Shares in Chained Self-Service Cafeterias: % Foodservice Value 2020-2024

Table 63 - GBN Brand Shares in Chained Self-Service Cafeterias: % Foodservice Value 2021-2024

Table 64 - Forecast Self-Service Cafeterias: Units/Outlets 2024-2029

Table 65 - Forecast Sales in Self-Service Cafeterias: Number of Transactions 2024-2029

Table 66 - Forecast Sales in Self-Service Cafeterias: Foodservice Value 2024-2029

Table 67 - Forecast Self-Service Cafeterias: % Units/Outlets Growth 2024-2029

Table 68 - Forecast Sales in Self-Service Cafeterias: % Transaction Growth 2024-2029

Table 69 - Forecast Sales in Self-Service Cafeterias: % Foodservice Value Growth 2024-2029

Street Stalls/Kiosks in the Netherlands

KEY DATA FINDINGS

2024 DEVELOPMENTS

Street stalls/kiosks remains underdeveloped in 2024

Kiosk chain remains the leading payer due to its presence at train stations

NS Group promotes sustainability and healthy choices to attract interest

PROSPECTS AND OPPORTUNITIES

Modest increase likely for foodservice RSP as the category faces strong competition

Limited options for street stalls/kiosks to develop new fulfilment options

Competition set to intensify at major public transport hubs

CATEGORY DATA

Table 70 - Street Stalls/Kiosks: Units/Outlets 2019-2024

Table 71 - Sales in Street Stalls/Kiosks: Number of Transactions 2019-2024

Table 72 - Sales in Street Stalls/Kiosks: Foodservice Value 2019-2024

Table 73 - Street Stalls/Kiosks: % Units/Outlets Growth 2019-2024

Table 74 - Sales in Street Stalls/Kiosks: % Transaction Growth 2019-2024

Table 75 - Sales in Street Stalls/Kiosks: % Foodservice Value Growth 2019-2024

Table 76 - GBO Company Shares in Chained Street Stalls/Kiosks: % Foodservice Value 2020-2024

Table 77 - GBN Brand Shares in Chained Street Stalls/Kiosks: % Foodservice Value 2021-2024

Table 78 - Forecast Street Stalls/Kiosks: Units/Outlets 2024-2029

Table 79 - Forecast Sales in Street Stalls/Kiosks: Number of Transactions 2024-2029

Table 80 - Forecast Sales in Street Stalls/Kiosks: Foodservice Value 2024-2029

Table 81 - Forecast Street Stalls/Kiosks: % Units/Outlets Growth 2024-2029

Table 82 - Forecast Sales in Street Stalls/Kiosks: % Transaction Growth 2024-2029

Table 83 - Forecast Sales in Street Stalls/Kiosks: % Foodservice Value Growth 2024-2029

Consumer Foodservice By Location in the Netherlands

KEY DATA FINDINGS

2024 DEVELOPMENTS

Lower-than-expected incoming tourism limits growth of consumer foodservice by location in 2024

McDonald's remains the leading player overall, combining multiple types of fulfilment

Domino's expands its network of outlets to improve nationwide coverage

PROSPECTS AND OPPORTUNITIES

Grocery retailers will step up their efforts in an attempt to vie for share

Consumer foodservice through travel will see positive development

Consumer foodservice players will seek to offer convenience and special experiences

CATEGORY DATA

Table 84 - Consumer Foodservice by Location: Units/Outlets 2019-2024

Table 85 - Sales in Consumer Foodservice by Location: Number of Transactions 2019-2024

Table 86 - Sales in Consumer Foodservice by Location: Foodservice Value 2019-2024

Table 87 - Consumer Foodservice by Location: % Units/Outlets Growth 2019-2024

Table 88 - Sales in Consumer Foodservice by Location: % Transaction Growth 2019-2024

Table 89 - Sales in Consumer Foodservice by Location: % Foodservice Value Growth 2019-2024

Table 90 - Consumer Foodservice through Standalone: Units/Outlets 2019-2024

Table 91 - Sales in Consumer Foodservice through Standalone: Number of Transactions 2019-2024

Table 92 - Sales in Consumer Foodservice through Standalone: Foodservice Value 2019-2024

Table 93 - Consumer Foodservice through Standalone: % Units/Outlets Growth 2019-2024

Table 94 - Sales in Consumer Foodservice through Standalone: % Transaction Growth 2019-2024

Table 95 - Sales in Consumer Foodservice through Standalone: % Foodservice Value Growth 2019-2024

Table 96 - Consumer Foodservice through Leisure: Units/Outlets 2019-2024

Table 97 - Sales in Consumer Foodservice through Leisure: Number of Transactions 2019-2024

Table 98 - Sales in Consumer Foodservice through Leisure: Foodservice Value 2019-2024

Table 99 - Consumer Foodservice through Leisure: % Units/Outlets Growth 2019-2024

Table 100 - Sales in Consumer Foodservice through Leisure: % Transaction Growth 2019-2024

Table 101 - Sales in Consumer Foodservice through Leisure: % Foodservice Value Growth 2019-2024

Table 102 - Consumer Foodservice through Retail: Units/Outlets 2019-2024

Table 103 - Sales in Consumer Foodservice through Retail: Number of Transactions 2019-2024

Table 104 - Sales in Consumer Foodservice through Retail: Foodservice Value 2019-2024

Table 105 - Consumer Foodservice through Retail: % Units/Outlets Growth 2019-2024

Table 106 - Sales in Consumer Foodservice through Retail: % Transaction Growth 2019-2024

Table 107 - Sales in Consumer Foodservice through Retail: % Foodservice Value Growth 2019-2024

Table 108 - Consumer Foodservice through Lodging: Units/Outlets 2019-2024

Table 109 - Sales in Consumer Foodservice through Lodging: Number of Transactions 2019-2024

Table 110 - Sales in Consumer Foodservice through Lodging: Foodservice Value 2019-2024

Table 111 - Consumer Foodservice through Lodging: % Units/Outlets Growth 2019-2024

Table 112 - Sales in Consumer Foodservice through Lodging: % Transaction Growth 2019-2024

Table 113 - Sales in Consumer Foodservice through Lodging: % Foodservice Value Growth 2019-2024

Table 114 - Consumer Foodservice through Travel: Units/Outlets 2019-2024

Table 115 - Sales in Consumer Foodservice through Travel: Number of Transactions 2019-2024

Table 116 - Sales in Consumer Foodservice through Travel: Foodservice Value 2019-2024

Table 117 - Consumer Foodservice through Travel: % Units/Outlets Growth 2019-2024

Table 118 - Sales in Consumer Foodservice through Travel: % Transaction Growth 2019-2024

Table 119 - Sales in Consumer Foodservice through Travel: % Foodservice Value Growth 2019-2024

Table 120 - Forecast Consumer Foodservice by Location: Units/Outlets 2024-2029

Table 121 - Forecast Sales in Consumer Foodservice by Location: Number of Transactions 2024-2029

Table 122 - Forecast Sales in Consumer Foodservice by Location: Foodservice Value 2024-2029

Table 123 - Forecast Consumer Foodservice by Location: % Units/Outlets Growth 2024-2029

Table 124 - Forecast Sales in Consumer Foodservice by Location: % Transaction Growth 2024-2029

Table 125 - Forecast Sales in Consumer Foodservice by Location: % Foodservice Value Growth 2024-2029

Table 126 - Forecast Consumer Foodservice through Standalone: Units/Outlets 2024-2029

Table 127 - Forecast Sales in Consumer Foodservice through Standalone: Number of Transactions 2024-2029

Table 128 - Forecast Sales in Consumer Foodservice through Standalone: Foodservice Value 2024-2029

Table 129 - Forecast Consumer Foodservice through Standalone: % Units/Outlets Growth 2024-2029

Table 130 - Forecast Sales in Consumer Foodservice through Standalone: % Transaction Growth 2024-2029

Table 131 - Forecast Sales in Consumer Foodservice through Standalone: % Foodservice Value Growth 2024-2029

Table 132 - Forecast Consumer Foodservice through Leisure: Units/Outlets 2024-2029

Table 133 - Forecast Sales in Consumer Foodservice through Leisure: Number of Transactions 2024-2029

Table 134 - Forecast Sales in Consumer Foodservice through Leisure: Foodservice Value 2024-2029

Table 135 - Forecast Consumer Foodservice through Leisure: % Units/Outlets Growth 2024-2029

Table 136 - Forecast Sales in Consumer Foodservice through Leisure: % Transaction Growth 2024-2029

Table 137 - Forecast Sales in Consumer Foodservice through Leisure: % Foodservice Value Growth 2024-2029

Table 138 - Forecast Consumer Foodservice through Retail: Units/Outlets 2024-2029

Table 139 - Forecast Sales in Consumer Foodservice through Retail: Number of Transactions 2024-2029

Table 140 - Forecast Sales in Consumer Foodservice through Retail: Foodservice Value 2024-2029

Table 141 - Forecast Consumer Foodservice through Retail: % Units/Outlets Growth 2024-2029

Table 142 - Forecast Sales in Consumer Foodservice through Retail: % Transaction Growth 2024-2029

Table 143 - Forecast Sales in Consumer Foodservice through Retail: % Foodservice Value Growth 2024-2029

Table 144 - Forecast Consumer Foodservice through Lodging: Units/Outlets 2024-2029

Table 145 - Forecast Sales in Consumer Foodservice through Lodging: Number of Transactions 2024-2029

Table 146 - Forecast Sales in Consumer Foodservice through Lodging: Foodservice Value 2024-2029

Table 147 - Forecast Consumer Foodservice through Lodging: % Units/Outlets Growth 2024-2029

Table 148 - Forecast Sales in Consumer Foodservice through Lodging: % Transaction Growth 2024-2029

Table 149 - Forecast Sales in Consumer Foodservice through Lodging: % Foodservice Value Growth 2024-2029

Table 150 - Forecast Consumer Foodservice through Travel: Units/Outlets 2024-2029

Table 151 - Forecast Sales in Consumer Foodservice through Travel: Number of Transactions 2024-2029

Table 152 - Forecast Sales in Consumer Foodservice through Travel: Foodservice Value 2024-2029

Table 153 - Forecast Consumer Foodservice through Travel: % Units/Outlets Growth 2024-2029

Table 154 - Forecast Sales in Consumer Foodservice through Travel: % Transaction Growth 2024-2029

Table 155 - Forecast Sales in Consumer Foodservice through Travel: % Foodservice Value Growth 2024-2029

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.