



Euromonitor
International

Consumer Foodservice in Germany

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EXECUTIVE SUMMARY

Weak performance for consumer foodservice

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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

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Consumers cut foodservice expenditure to economise

WHAT'S NEXT?

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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
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Digitalisation to enhance operations management

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Self-service cafeterias face declining sales

INDUSTRY PERFORMANCE

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

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WHAT'S NEXT?

Gloomy outlook for self-service cafeterias

Players need to deliver value-driven experiences

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KEY DATA FINDINGS

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INDUSTRY PERFORMANCE

Affordability and convenience underpins growth in street stalls and kiosks

Ready to eat hot meals and snack boxes gained popularity

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WHAT'S NEXT?

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Digitalisation and sustainable trends to shape category development

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2025 DEVELOPMENTS

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INDUSTRY PERFORMANCE

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WHAT'S NEXT?

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