



# Consumer Foodservice in Germany

March 2026

Table of Contents

## Consumer Foodservice in Germany

### EXECUTIVE SUMMARY

Weak performance for consumer foodservice

### KEY DATA FINDINGS

#### INDUSTRY PERFORMANCE

A challenging period for consumer foodservice

Takeaway and online deliveries gain traction although dining-in is favoured by consumers

Digitalisation enables operators to offer promotions and build loyalty

#### WHAT'S NEXT?

Lower VAT on eat-in provides some grounds for optimism

Experiences, drink innovations and diverse cuisine is used to entice consumers

Price carries heavier weight over sustainability

#### COMPETITIVE LANDSCAPE

McDonald's Deutschland Inc holds a strong lead

Regional and local concepts gain traction

Opportunities for brands to thrive despite intense competition

#### CHANNELS

Independent foodservice operators face financial challenges

Local businesses differentiate with sustainable and locally-sourced options

#### MARKET DATA

Table 1 - Units, Transactions and Value Sales in Consumer Foodservice 2020-2025

Table 2 - Units, Transactions and Value Sales in Consumer Foodservice: % Growth 2020-2025

Table 3 - Consumer Foodservice by Independent vs Chained by Type: Units/Outlets 2025

Table 4 - Consumer Foodservice by Independent vs Chained: % Foodservice Value 2020-2025

Table 5 - Sales in Consumer Foodservice by Food vs Drink Split: % Foodservice Value 2020-2025

Table 6 - Sales in Consumer Foodservice by Food vs Drink Split by Type: % Foodservice Value 2025

Table 7 - Sales in Consumer Foodservice by Location: % Foodservice Value 2020-2025

Table 8 - Sales in Consumer Foodservice by Fulfillment: % Foodservice Value 2020-2025

Table 9 - GBO Company Shares in Chained Consumer Foodservice: % Foodservice Value 2021-2025

Table 10 - GBN Brand Shares in Chained Consumer Foodservice: % Foodservice Value 2022-2025

Table 11 - GBN Brand Shares in Chained Consumer Foodservice: Units/Outlets 2025

Table 12 - Forecast Units, Transactions and Value Sales in Consumer Foodservice 2025-2030

Table 13 - Forecast Units, Transactions and Value Sales in Consumer Foodservice: % Growth 2025-2030

#### DISCLAIMER

#### SOURCES

Summary 1 - Research Sources

## Cafés/Bars in Germany

### KEY DATA FINDINGS

#### 2025 DEVELOPMENTS

Challenging trading period for cafés/bars

#### INDUSTRY PERFORMANCE

Cafés/bars struggle amid economic uncertainty

Cafés remain popular as pubs lose relevancy with young adults  
Consumers cut foodservice expenditure to economise

#### WHAT'S NEXT?

Challenging outlook for the cafés/bars category  
Reinvention from experience-driven venues  
Players blend sustainability into business model

#### COMPETITIVE LANDSCAPE

McCafé holds the lead in highly fragmented landscape  
Coffee Fellows achieves dynamic growth in challenging market  
Independents play a major role in category

#### CATEGORY DATA

Table 14 - Cafés/Bars by Category: Units/Outlets 2020-2025  
Table 15 - Sales in Cafés/Bars by Category: Number of Transactions 2020-2025  
Table 16 - Sales in Cafés/Bars by Category: Foodservice Value 2020-2025  
Table 17 - Cafés/Bars by Category: % Units/Outlets Growth 2020-2025  
Table 18 - Sales in Cafés/Bars by Category: % Transaction Growth 2020-2025  
Table 19 - Sales in Cafés/Bars by Category: % Foodservice Value Growth 2020-2025  
Table 20 - GBO Company Shares in Chained Cafés/Bars: % Foodservice Value 2021-2025  
Table 21 - GBN Brand Shares in Chained Cafés/Bars: % Foodservice Value 2022-2025  
Table 22 - Forecast Cafés/Bars by Category: Units/Outlets 2025-2030  
Table 23 - Forecast Sales in Cafés/Bars by Category: Number of Transactions 2025-2030  
Table 24 - Forecast Sales in Cafés/Bars by Category: Foodservice Value 2025-2030  
Table 25 - Forecast Cafés/Bars by Category: % Units/Outlets Growth 2025-2030  
Table 26 - Forecast Sales in Cafés/Bars by Category: % Transaction Growth 2025-2030  
Table 27 - Forecast Sales in Cafés/Bars by Category: % Foodservice Value Growth 2025-2030

#### DISCLAIMER

[Full-Service Restaurants in Germany](#)

#### KEY DATA FINDINGS

##### 2025 DEVELOPMENTS

Stagnant performance reflects a challenging environment

##### INDUSTRY PERFORMANCE

Flat performance as high prices suppress demand  
Asian full-service restaurants remain popular  
More demanding customers proves a challenge

#### WHAT'S NEXT?

Full-service restaurants will remain under pressure  
Food delivery platforms are predicted to gain traction in consumer foodservice  
Digitalisation to enhance operations management

#### COMPETITIVE LANDSCAPE

L'Osteria continues to expand in Germany  
Italian food and aperitif culture boosts newcomer '60 seconds to Napoli'  
Growing diversity of independent players

#### CATEGORY DATA

Table 28 - Full-Service Restaurants by Category: Units/Outlets 2020-2025

Table 29 - Sales in Full-Service Restaurants by Category: Number of Transactions 2020-2025  
Table 30 - Sales in Full-Service Restaurants by Category: Foodservice Value 2020-2025  
Table 31 - Full-Service Restaurants by Category: % Units/Outlets Growth 2020-2025  
Table 32 - Sales in Full-Service Restaurants by Category: % Transaction Growth 2020-2025  
Table 33 - Sales in Full-Service Restaurants by Category: % Foodservice Value Growth 2020-2025  
Table 34 - GBO Company Shares in Chained Full-Service Restaurants: % Foodservice Value 2021-2025  
Table 35 - GBN Brand Shares in Chained Full-Service Restaurants: % Foodservice Value 2022-2025  
Table 36 - Forecast Full-Service Restaurants by Category: Units/Outlets 2025-2030  
Table 37 - Forecast Sales in Full-Service Restaurants by Category: Number of Transactions 2025-2030  
Table 38 - Forecast Sales in Full-Service Restaurants by Category: Foodservice Value 2025-2030  
Table 39 - Forecast Full-Service Restaurants by Category: % Units/Outlets Growth 2025-2030  
Table 40 - Forecast Sales in Full-Service Restaurants by Category: % Transaction Growth 2025-2030  
Table 41 - Forecast Sales in Full-Service Restaurants by Category: % Foodservice Value Growth 2025-2030

## DISCLAIMER

## Limited-Service Restaurants in Germany

### KEY DATA FINDINGS

#### 2025 DEVELOPMENTS

Solid performance in a fast-moving category

#### INDUSTRY PERFORMANCE

Limited-service restaurants demonstrate resilience

Diverse food options boost limited-service appeal

Conservative purchasing behaviour dampens demand

#### WHAT'S NEXT?

Players with eat-in offerings stand to benefit from lower VAT

Delivery platforms enhance the appeal of limited-service restaurants

AI Tools help to improve the customer journey

#### COMPETITIVE LANDSCAPE

Competitive landscape led by global heavyweights

Doner kebab and niche chains emerge

#### CATEGORY DATA

Table 42 - Limited-Service Restaurants by Category: Units/Outlets 2020-2025  
Table 43 - Sales in Limited-Service Restaurants by Category: Number of Transactions 2020-2025  
Table 44 - Sales in Limited-Service Restaurants by Category: Foodservice Value 2020-2025  
Table 45 - Limited-Service Restaurants by Category: % Units/Outlets Growth 2020-2025  
Table 46 - Sales in Limited-Service Restaurants by Category: % Transaction Growth 2020-2025  
Table 47 - Sales in Limited-Service Restaurants by Category: % Foodservice Value Growth 2020-2025  
Table 48 - GBO Company Shares in Chained Limited-Service Restaurants: % Foodservice Value 2021-2025  
Table 49 - GBN Brand Shares in Chained Limited-Service Restaurants: % Foodservice Value 2022-2025  
Table 50 - Forecast Limited-Service Restaurants by Category: Units/Outlets 2025-2030  
Table 51 - Forecast Sales in Limited-Service Restaurants by Category: Number of Transactions 2025-2030  
Table 52 - Forecast Sales in Limited-Service Restaurants by Category: Foodservice Value 2025-2030  
Table 53 - Forecast Limited-Service Restaurants by Category: % Units/Outlets Growth 2025-2030  
Table 54 - Forecast Sales in Limited-Service Restaurants by Category: % Transaction Growth 2025-2030  
Table 55 - Forecast Sales in Limited-Service Restaurants by Category: % Foodservice Value Growth 2025-2030

## DISCLAIMER

## Self-Service Cafeterias in Germany

### KEY DATA FINDINGS

#### 2025 DEVELOPMENTS

Self-service cafeterias face declining sales

#### INDUSTRY PERFORMANCE

Lacklustre performance as self-service cafeterias lose further ground

Evolving to meet changing preferences with plant-based and health-oriented meals

Consumers seek a balance between price, quality, and experience

#### WHAT'S NEXT?

Gloomy outlook for self-service cafeterias

Players need to deliver value-driven experiences

Sustainable and digitalisation must be embraced

#### COMPETITIVE LANDSCAPE

Tank & Rast leads in outlets number

Ikea Restaurant achieves dynamic growth over 2025

Chained players hold an advantage over independents

#### CATEGORY DATA

Table 56 - Self-Service Cafeterias: Units/Outlets 2020-2025

Table 57 - Sales in Self-Service Cafeterias: Number of Transactions 2020-2025

Table 58 - Sales in Self-Service Cafeterias: Foodservice Value 2020-2025

Table 59 - Sales in Self-Service Cafeterias: % Units/Outlets Growth 2020-2025

Table 60 - Sales in Self-Service Cafeterias: % Transaction Growth 2020-2025

Table 61 - Sales in Self-Service Cafeterias: % Foodservice Value Growth 2020-2025

Table 62 - GBO Company Shares in Chained Self-Service Cafeterias: % Foodservice Value 2021-2025

Table 63 - GBN Brand Shares in Chained Self-Service Cafeterias: % Foodservice Value 2022-2025

Table 64 - Forecast Self-Service Cafeterias: Units/Outlets 2025-2030

Table 65 - Forecast Sales in Self-Service Cafeterias: Number of Transactions 2025-2030

Table 66 - Forecast Sales in Self-Service Cafeterias: Foodservice Value 2025-2030

Table 67 - Forecast Self-Service Cafeterias: % Units/Outlets Growth 2025-2030

Table 68 - Forecast Sales in Self-Service Cafeterias: % Transaction Growth 2025-2030

Table 69 - Forecast Sales in Self-Service Cafeterias: % Foodservice Value Growth 2025-2030

#### DISCLAIMER

## Street Stalls/Kiosks in Germany

### KEY DATA FINDINGS

#### 2025 DEVELOPMENTS

Street stalls/kiosks draw in consumers seeking low-cost meals

#### INDUSTRY PERFORMANCE

Affordability and convenience underpins growth in street stalls and kiosks

Ready to eat hot meals and snack boxes gained popularity

Nutritional transparency and sustainable credentials can give players an advantage

#### WHAT'S NEXT?

Growing proportion of food sales via street stalls/kiosks

Digitalisation and sustainable trends to shape category development

## COMPETITIVE LANDSCAPE

Autobahn Tank & Rast takes lead in highly fragmented category

Wurstteufel stands out as the most dynamic player

Small-scale, locally operated stalls continue to thrive

## CATEGORY DATA

Table 70 - Street Stalls/Kiosks: Units/Outlets 2020-2025

Table 71 - Sales in Street Stalls/Kiosks: Number of Transactions 2020-2025

Table 72 - Sales in Street Stalls/Kiosks: Foodservice Value 2020-2025

Table 73 - Street Stalls/Kiosks: % Units/Outlets Growth 2020-2025

Table 74 - Sales in Street Stalls/Kiosks: % Transaction Growth 2020-2025

Table 75 - Sales in Street Stalls/Kiosks: % Foodservice Value Growth 2020-2025

Table 76 - GBO Company Shares in Chained Street Stalls/Kiosks: % Foodservice Value 2021-2025

Table 77 - GBN Brand Shares in Chained Street Stalls/Kiosks: % Foodservice Value 2022-2025

Table 78 - Forecast Street Stalls/Kiosks: Units/Outlets 2025-2030

Table 79 - Forecast Sales in Street Stalls/Kiosks: Number of Transactions 2025-2030

Table 80 - Forecast Sales in Street Stalls/Kiosks: Foodservice Value 2025-2030

Table 81 - Forecast Street Stalls/Kiosks: % Units/Outlets Growth 2025-2030

Table 82 - Forecast Sales in Street Stalls/Kiosks: % Transaction Growth 2025-2030

Table 83 - Forecast Sales in Street Stalls/Kiosks: % Foodservice Value Growth 2025-2030

## DISCLAIMER

[Consumer Foodservice By Location in Germany](#)

## KEY DATA FINDINGS

### 2025 DEVELOPMENTS

Mixed performance depending on the location

## INDUSTRY PERFORMANCE

Retail locations continue to prove popular

Standalone locations face cost and labour challenges

Economic pressures weigh on consumer foodservice through leisure

## WHAT'S NEXT?

Expansion of retail locations to support foodservice sales

Pressure on consumer foodservice through standalone outlets

Consumer foodservice has opportunity to address demographic shifts

## COMPETITIVE LANDSCAPE

Global limited-service restaurants and café brands lead overall

Standalone foodservice locations take largest share

## CATEGORY DATA

Table 84 - Consumer Foodservice by Location: Units/Outlets 2020-2025

Table 85 - Sales in Consumer Foodservice by Location: Number of Transactions 2020-2025

Table 86 - Sales in Consumer Foodservice by Location: Foodservice Value 2020-2025

Table 87 - Consumer Foodservice by Location: % Units/Outlets Growth 2020-2025

Table 88 - Sales in Consumer Foodservice by Location: % Transaction Growth 2020-2025

Table 89 - Sales in Consumer Foodservice by Location: % Foodservice Value Growth 2020-2025

Table 90 - Consumer Foodservice Through Standalone: Units/Outlets 2020-2025

Table 91 - Sales in Consumer Foodservice Through Standalone: Number of Transactions 2020-2025

Table 92 - Sales in Consumer Foodservice Through Standalone: Foodservice Value 2020-2025

Table 93 - Consumer Foodservice Through Standalone: % Units/Outlets Growth 2020-2025

Table 94 - Sales in Consumer Foodservice Through Standalone: % Transaction Growth 2020-2025

Table 95 - Sales in Consumer Foodservice Through Standalone: % Foodservice Value Growth 2020-2025

Table 96 - Consumer Foodservice Through Leisure: Units/Outlets 2020-2025

Table 97 - Sales in Consumer Foodservice Through Leisure: Number of Transactions 2020-2025

Table 98 - Sales in Consumer Foodservice Through Leisure: Foodservice Value 2020-2025

Table 99 - Consumer Foodservice Through Leisure: % Units/Outlets Growth 2020-2025

Table 100 - Sales in Consumer Foodservice Through Leisure: % Transaction Growth 2020-2025

Table 101 - Sales in Consumer Foodservice Through Leisure: % Foodservice Value Growth 2020-2025

Table 102 - Consumer Foodservice Through Retail: Units/Outlets 2020-2025

Table 103 - Sales in Consumer Foodservice Through Retail: Number of Transactions 2020-2025

Table 104 - Sales in Consumer Foodservice Through Retail: Foodservice Value 2020-2025

Table 105 - Consumer Foodservice Through Retail: % Units/Outlets Growth 2020-2025

Table 106 - Sales in Consumer Foodservice Through Retail: % Transaction Growth 2020-2025

Table 107 - Sales in Consumer Foodservice Through Retail: % Foodservice Value Growth 2020-2025

Table 108 - Consumer Foodservice Through Lodging: Units/Outlets 2020-2025

Table 109 - Sales in Consumer Foodservice Through Lodging: Number of Transactions 2020-2025

Table 110 - Sales in Consumer Foodservice Through Lodging: Foodservice Value 2020-2025

Table 111 - Consumer Foodservice Through Lodging: % Units/Outlets Growth 2020-2025

Table 112 - Sales in Consumer Foodservice Through Lodging: % Transaction Growth 2020-2025

Table 113 - Sales in Consumer Foodservice Through Lodging: % Foodservice Value Growth 2020-2025

Table 114 - Consumer Foodservice Through Travel: Units/Outlets 2020-2025

Table 115 - Sales in Consumer Foodservice Through Travel: Number of Transactions 2020-2025

Table 116 - Sales in Consumer Foodservice Through Travel: Foodservice Value 2020-2025

Table 117 - Consumer Foodservice Through Travel: % Units/Outlets Growth 2020-2025

Table 118 - Sales in Consumer Foodservice Through Travel: % Transaction Growth 2020-2025

Table 119 - Sales in Consumer Foodservice Through Travel: % Foodservice Value Growth 2020-2025

Table 120 - Forecast Consumer Foodservice by Location: Units/Outlets 2025-2030

Table 121 - Forecast Sales in Consumer Foodservice by Location: Number of Transactions 2025-2030

Table 122 - Forecast Sales in Consumer Foodservice by Location: Foodservice Value 2025-2030

Table 123 - Forecast Consumer Foodservice by Location: % Units/Outlets Growth 2025-2030

Table 124 - Forecast Sales in Consumer Foodservice by Location: % Transaction Growth 2025-2030

Table 125 - Forecast Sales in Consumer Foodservice by Location: % Foodservice Value Growth 2025-2030

Table 126 - Forecast Consumer Foodservice Through Standalone: Units/Outlets 2025-2030

Table 127 - Forecast Sales in Consumer Foodservice Through Standalone: Number of Transactions 2025-2030

Table 128 - Forecast Sales in Consumer Foodservice Through Standalone: Foodservice Value 2025-2030

Table 129 - Forecast Consumer Foodservice Through Standalone: % Units/Outlets Growth 2025-2030

Table 130 - Forecast Sales in Consumer Foodservice Through Standalone: % Transaction Growth 2025-2030

Table 131 - Forecast Sales in Consumer Foodservice Through Standalone: % Foodservice Value Growth 2025-2030

Table 132 - Forecast Consumer Foodservice Through Leisure: Units/Outlets 2025-2030

Table 133 - Forecast Sales in Consumer Foodservice Through Leisure: Number of Transactions 2025-2030

Table 134 - Forecast Sales in Consumer Foodservice Through Leisure: Foodservice Value 2025-2030

Table 135 - Forecast Consumer Foodservice Through Leisure: % Units/Outlets Growth 2025-2030

Table 136 - Forecast Sales in Consumer Foodservice Through Leisure: % Transaction Growth 2025-2030

Table 137 - Forecast Sales in Consumer Foodservice Through Leisure: % Foodservice Value Growth 2025-2030

Table 138 - Forecast Consumer Foodservice Through Retail: Units/Outlets 2025-2030

Table 139 - Forecast Sales in Consumer Foodservice Through Retail: Number of Transactions 2025-2030

Table 140 - Forecast Sales in Consumer Foodservice Through Retail: Foodservice Value 2025-2030

Table 141 - Forecast Consumer Foodservice Through Retail: % Units/Outlets Growth 2025-2030

Table 142 - Forecast Sales in Consumer Foodservice Through Retail: % Transaction Growth 2025-2030

Table 143 - Forecast Sales in Consumer Foodservice Through Retail: % Foodservice Value Growth 2025-2030

Table 144 - Forecast Consumer Foodservice Through Lodging: Units/Outlets 2025-2030

Table 145 - Forecast Sales in Consumer Foodservice Through Lodging: Number of Transactions 2025-2030

Table 146 - Forecast Sales in Consumer Foodservice Through Lodging: Foodservice Value 2025-2030

Table 147 - Forecast Consumer Foodservice Through Lodging: % Units/Outlets Growth 2025-2030

Table 148 - Forecast Sales in Consumer Foodservice Through Lodging: % Transaction Growth 2025-2030

Table 149 - Forecast Sales in Consumer Foodservice Through Lodging: % Foodservice Value Growth 2025-2030

Table 150 - Forecast Consumer Foodservice Through Travel: Units/Outlets 2025-2030

Table 151 - Forecast Sales in Consumer Foodservice Through Travel: Number of Transactions 2025-2030

Table 152 - Forecast Sales in Consumer Foodservice Through Travel: Foodservice Value 2025-2030

Table 153 - Forecast Consumer Foodservice Through Travel: % Units/Outlets Growth 2025-2030

Table 154 - Forecast Sales in Consumer Foodservice Through Travel: % Transaction Growth 2025-2030

Table 155 - Forecast Sales in Consumer Foodservice Through Travel: % Foodservice Value Growth 2025-2030

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