

# ATTITUDES TOWARDS FOODSERVICE DELIVERY & TAKEAWAY – GERMANY – 2024

Meet consumers' need for convenience with indulgent, customisable meals and self-collection options. Explore themed group bundles and menu variety tied to this year's events.



Charlotte Sander,  
Research Analyst



# Attitudes Towards Foodservice Delivery & Takeaway – Germany – 2024

## This report looks at the following areas:

- The impact of economic challenges on consumer behaviour.
- Consumer preference for menu variety and premium options.
- Growing interest in sustainable packaging.
- Increasing appeal of order collection over delivery.
- The role of AI in transforming foodservice delivery.
- Trends towards indulgent and less-healthy meal choices.
- Market consolidation and partnerships in grocery and foodservice delivery.



Meet consumers' need for convenience with indulgent, customisable meals and self-collection options. Explore themed group bundles and menu variety tied to this year's events.

## Overview

The rising cost of living has led **73%** of takeaway orderers in Germany to reduce their overall takeaway food orders. Despite economic pressure, **takeaway remains an important part of German consumers' habits, driven by the desire for convenience, variety and indulgence**; **25%** of Germans still order takeaway meals at least once a week.

Notably, **47%** of these consumers view takeaway as a more-affordable alternative to dining out. **Picking up orders has grown by 5pp** from 2023 to 2024, showing how **many seek to treat themselves while minimising spending by saving on service charges**.

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Takeaway meals are seen as a chance to indulge; **pizza and burgers remain the top two takeaway choices in Germany**, and the popularity of fried chicken having increased by 4pp from 2023 to 2024. This can be advantageous for the **2024 sports events that will bring people together over food and drinks**. Promotions tied to wins and teams can enhance meals, while treats to soothe nerves and international dishes cater to global-flavour-loving orderers. Germans seek variety and personalisation in takeaway options, appreciating changing menus (37%), customisable dishes (31%) and options to mix and match (26%).

**After-work specials and themed bundles**, such as those tailored for **wine-and-cheese nights**, can also meet consumer demand for **budget-friendly dining options**.

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## Report Content



### EXECUTIVE SUMMARY

- The five-year outlook for foodservice delivery and takeaway

#### Market context

- Consumers resort to takeaway due to the income squeeze
- New regulations impacting the German foodservice delivery and takeaway market are being implemented
- Competition and use of AI grow

#### Opportunities

- Diversify menu options
- Create group bundles and premium treats
- Enhance pickup and collection services

### MARKET DRIVERS

#### The German economy

- 2024 is expected to remain challenging
  - Graph 1: key economic data, in real terms, 2019-25
- The inflation rate is bouncing back to more conventional levels
- Inflation is still the key factor affecting consumers' finances...
- ...confidence and expenditure
  - Graph 2: financial confidence index, 2022-24
- Takeaway remains popular despite rising prices
- Quality and affordability will resonate as consumer confidence starts to recover
  - Graph 3: financial confidence over the next year, 2023-24

#### Regulations

- Takeaway/home delivery meals remain at 7% VAT
- Takeaway/home delivery is a more affordable option
- PPWR will shape foodservice packaging, despite low multi-use interest
- BMEL raises awareness of healthy meals
- Agreement on EU-wide platform worker legislation

#### Major sporting events

- 2024 sports events will bring people together

## Factors around delivery

- The future of deliveries: competition rises, cooperation grows
- AI transforms the customer journey

## Sustainability

- Food waste production in Germany
- Combating food waste with AI trackers and deals

## WHAT CONSUMERS WANT AND WHY

### Frequency of ordering takeaway/home delivery food

- Takeaway meal orders increase following the 2023 dip
- Takeaway meal ordering rises 5pp in 2024
- Capture affluent Germans with subscriptions and premium treats
- Germans turn to takeaways more often in 2024
  - Graph 4: frequency of ordering takeaway/home delivery food, 2021-24
- 16-34 year olds live to eat now, worry later
- 16-34 year olds are the most frequent takeaway orderers

### Ordering methods for takeaway/home delivery food

- Ordering directly from a restaurant/takeaway remains most popular among takeaway buyers
  - Graph 5: preferred ordering methods for takeaway/home delivery food, 2023-24
- More Germans collect their orders in 2024
- In-person collection can save money
- Full-time workers prefer delivery services and are interested in subscriptions...
- ...that can be accommodated by post-work treats

### Preferred takeaway/home delivery cuisine types

- Pizza remains Germans' favourite takeaway food
- Takeaway fried chicken gains popularity
  - Graph 6: preferred types of takeaway/home delivery food, 2023-24
- Germany's pizza obsession continues
- Takeaway is ordered as an indulgent treat

### Behaviours when ordering takeaway/home delivery food

- Germans like to order meals they don't want to cook
- Delivering discounted dishes through membership
- Provide drink deals to enhance takeaway experiences
- Scope for takeaway drinks

# Attitudes towards Foodservice Delivery & Takeaway – Germany – 2024

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- Desserts can soothe nerves during sport events

## Key factors when choosing takeaway/home delivery options

- Germans want variation and customisation on the menu
  - Graph 7: factors when choosing a restaurant/takeaway over another, 2024
- Customisation is king: adapt menus for versatility
- Leverage themed meal bundles for special occasions
- Approaching sustainable packaging solutions
  - Graph 8: consumers who try to act in a way that is not harmful to the environment, 2019-23

## Behaviour towards foodservice delivery and takeaway

- Germans want to save money, but are interested in innovation
  - Graph 9: behaviour towards food delivery and takeaway, 2024
- Cost of living alters takeaway behaviour
- Create shared activities with group bundles for professionals
- Add premium features to menus through portion sizes, ingredients and preparation methods
- Crafting the future of takeaway with AI and cooperations
  - Graph 10: behaviours towards food delivery and takeaway, 2024
- Ordering groceries and meals in one go
- Subscriptions attract cost-conscious consumers

## LAUNCH ACTIVITY AND INNOVATION

### Delivery operators

- Europe's delivery giants turned profitable in 2023
- Instagram launches food delivery sticker
- Just Eat (Lieferando) strengthens its cross-category partnerships
- Getir retreats from the Western market
- Wolt opens virtual supermarket and goes hybrid

### Foodservice concepts

- Concept Family trials mix-and-match concept cuisine Eat Tasty
- Click and Collect stations ease rush hours
- Pilot project on collaborative reusable packaging successful

### AI in foodservice

- Circus Kitchens changes concept to kitchen robotics
- Nextly offers analytical solutions for foodservice operators
- OCUS enhances menu visuals with AI
- Just Eat and Uber trial AI assistants

## Advertising and marketing activity

- Lieferando's global campaign enlists celebrity power...
- ...just like Uber Eats, which makes films come to life...
- ...while Wolt's localism contrasts with the 'star power' approach
- KFC promotes chicken to eat at home

## APPENDIX

### Appendix – products covered, abbreviations, consumer research methodology and language usage

- Products covered in this Report
- Definition of seatless foodservice concepts
- Abbreviations
- Consumer research methodology
- A note on language

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