



Consumer Foodservice in Denmark

March 2026

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Consumer Foodservice in Denmark

EXECUTIVE SUMMARY

Players focus on offering value and experiences to counter inflation

Key Data Findings

INDUSTRY PERFORMANCE

Price increases drive value growth

Fulfillment a growing focus of foodservice operators

Operators look to build loyalty through new concepts and digital engagement

WHAT'S NEXT?

Bright outlook for consumer foodservice as the economy improves

Players expected to focus on service delivery and location strategies to win share

Localisation and food waste strategies help tackle sustainability concerns

COMPETITIVE LANDSCAPE

McDonald's retains the lead

Pincho Nation benefits from offering experience-driven dining

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Juice/smoothie bars ride the wave of healthy convenience

Players look for ways to encourage consumers to eat in

WHAT'S NEXT?

Cafés/bars set to bounce back over the forecast period

Hybrid formats could help cafés/bars better meet the needs of modern consumers

Sustainability strategies set to feature prominently over the forecast period

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2025 DEVELOPMENTS

Players focus on quality menus and experiences to deliver strong growth in 2025

INDUSTRY PERFORMANCE

Full-service restaurants deliver strong growth despite challenges

Consumers favour familiar menus

Operators focus on the whole experience to attract diners

WHAT'S NEXT?

Players expected to focus on adding value

Improving the dining experience could be key to growth

New project aims to introduce more plant-based dishes into menus

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INDUSTRY PERFORMANCE

Subway returns to Denmark as limited-service restaurants see modest growth

Latin flavours capture the imagination of Danish diners

Players adopt new strategies to encourage loyalty and repeat visits

WHAT'S NEXT?

Limited-service restaurants set to grow and develop thanks to sustained demand

Digitalisation strategies set to take centre stage

Players set to focus on simple, personal and unique services and experiences

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Self-Service Cafeterias in Denmark

KEY DATA FINDINGS

2025 DEVELOPMENTS

A positive year for self-service cafeterias

INDUSTRY PERFORMANCE

Self-service cafeterias see strong growth thanks to convenient and affordable positioning

Chained operators dominate through key locations

Ikea cuts menu prices to attract shoppers

WHAT'S NEXT?

Self-service cafeterias set to continue benefiting from their convenience and value

Delivering increased flexibility and customisation offers scope for development

Experiences a growing factor in the success of foodservice operators

COMPETITIVE LANDSCAPE

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Pincho Nation taps into the demand for engaging dining experiences

Chained operators in a better position to meet the needs of consumers

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Street stalls/kiosks lose some of their key advantages

INDUSTRY PERFORMANCE

Street stalls/kiosks see falling sales as consumers switch to other options

Independent operators prove slightly more resilient thanks to greater flexibility

Players adjust their offer as part of efforts to sustain sales

WHAT'S NEXT?

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Street stalls/kiosks could lose relevance as competition grows

Players explore opportunities in new locations

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KEY DATA FINDINGS

2025 DEVELOPMENTS

Standalone locations dominate but growth is seen across the market

INDUSTRY PERFORMANCE

Lodging locations expand reach by targeting locals
Standalone outlets show resilience by adapting to evolving market demands
Consumers balance quality with value depending on the dining situation

WHAT'S NEXT?

Hotels expected to focus on promoting their restaurants as standalone locations
Positive outlook for standalone locations
Players will need to exploit the strengths of their locations to succeed
Urbanisation and an ageing population expected to influence the market's development

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