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Consumer Foodservice in the Netherlands

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Consumer Foodservice in the Netherlands

EXECUTIVE SUMMARY

Mixed picture for consumer foodservice in 2025

KEY DATA FINDINGS

INDUSTRY PERFORMANCE

Foodservice faces further rise in costs in 2025

Growth of delivery and takeaway under pressure

McDonald's launches new AI feature which creates unique family story

WHAT'S NEXT?

Evolving habits will benefit foodservice in the years ahead

Technology will help reward and attract new and returning customers

Technology will help to streamline operations and make it more sustainable

COMPETITIVE LANDSCAPE

McDonald's leads in a competitive field

Domestic player Wakuli enjoys growth

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Specialist coffee and tea shops sees highest growth

Online ordering is less common, but growing rapidly

WHAT'S NEXT?

Positive outlook for cafés/bars, although inflation is a significant factor

Specialist coffee and tea shops will boost the popularity of takeaway

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INDUSTRY PERFORMANCE

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Growing interest in exotic new cuisines drives growth of other full-service restaurants

Increased costs make it difficult to deliver value for money

WHAT'S NEXT?

Modest growth expected for full-service restaurants

Full-service restaurants will create additional streams of income through take-away and home delivery

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Rising costs of ingredients impacts the affordability of category

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INDUSTRY PERFORMANCE

Higher costs lead to value growth in 2025

Chained self-service cafeterias outperform independent outlets

Even larger players have to make changes due to rising costs

WHAT'S NEXT?

Moderate growth expected over the forecast period

Players will seek to reach younger consumers with more takeaway and delivery options

La Place uses well-known chefs to create new dishes for its menu

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INDUSTRY PERFORMANCE

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Independents develop new menu items to help stand out from the crowd

Increased competition from grocery retailers threatens category growth

WHAT'S NEXT?

Street stalls/kiosks set to face restrictions
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INDUSTRY PERFORMANCE

Foodservice through travel outpaces lodging, boosted by tourism recovery and social media influence
Consumers look for special food experiences during travel and leisure time
On-the-go consumption offers different locations new opportunities

WHAT'S NEXT?

Operators of travel-related locations will invest in new locations for foodservice outlets
Standalone consumer foodservice will likely see average growth
VAT increase in 2026 could limit the growth of lodging, leisure and travel locations
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