

Foodservice Market in Germany

Key Figures and Trends 2019 - 2020e - 2021f

To understand, forecast and target
the German foodservice market and its supply chain

Proposal for a multi-client study - November 2020

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Background:

The Covid-19 crisis has severely impacted the foodservice industry in Germany and continues to do so with a second lockdown of bars and restaurants in November and December.

In these uncertain times, the foodservice industry needs a better understanding of how the different types of foodservice outlets, their players and distributors have been affected. To know whether they can continue in the future and if so, for how long. Of course, consumers will continue to rely on restaurants and other foodservice outlets to prepare their meals, and there is **suppressed demand** while we wait for a return to normality.

To provide an answer to this **urgent need to understand and assess the foodservice market**, Gira proposes to provide operational data on the structure of the foodservice market in **Germany**, as well as in additional countries that are key in the Western and Eastern European foodservice landscape: **Belgium, Czech Republic, France, Italy, Poland, Portugal, Spain, the Netherlands and the UK**. This proposal is specifically dedicated to the Belgian foodservice market, however, additional proposals can be sent separately on request.

Scope of the research:

- **Structure of the foodservice market:** Number of foodservice outlets, volume of snacks and meals served, foodservice market in value:
 - Turnover of meals served per year (net €), amount of annual F&B purchases (net €), food cost in %.
 - All beverages are included with those consumed between snacks and meals.
- **Channels:** A focus on social and commercial foodservice sectors and their respective sub-segments:
 - **Social foodservice:**
 - Business & Industry for employee canteens / restaurants
 - Education for school canteens
 - Health & Welfare for hospitals and care homes
 - Other types of “captive” segments including the armed forces and prisons.
 - **Commercial foodservice:**
 - Table service restaurants with sub-segmentation specific to Germany
 - Self-service restaurants such as cafeterias
 - Quick-service restaurants (QSR)/Fast-food outlets that include sub-segments such as burger restaurants, bakeries/sandwich shops, bars, cafés and coffee shops, and other types of QSR concepts specific to Germany
 - Hotels and other types of establishments offering accommodation
 - Other commercial foodservice segments including Transport foodservice, Leisure & Event catering.
- **Players:** Market shares in value of the organised/chained foodservice players in each channel and sub-segment vs independents:
 - **Social foodservice:** Contract caterers.
 - **Commercial foodservice:** Restaurant and QSR chains, hotel chains and other kind of commercial foodservice groups (Transport, Leisure & Event).
- **When:** 2019 - 2020e with preliminary key values and trends through 2021f
 - Gira plans a second publication by the end of 2021, then an annual publication from 2022 onward.

Chapter 1 – A five-page synthesis (PowerPoint)

An executive summary of the main results, forecasts, threats, opportunities and recommendations.

Chapter 2 – Structural Analysis of the Foodservice Market

Excel tables

Segmentation and quantification of the foodservice market.
Split in value and volume by foodservice segments and by players.
Rankings of top foodservice operating chains.

Key facts and comments (PowerPoint)

Main national characteristics.
Future trends – short and medium-term market development by segment.

Chapter 3 – Foodservice purchases and distribution

Excel tables

Segmentation and quantification of the foodservice purchases, of food cost (%).
Split of the value of F&B purchases for the social and commercial foodservice sectors, by type of distribution channel.
Ranking of top foodservice distributors.

Key facts and comments (PowerPoint)

Main national characteristics.
Future trends - short and medium-term market development by channel.

Chapter 4 – Changing Dynamics in Foodservice as a result of Covid-19 (PowerPoint)

Qualitative insights on the impact of the Covid-19 crisis on the foodservice industry and its distribution.
Core trends and dynamics driving the market (*food trends, foodservice versus retail, new consumer demands etc.*).
Opportunities and threats to foodservice players and to their supply chains (*potential failures, new business models, ghost kitchens, multichannel strategies, meal deliveries etc.*).
What foodservice players need from their suppliers (*partnerships, meal services, innovations, digitalisation, health/sustainability focus etc.*)?
How foodservice is expected to recover and how long will it take?
Recommendations.

Gira's comprehensive methodology is tried and tested:

Desk research:

- Official statistics, the trade press, internet resources, company websites etc.
- Gira will make full use of its market knowledge and available analysis and reports on the foodservice markets as well as its regular research on the impact of the Covid-19 crisis.
- *NB: Please note that research must start from scratch due to the current sanitary crisis, which has profoundly changed the structure of the foodservice markets.*

Interviews:

- Gira will conduct **20 telephone qualitative interviews** with key foodservice players and distributors:
 - Large contract caterers, restaurant and QSR chains, as well as independent operators
 - Foodservice distributors
 - Broadline distributors: full-line and specialised delivered wholesalers, cash & carry, logistics providers
 - Food industrial manufacturers, FMCG companies
 - Chefs' associations and other expert sources.
- The **main topics** of the interviews will cover:
 - Interviewee opinions on the evolution of the foodservice equipment rate and take-up rate, the average prices for snacks and meals, the food cost
 - How foodservice currently "markets" its offering to consumers, the evolution in terms of foodservice concepts, dishes offered – what will change significantly?
 - Changing demands of consumers, the evolution of consumption behaviour by type of client, foodservice versus retail?
 - The need for innovative products, the impact and evolution of home delivery, take-away concepts
 - The general approach to food purchasing by foodservice operators
 - The identification of their main buying criteria for products and their choice of suppliers
 - The problems they face with the current supply chain etc.
- The **research and key interviews** will be **conducted by Gira's experienced team of consultants**:
 - **Muriel Régnier** is the **project manager and in charge of the German report**.
 - With 25 years of expertise in foodservice and food industry market research and consultancy in Europe, she has a deep and Europe-wide knowledge of foodservice operators and their supply chains.
 - Gira's consultants are experienced professionals with strong interviewing skills with foodservice executives.

TIMING

Delivery will be 2 months after the founder-client agreement and the subsequent announcement for the research to start. The delivery is planned for the **end of February 2021**, providing that we receive your formal agreement by **December 2020**.

SUBSCRIPTION PRICE

Subscription price for the German report = EUR 6,000 (before any applicable taxes), including a **one-hour free webinar**.
Subscription price including the additional **second publication by the end of 2021 = EUR 10,000** (before any applicable taxes), including a **one-hour free webinar**.

Payment 50% on formal agreement and 50% on delivery of the report.

REPORT

The report will be written in **English**.
Clients will receive an electronic copy of the report in searchable and printable PPT style PDF format.
Hard copies are available at an additional cost of EUR 400 per full report.

PRESENTATION

A one-hour free webinar is offered, during which there will be the possibility for an exchange of ideas and a Q&A session on the findings and recommendations as they apply to your company's specific situation.
In addition and on specific request, Gira will be pleased to make a team presentation/workshop of the findings and conclusions of the study that is tailored to their circumstances for clients ; the cost for this one-day presentation/workshop is **EUR 1,500**.

Invoicing details:

Company Name:
Company Address:

Invoicing contact person:
Invoicing email:
VAT number:

Buyer details:

Buyer first name:
Buyer surname:
Buyer email:
Buyer telephone:

Subscription Prices (before any applicable taxes)

2020 German report: EUR 6,000 ☐

2020 and 2021 German reports: EUR 10,000 ☐

Date of subscription:

Signature:

Operational Excel tables

The structure of the German foodservice market, 2019-2020e-2021f

3 separate Excel Tables will be provided: 2019, 2020e and 2021f

Foodservice Segments	Structure of the foodservice sector			Organised foodservice market***		Structure of foodservice purchases		
	Number of foodservice outlets	Number of meals served (mio/year)	Turnover of meals per year (€ mio)	€ million	Market share in value	Food cost / Cost of Goods Sold (COGS)	Annual food purchases (€ mio)	Average food cost (€ per meal)
Social foodservice					%	%		
of which Business & Industry					%	%		
of which Education					%	%		
of which Health & Welfare, Others*					%	%		
Commercial foodservice					%	%		
of which Full Service Restaurants (FSR)					%	%		
of which Specific national concepts**					%	%		
of which Self Service Restaurants (SS)					%	%		
of which Quick Service Restaurants (QSR)					%	%		
of which Burger QSR					%	%		
of which Bakery / Sandwich					%	%		
of which Bars & cafés / Coffee shops					%	%		
of which Other kind of QSR**					%	%		
of which Hotels & other accommodation					%	%		
of which Others (Transport, Leisure & Event)					%	%		
TOTAL FOODSERVICE					%	%		

* Other captive segments (these include mainly the armed forces, prisons)

** If possible, supply of additional segments specific to Germany (for instance: "Imbissstuben" etc.)

*** Contract caterers, mainly restaurant and QSR chains

NB: meals include snacks; turnover and COGS include all beverages

Source: Gira compilations

Ranking of top chained operators with consolidated market shares

Type of chained operators	Name of chained operators	Leading FS operators market share - 2019 and 2020e
Contract caterers	Compass, Sodexo etc.	Top 5 Market Share: XXX%
Chains	McDonald's etc.	Top 5 Market Share: XXX%

Top 10 chained operators in Germany	Total Foodservice market	Leading FS operators market share - 2019 and 2020e
1	McDonald's	XXX%
2	etc.	
3		
4		
5		
6		
7		
8		
9		
10		

Source: Gira compilations

Split of the value of F&B purchases by channel, 2019-2020e-2021f

Foodservice distribution channels	Total foodservice market	Social foodservice	Commercial foodservice
Delivered wholesalers	%	%	%
Cash & Carry	%	%	%
Logistics Providers	%	%	%
Retail	%	%	%
Producer Direct	%	%	%
Total	100%	100%	100%

NB: 3 separate tables are provided for each year: 2019, 2020e, 2021f

Source: Gira compilations

Ranking of top foodservice distributors with consolidated market shares

Type of distributors	Name of distributors	Leading distributors market share - 2019 and 2020e
C&C operators	METRO C&C, EDEKA, etc.	Top 5 Market Share: XXX%
Delivered wholesalers	CHEF CULINAR, INTERGAST, TRANSGOURMET, SERVICE BUND etc.	Top 5 Market Share: XXX%

Top 10 distributors in Germany	Total Foodservice market	Leading distributors' market share - 2019 and 2020e
1	METRO	XXX%
2	etc.	
3		
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Source: Gira compilations

Muriel Régnier – Foodservice Director

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