



Consumer Foodservice in Norway

March 2026

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Consumer Foodservice in Norway

EXECUTIVE SUMMARY

Consumer foodservice continues to develop and grow in Norway

KEY DATA FINDINGS

INDUSTRY PERFORMANCE

Positive sales dynamics through premiumisation and price rises
Development of delivery, takeaway and drive-through options
Economising and new experiences are important aspects of demand

WHAT'S NEXT?

Positive outlook for consumer foodservice in Norway
Digitalisation and menu developments are among the anticipated key innovations
Sustainability is set to be a key priority

COMPETITIVE LANDSCAPE

McDonald's and Burger King lead but domestic chains remain significant
Dolly Dimple's sees the highest growth rate in foodservice value sales
Experiential formats and traditional cooking styles

CHANNELS

Independents lead but chained operators continue to develop and grow

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Less mature formats drive growth in highly competitive cafés/bars

INDUSTRY PERFORMANCE

Specialist coffee and tea shops exert pressure on bars/pubs
Juice/smoothie bars posts the fastest growth in foodservice value sales from a low base

Value for money pressures shape the strategies of chained cafés

WHAT'S NEXT?

Cafés/bars to gain a competitive edge through personalised engagement and atmosphere-driven experience

Digital fulfillment transformation in chains

Digital innovation and social media as growth drivers in cafés/bars

COMPETITIVE LANDSCAPE

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Rapid expansion and strategic momentum behind Joe & The Juice's growth

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KEY DATA FINDINGS

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Players work hard to stimulate traffic in a tough business environment

INDUSTRY PERFORMANCE

Economic pressures constrain the performance of full-service restaurants

North American full-service restaurants generate the highest foodservice value sales growth

Value strategies to the fore

WHAT'S NEXT?

Premiumisation and experiential dining to stimulate foodservice value sales growth

Digitalisation of the full-service dining experience

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Chained operators lead investment in limited-service restaurants
Ice cream format posts fastest value sales growth within limited-service restaurants
Convenience and affordability are among the top drivers for operators

WHAT'S NEXT?

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Convenience-led growth to drive investment in delivery and drive-through services
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COMPETITIVE LANDSCAPE

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KEY DATA FINDINGS

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INDUSTRY PERFORMANCE

Key brand investments add dynamism to the category

Leading chains shaping Norway's self-service cafeteria landscape

Cost-of-living crisis pressures demand

WHAT'S NEXT?

From traditional format to contemporary dining experience

Digital transformation in Norway's self-service cafeterias

Waste reduction and local sourcing

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Emerging concepts gain visibility and traction

Value for money preoccupation amid cost-of-living pressures

WHAT'S NEXT?

Limited growth prospects because of competitive pressure but bright spots remain

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KEY DATA FINDINGS

2025 DEVELOPMENTS

Non-standalone exert pressure on standalone locations amid post-pandemic normalisation

INDUSTRY PERFORMANCE

Retail locations lead value sales growth in non-standalone foodservice

Standalone remains the largest location type despite rising competition

Value for money remains a key factor in consumer foodservice

WHAT'S NEXT?

Non-standalone channels to make gains

Digital transformation is helping to shape the direction of travel in foodservice

Rising influence of younger consumers on dining experiences

COMPETITIVE LANDSCAPE

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