

# HOW RESTAURANTS ARE ADAPTING TO UNSEEN CHALLENGES

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THE NEW PLAYBOOK

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**The report reveals the key forces shaping the market and shows how successful companies are adapting to stay ahead.**



**Carl Jacobs**  
Author



**Geert Merckaert**  
Editor



**Jens De Landtsheer**  
Designer

Special thanks to the experts quoted in this report for sharing their valuable insights, knowledge, and experiences.

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## The Road Ahead for Leaders in Food Service



The restaurant industry is evolving. There was no escaping it.

Wafer-thin margins and high staff turnover have been a problem for decades. Add inflation, employee shortages, and changing customer preferences to the mix, and you realise the old formulas for success have run their course.

The restaurant industry has been evolving for years. But unlike in the past, **the transition is picking up speed**, widening the gap between leaders and followers.

Changes are inevitable and not inherently risky. The risk emerges when the industry fails to adapt and evolve with these ongoing changes.

In short, innovation is essential. The big question is: what to tackle first?

We asked C-level executives in Germany, the Netherlands, Denmark, Sweden, Belgium,

Finland, and the UK about the challenges they are dealing with and how they address them.

After reading this report, you will better understand the pressures the European food service industry is under and how successful operators are responding to the challenges.

The index below will help you navigate the report.



**Carl Jacobs**  
CEO & Co-Founder at Apicbase





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# 1. Challenges: Drivers of Change



The restaurant industry has sailed into a perfect storm:

- Consumers have less money to spend;
- Customers have new preferences;
- Food costs, wages and real estate prices have increased considerably.
- Experienced staff has left the industry, looking for better jobs.

It puts enormous pressure on both operations and margins.

On the other hand, the understanding customers showed during the pandemic has faded. They expect restaurants to have overcome their challenges in terms of supply chains, staff and prices.

In the next section, we break down the issues into context, challenge and the resulting insights.

## Inflation

Inflation was another wake-up call. Restaurants are vulnerable. When things go wrong, they are the first to suffer.

### Context

Prices had been rising for a while, but the problem only became apparent when the war in Ukraine broke out, and energy prices went through the roof. The energy crisis seems under control for now.

It gives the food service industry a much-needed pause, but the problems are far from over.

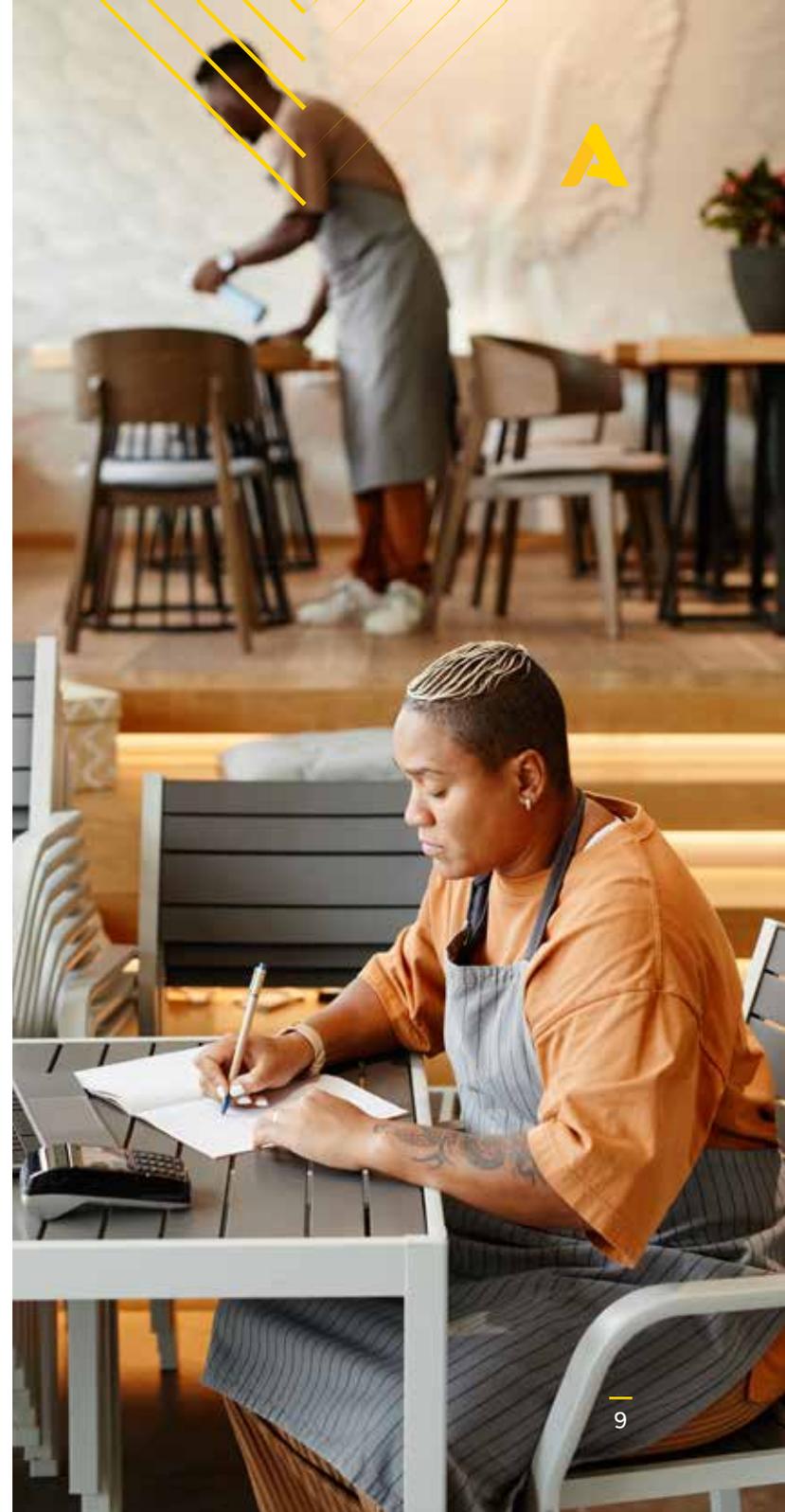
Something strange has happened.

10.2%

INFLATION 2022

2.9%

INFLATION 2024



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In 2022, the EU reached peak inflation of 10.2%—a painful episode.

Since then, however, inflation has been gradually decreasing. The International Monetary Fund (IMF) predicts inflation will hover around [an agreeable 2.9% in 2024](#)<sup>1</sup>.

This is where it gets weird. Despite general prices returning to normal, food prices are still historically high.



For reference, in September 2023, the price of [olive oil was 75% higher than in January 2021](#)<sup>2</sup>. Potatoes were 53% more expensive. Egg prices rose 37%, and butter prices went up 26%.

If you deal in food, that's a hard nut to crack.

## Challenge



MARGINS ↓



TICKET € ↓



COMPETITION ↑

Rising food prices represent a triple challenge for the restaurant industry, impacting profit margins, operational strategies, and customer pricing.

- Firstly, restaurant profit margins have shrunk. Visit frequency has remained more or less the same, and in most European countries, turnover has even increased, but this is mainly a result of price adjustments. Operators have [raised menu prices](#)<sup>3</sup> to cover losses. If done strategically, it brings some relief, but even then, most operators say it is almost impossible to adjust menu prices in line with actual costs. As a result, margins are down.
- Secondly, consumers affected by inflation have less disposable income and are more cautious about their spending, which affects ticket size.

- Third, competition is increasing. More and more companies target customers looking for quick, tasty, reasonably priced meals. Retail is also fully committed to that market. People are cooking less at home. The food service market is growing, but strong players are also emerging. And thanks to a well-organised supply chain and accompanying pricing strategy, they are forcing 'traditional' restaurant companies to prove their worth.

Tiny margins, consumers with less purchasing power, and fierce competition are three uppercuts in a row. These put enormous pressure on profitability in an environment where margins are thin, even on good days.

**How will the macroeconomic landscape evolve in the next 6/12/18 months? Navigating these volatile times is high on our agenda.**



**Mads Bentzen**  
CFO, OLIOLI

## Insight

Inflation was another wake-up call for leaders in the restaurant sector after the earlier blows from the pandemic, supply chain problems in the wake of the war in Ukraine and the subsequent energy crisis.

Despite all setbacks, the industry has shown unimaginable resilience. On the one hand, this has to do with the stubborn entrepreneurial spirit that the food service sector is known for. But on the other hand, the age-old truth that 'people will always eat' also plays an important role. There will always be demand.

While resilience is valuable, the need to repeatedly rely on it suggests internal issues.

While resilience is a valuable attribute, the need to rely on it repeatedly points to internal problems. Restaurants are inherently fragile businesses. What if another blow comes? How many times can you bounce back before you break?





Restaurant leaders are increasingly aware of their industry's fragility. As a result, keeping that **vulnerability** under control is high on their agendas.



Inflation is the next big blow in a row of big blows. Restaurant leaders recognise the vulnerability of their companies to external challenges and focus on strategies to mitigate them.

The most forward-thinking entrepreneurs have started looking at their businesses differently. Growth remains essential in the short term, but at the same time, they look beyond.

Stability is their aim.

They realise that if they do not want the company to shake on its foundations at the slightest

turbulence, they need to build a company today that has everything it needs to be a healthy business in the future, too.

That vision requires a strategy focusing on innovation, flexibility and sustainability - in every sense.

## Staff Shortages



**OF ALL COMPANIES WORRY ABOUT THE SHORTAGE OF SKILLED WORKERS.**

The second driver for innovation is staffing issues. [People are less likely to choose to work in the hospitality industry](#)<sup>4</sup>. This is problematic for an industry that relies heavily on staff. In Germany, for example, [almost 80% of all companies](#)<sup>5</sup> are worried about the shortage of skilled labour.

## Context

During the COVID-19 lockdowns, many hospitality workers were at home or let go.

For many, it was a welcome break. After years of hard work, they were at home with their family and friends. It gave hospitality workers time to think about their future. When the hospitality industry was allowed to open its doors again, many workers did not return.

Moreover, almost every other industry is crying out for talented workers. Finding a job in another sector with better conditions was relatively easy. As a result, many hospitality workers switched careers or pursued other dreams and aspirations.

## Challenge

When restaurants began to reopen gradually, they faced an unexpected double challenge: overwhelming customer demand and a reluctance among former staff to return. Of course, the law of supply and demand also played a role, pushing wages and dealing another blow to profitability.

## Insight

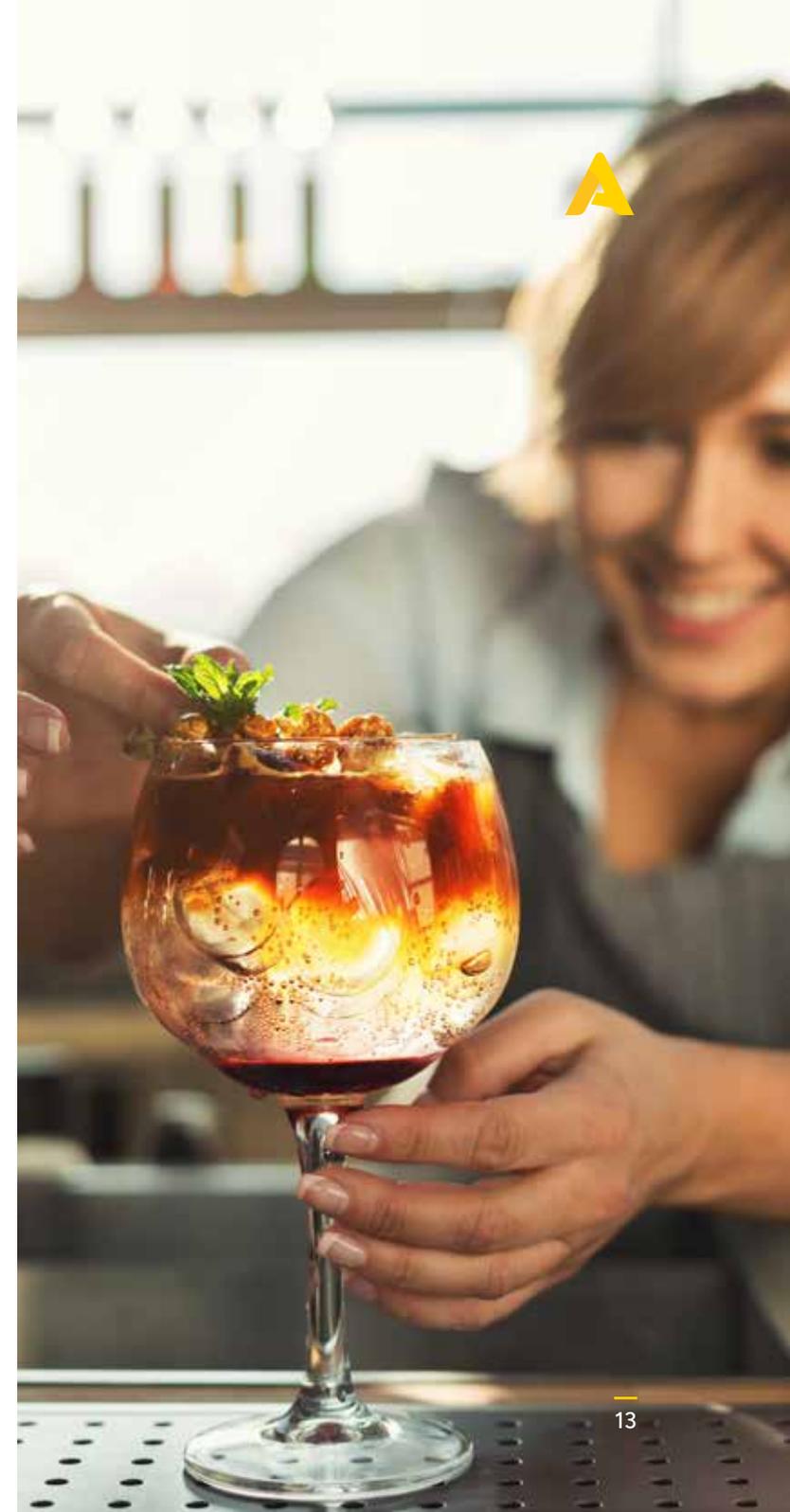
Without generalising too broadly, it's evident that the restaurant industry doesn't enjoy a strong reputation as an employer.

Understandably, people want jobs with a good work-life balance, decent pay and working conditions.

In contrast, the restaurant industry is notorious for its demanding hours, need for flexibility, and low wages. Uncertainty is the rule for hospitality workers. It is about their pay, which can fluctuate considerably depending on the number of hours they are rostered, but also about the survival of their position and the company they work for. Workers in the hospitality industry have repeatedly found that when the economy hits a low, they are the first victims.

Restaurant companies are trying to answer two critical questions:

1. How can we attract and retain talented employees?
2. How can we lessen our reliance on a large workforce?





## Consumer Behaviour

The most significant catalyst for change in the restaurant industry is evolving customer preferences.

While inflation and staff shortages certainly require immediate business and operational responses, the shift in what customers want and expect truly challenges the fundamental concept of a restaurant.

### Context

The good news is that despite macroeconomic challenges, consumers have always supported the hospitality industry.

**People are prepared to turn down the heating and wear a warm jumper indoors, but they don't want to skip on leisure.**



**Misa Järvinen**  
Head of Operations at Taco Bell

But lifestyles have changed. Even loyal customers are now making different choices compared to five years ago.

### Challenge

Big books have been written about changing consumer behaviour. However, when we talk to restaurant leaders in Europe and the UK, these are the trends they are working on.

### All Day, Every Day

It used to be simple. Friday, Saturday and Sunday are great days for business. Mondays and Tuesdays are slow. From Wednesday on, things start to pick up. The same goes for peak times during the day: they were predictable. That's over.

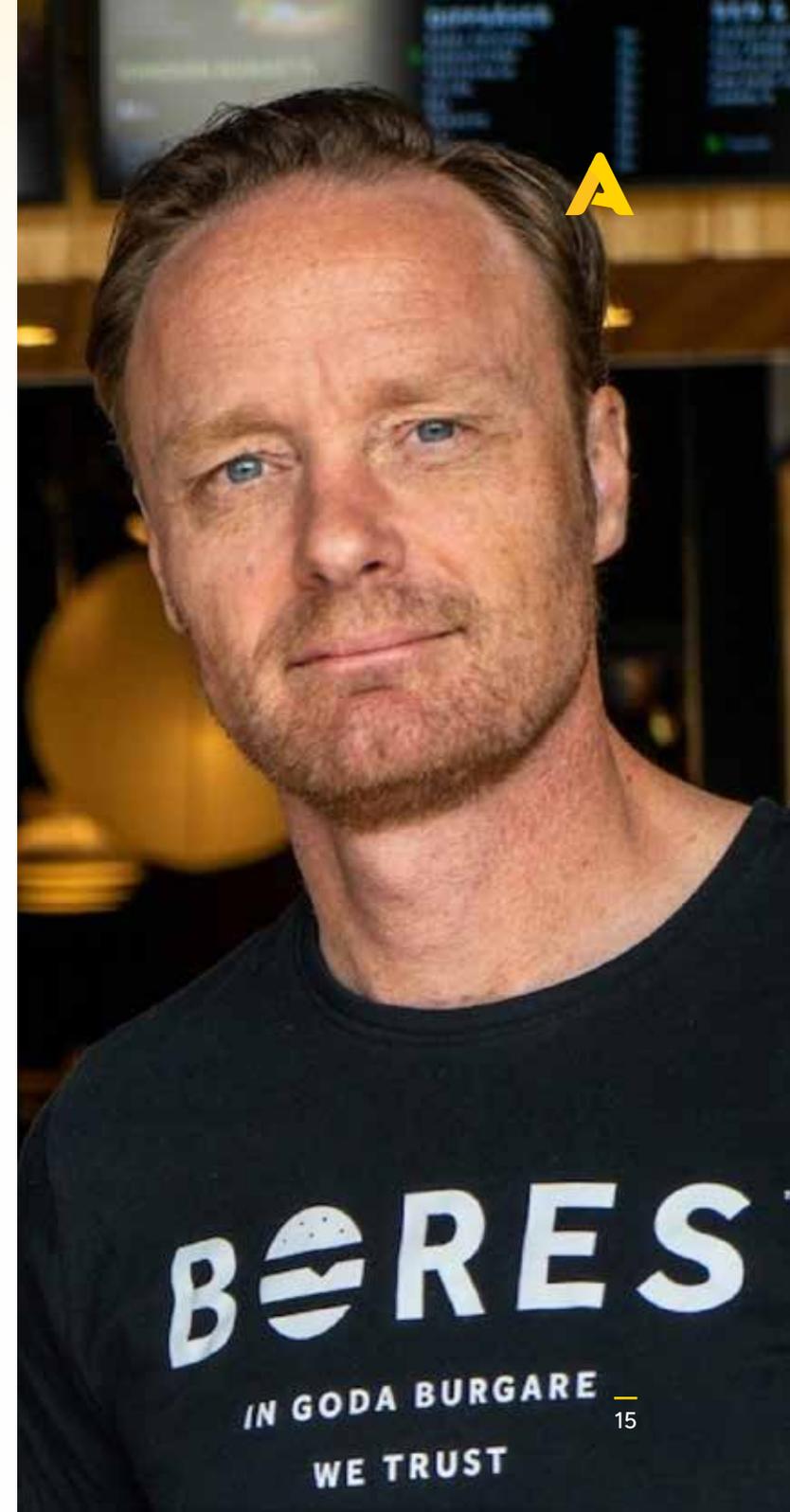
"Eating out has become a regular option for any meal and any day of the week. As a result, fast-food and fast-casual brands like pizza, burgers, sushi, and kebab are growing faster than bistro or fine-dining places," explains Henrik Mattsson, VP at Hospitio.



Consumer patterns have changed. It's much harder to predict when customers decide to eat at our restaurants. Out of nowhere, a random Tuesday can have high revenue, while the following Thursday is much below average. This makes staff scheduling and inventory management much more challenging.

**CARL-HENRIK FORSSBECK**

CEO and Co-founder of Böres and Ruths





Nation's Restaurant News confirms the trend. "The data points to [a blurring of day parts](#)<sup>6</sup> in a way not quite seen before. These changes may permanently affect restaurants' business models – labour scheduling, menu innovation, promotional activity, etc. It used to be breakfast, lunch and dinner. Now, we're seeing more segmentation."

Exemplary here is the growth of coffee places. "There is a trend of consumers going to a speciality coffee spot for lunch now, not just breakfast. There is a finite shift in how consumers are using coffee spots."

Retail plays into this growing demand for all-day functional food options. "Gas stations, 7-Elevens, kiosks, and so on- they have all improved their food offer immensely," Henrik Mattsson adds.

"**How fast can you be?**" is what customers want to know, says Misa Järvinen, head of operations manager at Taco Bell.

**It opens a new frontline for direct consumption.**

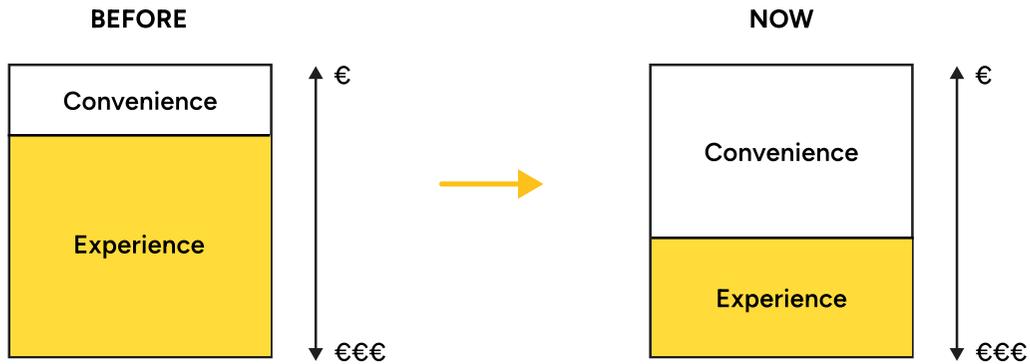
The battle between foodservice and retail focuses on direct consumption. It's not about the planned nights out with friends but about functional spending on food, such as lunch at work, at home, or on the road. That's where the big growth opportunities are.



**Gert Laurijssen**  
Founder at Foodservice Alliance

"Retail has traditionally had a strong convenience proposition. Foodservice took the lead when it came to experience. The more accessible food service becomes, the greater the [competition from retail](#)<sup>7</sup>," adds Gert Laurijssen.

The market is polarising between experience and convenience. It questions existing brand positions and forces concepts to evolve in one direction or the other.



Concepts striking a new balance between experience and convenience enter the market.

Casual dining, fast-casual, and bistro concepts are reconsidering their positions. In recent years, they were primarily concerned with survival and less with innovation. In that area, they have a lot of catching up to do. Meanwhile, retail brands are scanning the possibilities.

The market is refocusing and looking at the extremes. This also means there is **room in the middle** for concepts that strike a new balance between experience and convenience.

Systems-driven concepts increasingly occupy this space in the market. These unique, well-thought-out concepts operate like a traditional food service business at the front but a streamlined machine at the back. Like any other company, they look at quality, growth, and profitability but prioritise operational efficiency.

They know money comes in at the front, but **profit is made in the back-of-house**. In terms of pricing, these types of operations can play the whole spectrum, from cosy local eateries to big catering, depending on the concept.



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## Affordable luxury

People are willing to spend 7 euros on a premium coffee every day of the week. The price of the coffee doesn't match its actual value but reflects the perceived value.

These purchases are growing as people look for what Euromonitor describes as '[moments of goodness](#)'<sup>9</sup>.

Why are customers looking for moments of goodness? Two reasons:

1. Price rises made it more difficult for consumers to cover their expenses, forcing them to make sharp cutbacks, trade down or downsize.
2. The perpetual crisis the world seems to be in, and all the negative noise that comes with it, makes people long for a daily dose of happiness.

Customers seek pleasurable experiences. Sound good? Sure, because that's what the hospitality industry is good at. The problem is that market growth is different from what it used to be.

Big nights out with friends are less common. The rising cost of living challenges this lifestyle.

As a result, consumers are turning to more **affordable alternatives** with experiences of relatively equal quality. A good coffee with friends and a piece of cake can make your day, but expressed in euros, it hurts the wallet less than a three-course dinner with the same friends.

Moreover, coffee is easy and quick. These are important assets for today's convenience-driven generation.

**Burgers are like wine these days. A long time ago, it was a burger: yes or no. Now it's: do you mean plant based, triple smash or old style? The category matures and deepens.**



**Kaj Török**  
CSO, Max Burgers

As a result, categories that used to be considered low-cost or cheap, like coffee, are getting upgraded to a premium offering while remaining accessible. Burgers got a similar makeover years ago. The corner of the market where premium burgers reside has become saturated, but it illustrates well what customers are looking for.

The trend towards affordable luxury has led to **downsizing**. People are looking for smaller portions with a lower price tag so they can enjoy them more often.

**Portion downsizing is a trend that we are seeing globally, says Mads Bentzen, CFO at OLIOLI. It ties in with the lower disposable income for consumers caused by inflationary pressures and into the more general trend of awareness around consumption.**



**Mads Bentzen**  
CFO, OLIOLI

**Value for money.** It sounds simple, but it never is (like most things in food service. Customers pay more for food and drink

than they used to and expect something in return. The affordable luxury [millennials and GenZ are looking for](#)<sup>9</sup> ties in with the all-day, everyday food trend.

They go out to eat or drink more often but have less money to spend, so consumers want to get as much out of their budget as possible, balancing experience, quality, and convenience as best they can.

The keyword in this context is **perceived value**. The tricky thing is that the [concept of value](#)<sup>10</sup> is hard to pin down.

It's personal, covers many aspects, and evolves. Price is a factor, but it doesn't define the value of a product or service.

To be clear, understanding and delivering perceived value doesn't always mean being the cheapest option. Instead, it's about creating a unique value proposition that resonates with the target market. Whether through a unique culinary experience, exceptional service, a trendy atmosphere, or a combination of these elements, the goal is to provide something customers feel is worth paying for.





Operators must navigate these complexities and continuously **adapt** to meet their consumers' changing needs and expectations. This could mean updating menus, experimenting with new concepts, or adopting new business models like pop-ups or ghost kitchens.

Unless, a brand has a loved and very clear proposition i.e. a superfast service or high end dining experience, a wait-and-see approach is about the last thing food service operations should do in this time of transition and stiff competition. It risks leaving a restaurant behind as **competitors and the market evolve**.

This innovation isn't limited to just the menu but extends to all aspects of business, including service models, technology adoptions, marketing strategies and the overall customer experience.

The old business model doesn't quite fit the new reality any more. A robust backbone is crucial. It means having systems and processes that can quickly adapt to change.



The food service industry is in transition. In the past, restaurants could rely on a static model: They offered a set menu, and customers chose to dine based on the available offerings.

This model worked for a long time, but evolving customer preferences challenge its usefulness. Today's customers are informed, connected, and have specific expectations. It creates a more **dynamic market** in which concepts must be willing to innovate.

The transition to a dynamic environment involves all aspects of the operation:

- **Agile supply chain management:** To adjust menu items and ensure sustainable sourcing without hampering profitability.
- **Technology Integration:** Leveraging technology for efficient operations, from inventory management to customer relationship management.
- **Dynamic Staff Training:** Ensuring staff are adaptable and can provide high-quality service even as the business evolves.
- **Financial Flexibility:** Managing finances in a way that supports innovation and change, including potential shifts in revenue streams.
- **Customer Feedback Mechanisms:** Systems to rapidly gather and respond to customer feedback, facilitating continuous improvement.

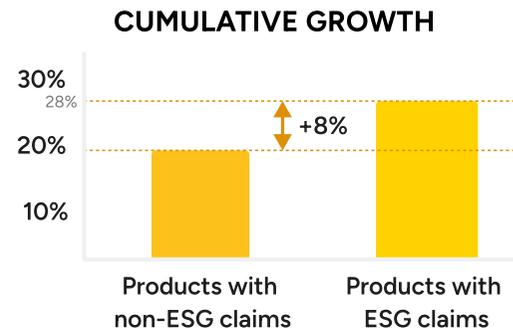
A dynamic model positions the company for future growth and sustainability in an increasingly competitive market.

## Purpose

Sustainability has been a prominent feature in trend reports for years, reflecting a broader transition towards a sustainable economy.

We expect a further acceleration of the shift towards sustainability in 2024. As the availability of sustainable options increases, customers will increasingly choose operators with a clear commitment to environmental, social, and governance (ESG) principles.

Why?



- There is a commercial reason. McKinsey research shows that products with claims related to ESG factors have





experienced [disproportionate growth](#)<sup>11</sup>, indicating that consumers are rewarding companies that are serious about sustainable practices. Products making ESG-related claims averaged 28% cumulative growth over the past five-year period, versus 20% for products that made no such claims.

- A company's survival depends on it. Without a clear promise around sustainability, that companies have no chance of doing business in the medium term, restaurant leaders confirm.

Not just in the eye of the consumer, board members, too, have little faith in companies that don't take ESG seriously.

Euromonitor has identified a **fundamental shift in consumer attitudes**: while individuals are aware of environmental concerns, they understand that tackling issues like climate change cannot be done in isolation. Consumers recognise the need for widespread action and increasingly [expect businesses to take the lead](#)<sup>12</sup> in driving societal changes.



Improving ESG standards was crucial not only for the future of the company, but also to attract experienced board members. Without it, they wouldn't even consider joining our board. That says a lot about its importance to our industry.

**SIMON WANLER**

Co-Founder & CEO of Bastard Burgers





- Regulatory changes are also accelerating the push towards a green economy. A prime example is the European Union's recent [ban on greenwashing](#)<sup>13</sup>. Generic environmental claims like 'eco', 'climate neutral', or 'natural' must be backed by concrete evidence to be permissible.
- Another accelerator towards a greener economy is the introduction of the [Corporate Sustainability Reporting Directive](#)<sup>14</sup>. These standards require large companies to report their impact on social and environmental issues, i.e. ESG impact (Environmental, Social & Governance). This transparency makes it easier for investors and customers to understand and evaluate a company's commitment to sustainability, aligning with the European Green Deal's objectives for a more sustainable economy.

People don't mind entrepreneurs making a profit. However, they are increasingly less tolerant of the hidden costs of business success to the environment, society or personal well-being.

It's more than just consumer preference—new regulations are coming into play, and the big players are expected to stick to their eco-friendly promises. This **raises the bar across the board**, and even smaller companies, which might not be legally bound to these new standards, are feeling the push to keep up.

It's like a **domino effect**; when the leading companies move toward sustainability, it sets off a chain reaction that influences the whole market. Businesses seeking longevity will need a **purpose that extends beyond making money** and aligns their operations with the broader values of society and the environment.



The march toward a green economy is gaining momentum, and 2024 is shaping to be a watershed year. The gap is widening between companies that have proactively embraced ESG practices and those that have delayed or bypassed the transition.

## Insight

For decades, the key to success has been a combination of a prime location and a high-quality offering at a fair price. Build it, and people will come.

This static environment is evolving into a dynamic one.

Now, **success depends on a business's ability to innovate** in areas like service, experience, sustainability, and adaptability to keep up with changing consumer preferences and market trends.



**Recommend read:** [How to Navigate the Changing Landscape of the European Restaurant Industry](#) <sup>15</sup>



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## 2. Solutions: How Restaurant Leaders are Responding



## Profitability over Growth

Perspectives have changed significantly in the past year. While the prevailing sentiment among investors was 'growth at all costs,' profitable growth is today's north star.

At the end of 2022, investors were optimistic about the food service industry's future. They were willing to support businesses with low profitability and tolerate short-term losses because they saw long-term potential.

The economic downturn has made **investors more cautious**. There's now a focus on sustainable growth and a clear path to profitability.

"It's about how the capital market values things", says Mads Bentzen. "A growth path often requires external capital, and capital holders are pricing things differently than

they were just two years ago. While big growth could lead to big valuations two years ago, asset managers increasingly look at earnings to justify high valuations. So our focus has shifted to include profits more so than it was two years ago."

Simon Wanler, CEO of Bastard Burgers, agrees: "2023 was a tough year. Expansion had always been front and centre for us, but we pivoted from that mindset almost instantly to one of profitability. Overnight, the question became how do we keep our margins."

However, in challenging economic times, prioritising profitability is essential for ensuring business stability and resilience. This strategy instils confidence in investors, optimises resource allocation, and improves the company's adaptability to market changes.



A strategy focused on revenue growth used to be sensible, especially considering the industry's **transformation from a traditional, static state to a dynamic, fast-evolving one**.





**OLIOLI**  
POKE BAR



**The capital markets have increasingly shifted their focus from CAGR to EBITDA margins. The question is: how do we position ourselves to that shift to successfully maintain the growth that we want.**

**MADS BENTZEN**  
CFO at OLIOLI

## Operational Excellence

When the tide is high, nobody worries about the debris blocking the river's flow.

Only when the water level starts to subside does the old fridge stuck in the mud become a problem.

This metaphor helps to explain why operational **efficiency** has quickly risen to the top of the priority list for restaurant leaders in the EU.

**Optimising workflows is a constant priority for us. It allows us to run a lean operation in resource usage and FTEs.**



**Bart Buyse**  
CEO of IzyCoffee

Below, we listed the tactics restaurant leaders are deploying in 2024 to increase operational efficiency.

- **Building resilience**

Operational excellence is a comprehensive concept that includes all facets of effective business management.

In an interview with [Restaurant Dive](#)<sup>16</sup>, Caribou Coffee CEO John Butcher said, regarding finding optimisations: “What keeps me up at night is twofold. One is looking for all the cracks that can break when scaling a brand. We opened up 84 new locations last year, and we’re knocking on the door of triple-digit [new openings] this year. Everything has been designed in the systems and processes so that in 30 years, it still works well. We’ve been working hard to identify [problems] so we can get ahead of [them] for our franchise partners”.

Don’t confuse 'excellence' with 'perfection'.

Perfection would mean there’s an ideal or an end goal to be pursued. Operational excellence is quite the opposite. It is a process, a **mindset for continuous improvement**. Restaurant leaders are putting it front and centre.





Why?

Because regardless of macroeconomic factors or internal changes, it allows companies to address challenges as they arise.

Therefore, Operational excellence is not about achieving perfection but [building resilience](#)<sup>17</sup>.



- **Operational control**

If the past few years have made one thing blatantly clear, it's that restaurateurs aiming for profitable growth have to be able to make quick, data-driven decisions.

Efficiency improvements demand a detailed examination of a restaurant business. There are no shortcuts. However, it helps to see [how high-performing restaurant leaders optimise operations](#)<sup>18</sup>.

Regardless of the chosen approach, successful restaurant leaders always begin from the same point: a **thorough understanding of their business's operations**. They want to understand what is going on.

The significance of measuring performance in this context cannot be overstated. It's what sets industry leaders apart from rest.

Without operational data, the restaurant management doesn't know the specifics of how the business is doing. What they are missing is control. The data helps to identify strengths and areas for improvement.

Having operational **data guides the efforts** in the right direction and puts management firmly in the driver's seat when navigating challenges.

The gap between entrepreneurs who closely monitor metrics and [restaurant KPIs](#)<sup>19</sup> and those who rely primarily on gut feeling will widen even further.

However, the need for better insights presents a new challenge.

### The restaurant business isn't just about food. It's also about tech and data.



**Heidi Stirrkinen**  
CEO Kotipizza

Tracking dozens, if not hundreds, of [restaurant metrics](#)<sup>20</sup> and KPIs in spreadsheets is error-prone and labour-intensive.

Therefore, the pursuit of operational efficiency is closely related to digital transformation, a topic we'll discuss further in the report.

- **Standardised practices: systems, processes and CPUs**

Systemisation, or implementing highly standardised practices, is a powerful trend.

It's not a new phenomenon, but while process optimisation used to be an afterthought for traditional restaurant operators, we are now witnessing a shift. New entrants in the market are arriving with fully optimised concepts, ready to scale up. It signals a new generation of entrepreneurs in Europe.

Running multiple locations and utilising omnichannel sales strategies have become standard practices, not exceptions.

Scaling necessitates streamlined operations and effective control, akin to the processes seen in large global QSR (Quick Service Restaurant) operations.

- If replicable processes aren't in place, quality and service are constantly at risk, harming the brand.



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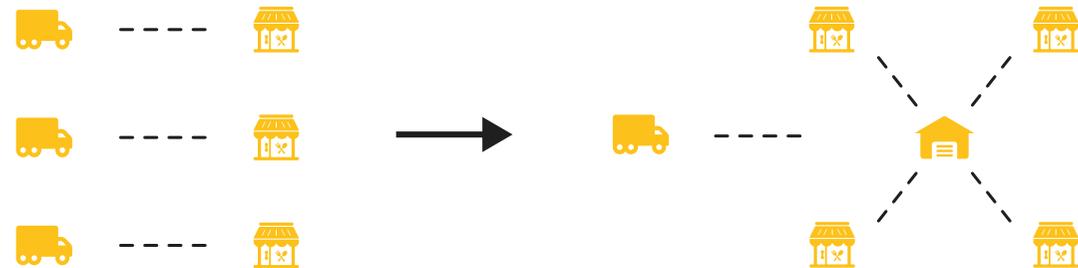
- Operators want to limit the chaos, ensuring available staff can work as efficiently as possible.
- Systematic procedures create control. Documented workflows with assigned KPIs allow effective performance monitoring and process optimisation.

In line with this evolution, we expect multi-unit restaurants to build [a network of central kitchens](#)<sup>21</sup>, such as Brammibal Donuts.

**CPUs (Central Production Units)** streamline back-of-house operations, increase product

consistency, and give restaurant managers more time to focus on the guest experience. These are essential assets for food production in an increasingly competitive European market.

In MCA Insight, Gini Newton of Karma Kitchens confirms: “Central Production Units (CPUs) are becoming [increasingly important for multi-site restaurants](#)<sup>22</sup> and food production. The spoke-hub model helps centralise costs, reduce food waste and achieve consistency in products across multiple locations.”



*Centralised costs, efficient production & consistent quality.*



About the CPU, the economies of scale and simplified logistics are most important to us. With our centralised kitchen, we can order ingredients in larger quantities at better prices and have them all delivered to one location.

**JEREMY DEANE**

Operations Manager at Brammibal Donuts





## Digitalisation

If we had to pinpoint one central theme for the prospects of the European hospitality industry in 2024, it would be 'digitalisation'.

**The trend towards digitalisation is strong. Inflation and rising labour costs have opened doors to solutions that reduce labour.**



**Pär Svensson**  
Strategic New Sales Manager

Simultaneously, app and online orders are growing quickly. "Our meta-data [for Sweden] shows that the number of worked hours is decreasing while sales are still rising. More specifically, sales per worked hour for all Swedish Caspeco customers are up by 7% compared to 2022", adds Pär.

Simon Wanler, CEO at Bastard Burgers: "For our segment, fast-casual, digitalisation is [trend] one, two and three. It has been for a while, and got boosted through COVID.

It's an extremely mature market right now.

Our consumer research has shown us that the majority of our guests want to order through digital channels. They want to order through self-service kiosks [...]. It's the most important right now. People consume in different patterns. It's not sit-down dinners or classic lunches. You eat quickly; you eat at different times; you eat alone.

Digitalisation is key to meet this need for convenience. You'll have a tough time if you miss out on that."

Henrik Mattsson, former vice VP of Brödernas and current VP of Hospitio, takes an even firmer stance: "Tech is replacing



**Recommended read:** Why [restaurant tech leaders](#)<sup>23</sup> love Apicbase's secure, scalable back-of-house solution that integrates with their restaurant's tech ecosystem.

middle management and overhead cost”.

“From the start, OLIOLI focussed on creating a robust digital infrastructure. It’s the foundation for the pace of growth we want”, adds Mats Bentzen, CFO at OLIOLI.

In short, digitalisation is transforming restaurant operations to their core, starting with the strategy.

- **New Digital Strategy**

For a long time, digital transformation was seen as a peripheral part of a restaurant's overall strategy.

It was viewed as an operational investment to address specific problems, such as online orders, reservations or loyalty programs. That has changed.

Restaurant leaders have realised that digital transformation isn't a side project; it's at the core of how restaurants do business in the modern world. That also means food service companies are questioning their pre-existing strategies.

In the aftermath of the pandemic, there was a rush of investment in technology. Restaurant executives were swept up in a frenzy to "keep up". Today, they are taking a step back. The question is no longer how to add technology to our operations but **how to organise our operations around technology**. The new 'digital' mindset even challenges the traditional business structure and division of responsibilities.

Simon Wanler, CEO of Bastard Burgers, says, “Digitalisation is vital for our company's future. We wanted to do it properly, so we

hired an experienced CIO to take charge of the transformation. It is our main focus today.”

New technology isn't the change. **The real change is the new way of working** and thinking in food service organisations.

Developing long-term digital strategies is critical, says Carl Jacobs. “It's about understanding the customer and regaining control over the restaurant supply chain.





This knowledge is essential to future-proof a restaurant business and anticipate trends, cost deviations, and major social disruptions. In other words, this knowledge ensures resilience within the company.”



**Recommended read:** Digital on the Surface, Dated at the Core: [Why Your Restaurant's Digital Transformation Is Missing the Mark](#)<sup>24</sup>



**Instead of forcing new technology on traditional processes, we are rethinking our internal workflows to align with technology. Not the other way around.**

**PETER SCHIMPL**

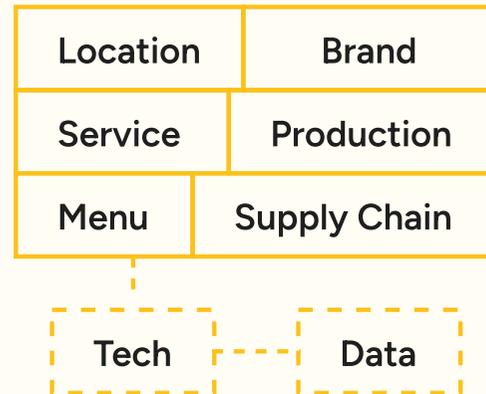
Vice President Digital & IT, L'Osteria



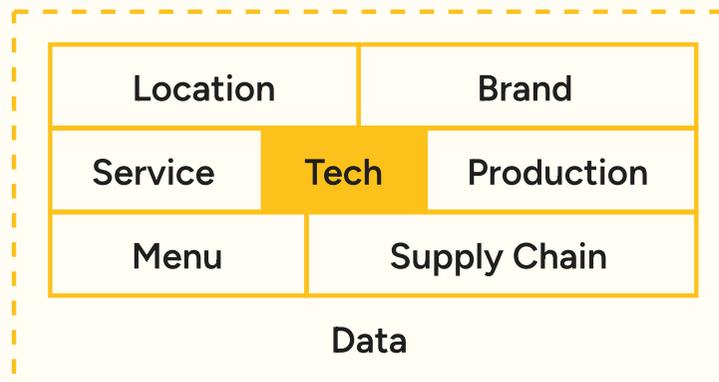


## STRATEGIC REORGANISATIONS FOR BETTER TECH INTEGRATIONS

OLD



NEW





# The Food Service Growth Show

Subscribe to our podcast. Carl Jacobs, the CEO of Apibase, sits down with restaurant leaders and experts to chat about what it takes to grow a successful, scalable and profitable business.

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- Integrations and interoperability

Data overwhelm poses a risk.

Most major restaurant companies have had so many small and large tech implementations that huge data silos have emerged. Finding relevant information isn't the issue any more; it's making sense of all the available data.

The growing need for data unification and system consolidation is holding tech adoption back and, therefore, efficiencies that it can bring. It also impinges on optimising the guest experience.



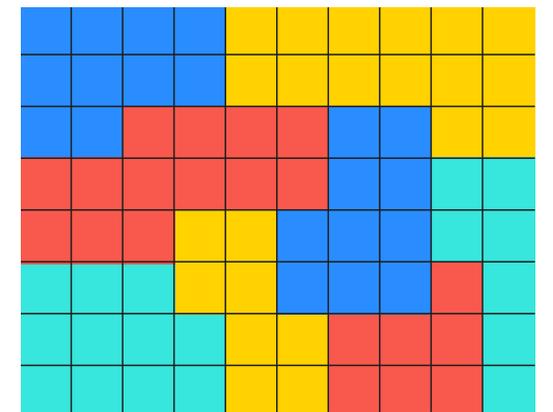
**Carl Orsbourn**  
Author and COO at Juicer

The avalanche of [data is complicating decision-making](#)<sup>25</sup>, forcing restaurants to think beyond day-to-day problem-solving and address critical questions like 'What insights do we need?';

## SILOED DATA



## INTEGRATED DATA



*Integrated tech enables true data-driven decision-making.*

'Which solutions can deliver the data?' and 'Do these technologies communicate with each other?'

**At this point, I believe many restaurants have a solid tech stack, so it's key to integrate and automate the systems. The more data the systems produce and the more you're able to make (meaningful) use of it, the more likely the decisions you're making will be good.**



**Robert James Geller**  
Head of Digital, Peter Pane

It is crucial for restaurants to collect 360° customer data and engage with them across all channels while managing the supply chain end-to-end.

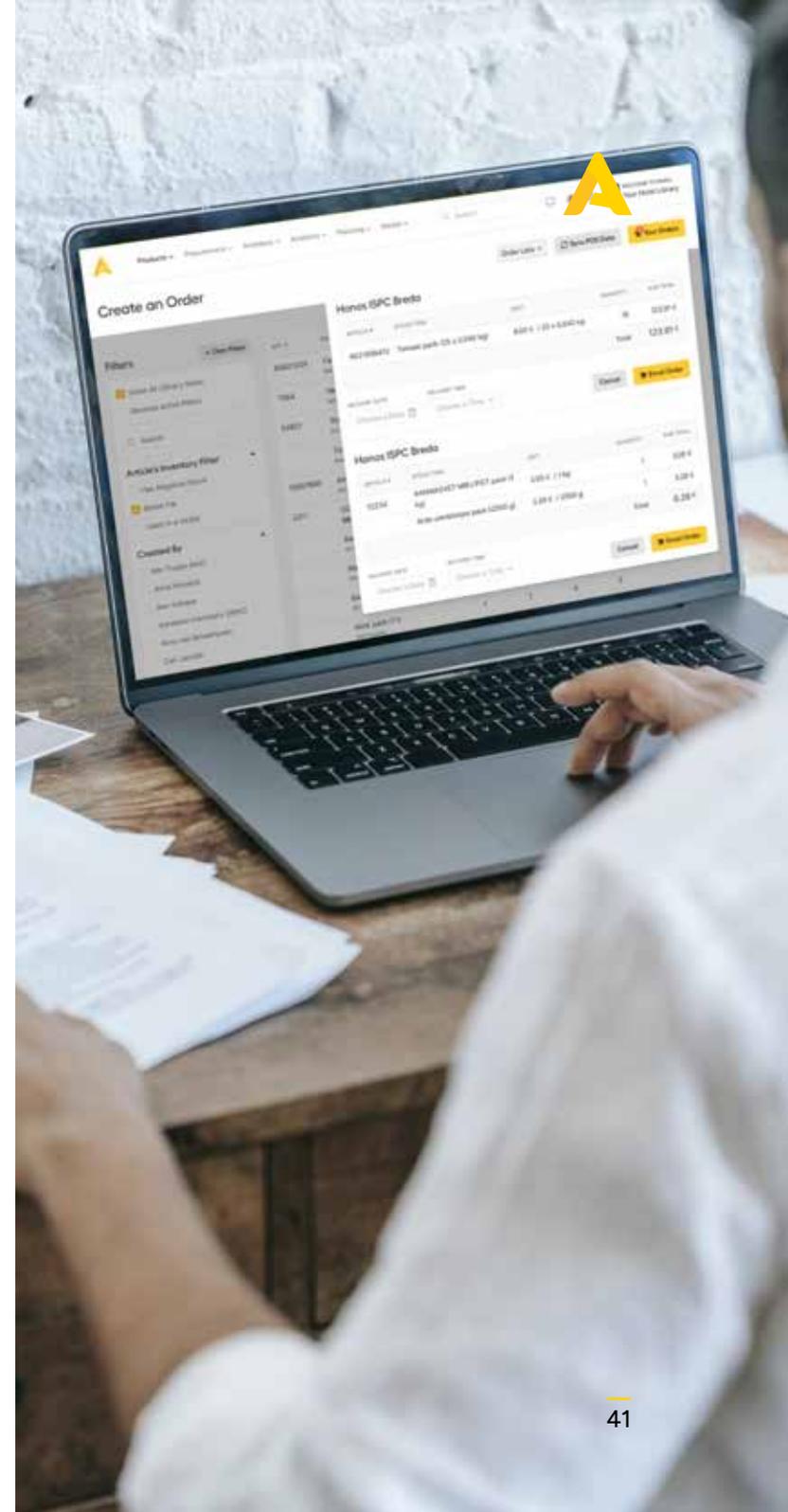


**Recommended read:** Apicbase is [SOC II, Type 2 Compliant](#)<sup>27</sup>: Apicbase software meets the highest standards of data security, privacy, reliability, and operational excellence.

To succeed in this environment, tech companies must offer [open APIs](#)<sup>26</sup> and real-time insights, focusing on data transferability. It means that even on the technology side, a divide is growing between companies that can provide robust API endpoints, enabling true interoperability, and those that cannot.

Legacy closed-system technologies will hold back modern restaurants.

It presents CIOs, CTOs, and other restaurant industry executives with the additional challenge of separating the wheat from the chaff among the many restaurant software vendors.





**Restaurant executives must ensure that today's technology investments aren't tomorrow's dead ends.**

**CARL JACOBS**

**Co-founder and CEO at Apicbase**

- **Tech-savvy Employees**

Labour shortages are one thing. The question is: are restaurants still looking for the right employees?

The digitalisation of the restaurant industry necessitates a workforce with a different skill set than before. First and foremost, these are developers and IT and data analysts.

**There is a big shift, especially in larger foodservice companies, towards data-driven decision-making rather than operating on gut feeling.**



**Ellen Snel**, Data analyst  
Restaurant Company Europe

But there's also a broader need for tech-savvy staff, employees who feel comfortable [using technology in their daily \(work\) lives](#) <sup>28</sup>.

It's about employees, especially those in management roles, who view technology as more than just a tool; they see it as a

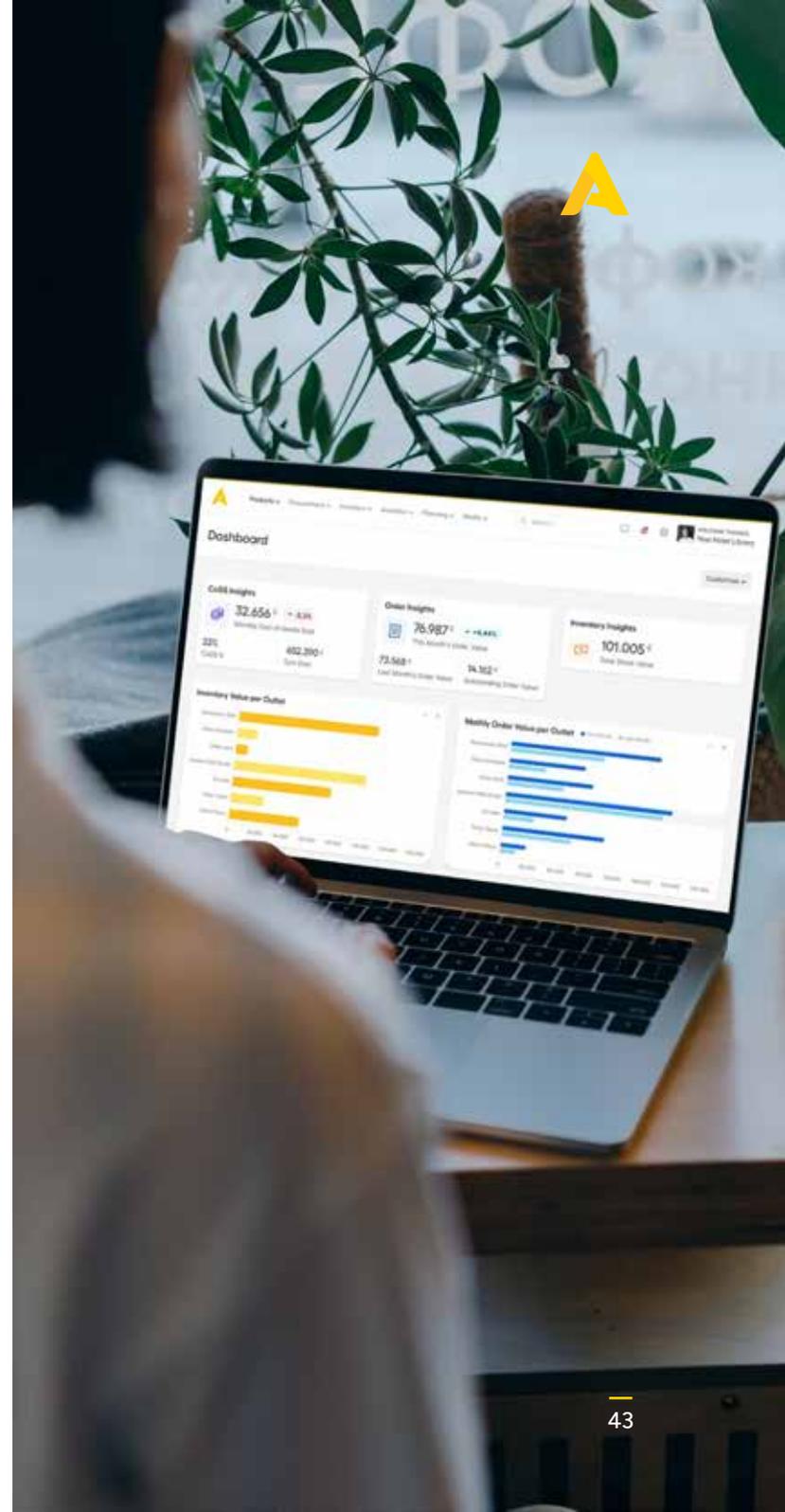
fundamental component of operations and decision-making. While this perspective may seem obvious to some, many others can relate to the opposite mindset: **'But we've always done it this way'**.

It's tempting to view digitalisation solely as a tech-driven process - finding the right tools, software, and systems to streamline operations. While that's a part of it, there's more to the story. Digitalisation goes hand in hand with [transforming a company's culture](#) <sup>29</sup>.

Here, a new divide is quietly emerging in the food service industry.

Forward-thinking companies are proactively incorporating cultural change into their digital strategies.

These companies understand that employees need to see technology as more than just a tool; it should be an integral part of their daily operations and decision-making.





Achieving this mindset shift involves dedicated efforts in:

- training,
- communication, and
- a clear vision of how technology and culture should evolve together.

On the flip side, other companies take a more ad hoc approach. They might embrace digital tools and technologies without a structured cultural transformation plan. In these cases, the expectation may be that employees will naturally adapt to new digital tools.

This approach can sometimes lead to resistance and challenges. Employees might find it disruptive to their established routines and processes, leading to slower adoption and potentially missed opportunities.

As the industry continues to evolve, it's worth keeping an eye on this distinction. Companies investing in technology and culture will likely be better positioned to succeed in the digital era.



**Recommended read:** How To [Ensure Rapid Adoption and Maximum ROI of New Tech](#)<sup>30</sup> at Multi-site Restaurants.

- **AI**

After what we've seen in 2023 with ChatGPT and other emerging AI technologies, it would be wrong not to talk about artificial intelligence in this report.

We'll keep it short, though. Much has already been said about AI, and more will be said in the following months.

However, there is one thing we need to highlight about the rise of AI: the way restaurants operate, do business and interact with customers will change dramatically, and that **change is accelerating**.

The key question is: is the industry ready?

AI is advancing by leaps and bounds in automation and data-driven decision-making, helping restaurants stay competitive while increasing the pressure on a sector that is already struggling to keep up.

It will become increasingly crucial for middle management to manage the tools that manage operations.

We expect significant breakthroughs in the area of analytics and forecasting. **Apicbase**, for example, will be rolling out advanced features throughout the platform in the following months.

### AI supersedes our knowledge management overnight.



**Mike Rawson**  
CIO of citizenM

AI works with data, so effective use of that new technology requires relevant, well-structured data in the first place. Companies with a robust digital infrastructure are likely to increase their lead.

When the application of AI in the restaurant sector takes off, these companies will be able to attract customers more efficiently and engage with them while maintaining tight control over the supply chain.





## Talent Retention

The current fuss about staff shortages is strange.

Why? Staff turnover has been a problem for a long time, and the causes are well known: low wages, high workload, limited fringe benefits and job insecurity.

Additionally, staff turnover significantly impacts profitability. That is why it is so strange that the problem has not been addressed earlier.

A few years ago, the Dutch bank ABN-AMRO conducted a study revealing that [staff turnover costs restaurants approximately 7% of their annual revenue](#)<sup>31</sup>. To put this in perspective, consider a restaurant with a yearly turnover of €10,000,000 – a substantial €700,000 of that sum is allocated toward replacing and training new staff. It's a staggering figure. Imagine the impact if that money had been invested towards innovation.

Moreover, ABN AMRO said this was only

a conservative estimate. Their research took full-time jobs (FTEs) into account. The hospitality industry heavily relies on part-time employees, who, although they earn less, still impact the same cost categories: recruitment, onboarding, productivity loss, and exit costs.

Not to mention that part-time workers typically require more time to attain full proficiency, and regrettably, they often depart before reaching that level.

Added to this, often forgotten, is that staff turnover doesn't just affect the financial bottom line; it also places added pressure on remaining loyal employees, potentially dampening their motivation.

**Sustainability isn't just about food. It's also about how you treat staff.**



**Heidi Strikkinen**  
CEO Kotipizza

In short, the ramifications of staff turnover in a restaurant company are considerably more significant than assumed.



## THE COSTS OF STAFF TURNOVER

### Recruitment

- Advertising costs
- Select applicants
- Reference check
- Selection test
- Interviews
- Travel expenses
- Administration
- Work clothes
- And more for higher or scarce positions

### Onboarding

- Orientation
- Formal Training
- Informal or 'On The Job Training'
- Mastery (=efficiency in systems and ad hoc thinking)

### Productivity Loss

- Skills development & productivity
- Time investment of colleagues
- Supervisor time
- Lost turnover of employee
- Lost turnover & disruptions to colleagues and/-or supervisors

### Exit Costs

- Exit interview
- Administrative tasks
- Payments

Source: Verloop personeel kost horeca jaarlijks 1,4 miljard, ABN AMRO



So why was the staffing problem not addressed sooner?

There are several reasons, and they reinforce each other.

Most restaurants operate according to **traditional business models**. These models have worked fine for years, making businesses reluctant to change them. However, sticking to the status quo hinders innovation and adaptability decreases, which is problematic in a rapidly changing world.

Sticking to the status quo kills innovation.

Also, solving the staffing problem requires investments that do not immediately impact profits or sales. As a result, they do not get the attention they deserve.

Focusing on the short term puts essential investments on the back burner. The longer companies wait to innovate, the greater the **pain of change** becomes, pushing investments and changes further.

We are talking about investments in:

- technology and automation to ease workloads, and
- education and training to hone talent and prepare individuals for other roles and challenges within the company.
- And, of course, a compensation package allowing employees to build a future for themselves and their families.

In 2023, a significant transformation occurred.

It wasn't because everyone suddenly revamped their hiring and staff management strategies. Instead, it happened because the companies that had been working hard for years to create a **company culture** that people genuinely love found themselves navigating staffing challenges with relative ease.

It sets forward-thinking companies as an example for numerous other restaurants. As a result, we anticipate substantial transformations in the restaurant sector in the years ahead, influenced by the practices and approaches of these companies.



**Our business idea was simple: hire talented people and give them an opportunity to grow with the company. We invest in them, so they can develop their skills and have a career within the company.**



**Brazer Bozlak**  
CEO Urban Italian Group

It sets forward-thinking companies as an example for numerous other restaurants. As a result, we anticipate substantial transformations in the restaurant sector in the years ahead, influenced by the practices and approaches of these companies.

On a side note, it's worth highlighting that many companies in the industry have grown somewhat organically. Despite their outward appearance as large enterprises, they often continue to operate much like small businesses, with a heavy reliance on the owner, even for day-to-day operations.

Despite their outward appearance as large enterprises, many companies often continue to operate much like small businesses.

If these companies want to offer meaningful career paths to their employees, they need to rethink their business models and assess the optimal size of their operations. development within the company.

While working on a large scale offers clear HR benefits, it's not the sole factor distinguishing leaders from followers.

In practice, this means that instead of a rudimentary work-for-pay transaction, these successful restaurant leaders establish official and ongoing feedback loops with their employees.

They want to understand their employees' needs and motivations. These interactions guide the creation of career paths. Training and development programmes can then be created in line with the company's goals.

This approach allows raw talent to be discovered and developed. Moreover, these organisations form a reputation as an attractive employer to other employees.

So even when people eventually leave the company, they are prepared, and new





candidates are ready inside and outside the company.

"We put much effort into making OLIOLI a great place to work. For our newest store, we had 5 vacancies. 200 people showed up", says Mads Bentzen, CFO at OLIOLI.



To address the issue of retaining talent, it's essential to take a long-term perspective, not just a short one. It's about building a company that thrives over many years. This involves nurturing a culture that appreciates its employees, actively supports their growth, and provides clear opportunities for advancement within or outside the organisation.

## Off-premise Dining: The Second Act

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Off-premise dining, delivery-only restaurants, and dark kitchens were [once hailed as the saviours](#) <sup>32</sup> of the restaurant industry. They provided a much-needed boost for traditional businesses, but the reality didn't quite match the hype.

The key issues were the high fees charged by delivery platforms and the restaurants' lack of access to customer data.

The hefty platform charges hit everyone hard—customers faced inflated prices, while restaurants struggled under the weight of the extra costs. Also, being cut off from customer data reduced restaurants to cogs in the delivery platforms' machine, stripping them of any direct relationship with their customers.

Although the growth of delivery and associated innovations brought in additional revenue for restaurants, profit margins were slim.

But this isn't a eulogy for off-premise dining.

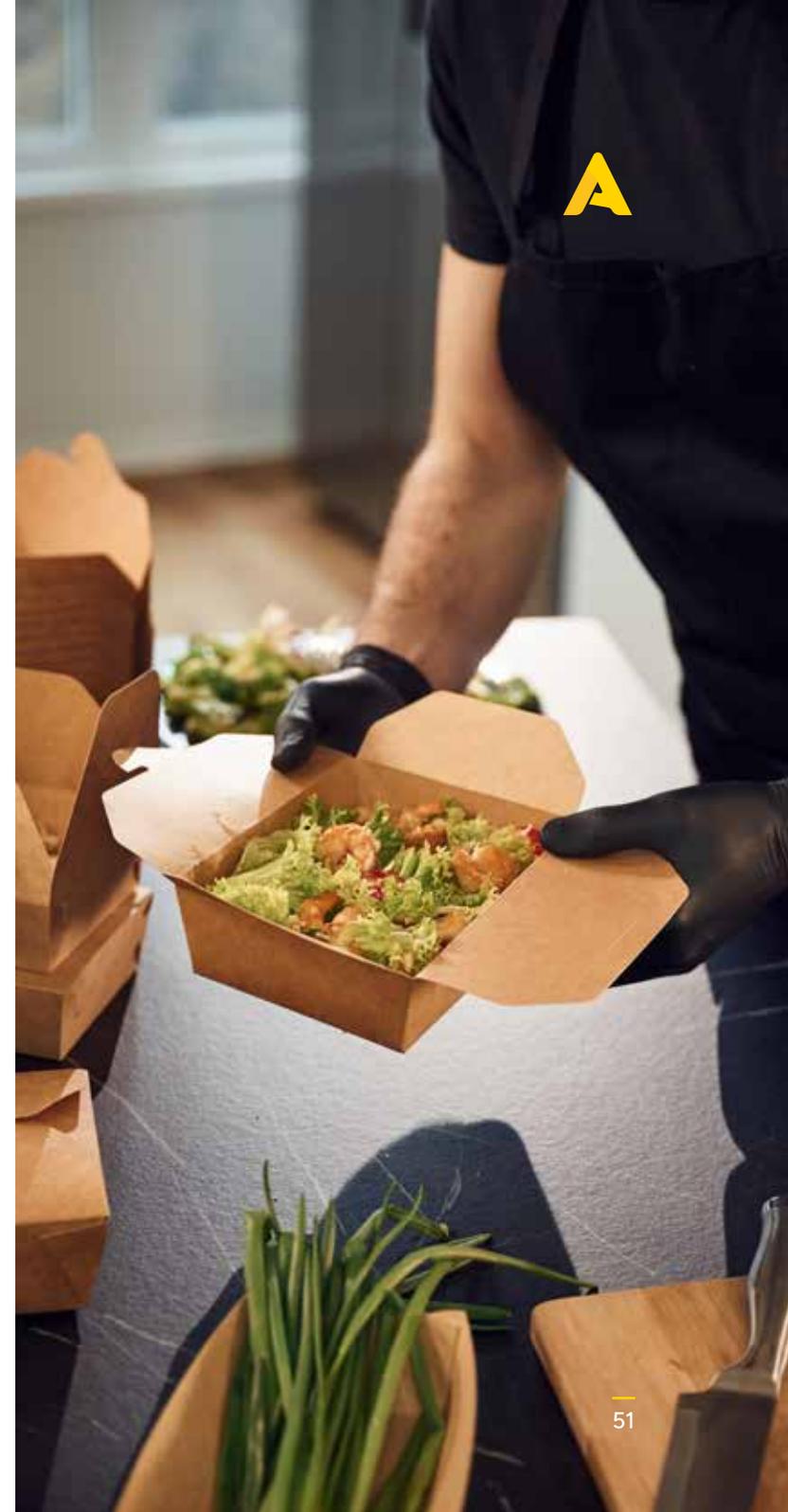
9.46%

### ANNUAL GROWTH RATE FOOD DELIVERY MARKET

On the contrary, there is a market for it. According to Statista, Europe's [online food delivery market is estimated to reach US\\$143.10 billion in 2024](#) <sup>33</sup>, with an annual growth rate (CAGR 2024-2028) of **9.46%**.

That's a lot of business.

But the old way of doing things no longer serves its purpose. What we are seeing now is the start of the second act in off-premise dining.





**We are seeing an increased customer demand and adoption of first-party delivery. At Deliverect, we believe this trend is a natural evolution of the food service delivery industry. We think it will bring significant benefits to restaurants and, more importantly, to their consumers, as they will have more and more options to engage with the brands they love.**

**ZHONG XU**

CEO at Deliverect

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## 5 ways operators adjusted their approach to off-premise dining

### 1. Shift to first-party delivery:

Restaurants are taking control of the delivery process. "Working through owned channels makes a lot of sense, both from a [cost-efficiency](#) and a [customer loyalty](#)<sup>34</sup> perspective, said Heidi Stirkkinen, CEO of Kotipizza on The Food Service Growth Show.

"It's about owning the value chain and controlling the customer experience."

### 2. Multi-channel dark kitchens:

Like restaurants, dark kitchens (aka ghost kitchens) are increasingly adopting an [omnichannel sales and fulfilment approach](#)<sup>35</sup>, including kiosk orders and pickup.

This might seem obvious, considering the whole industry is moving in that direction, but it's important to highlight the shift.

What used to be 'hidden' kitchens, unknown to the customer, are becoming highly efficient production and service hubs with distinct identities catering to consumers seeking convenience.



Operators no longer shy away from interactions with their customers and the community.

### 3. Virtual enterprise franchises:

Even to industry vets, virtual brands, aka virtual restaurants, aka delivery-only brands, are often elusive concepts. These restaurants have no physical presence and exist only on delivery platforms such as UberEats, Doordash or Takeaway.

Production can happen in any professional kitchen and is often licenced to independent restaurants, chains or dark kitchens.

Sound complicated? It is.

In theory, it should work really well. Still, in reality,

it's hard to get things organised, ensure that all parties make a profit, that the customer doesn't overpay, that there's consistency of quality, and, most importantly, ensure that customers come back for more.

Also, the surge of low-quality (hype) brands flooding the platforms didn't do the industry any favours.

Nonetheless, we expect this section of the industry to continue to evolve. It hasn't reached maturity yet, and has the potential to become a trusted optimisation strategy for underused capacity.

The main shift we see is established brick-and-mortar restaurant brands (i.e. well-established and popular brands) developing their own



delivery-only brands, with in-house production, when the parent brand doesn't align with the online market or when targetting a new audience.

As Stephan Leuschner said in The Food Service Growth Show episode on [the future of delivery in Europe](#)<sup>36</sup>, "Every restaurant will have its own virtual brands. The facilities are there, so why not use them?" This approach guarantees brand authority, wider reach, consistent quality, and cost optimisation.

We also anticipate that virtual brand licences will transform into solid franchise agreements. They'll [move beyond small, independent businesses](#)<sup>37</sup> into robust partnerships with well-established, large-scale food service organisations. The reason for this is control.

It's much simpler to make arrangements with a few highly organised companies that operate multiple locations than vice versa.

#### 4. Shift towards pick-up:

Pre-orders and pick-up will continue to rise. The reasons are many. An online order is efficient, customers save on delivery fees, and the food is prepared seconds before pick-up. This is especially true in cities, where picking up a meal on your way is no bother.

Research suggests the same. In a Pymnts survey (US audience), respondents were asked how they acquired their most recent restaurant meal. Pickup won over delivery by a landslide. For GenZ, for example, it was [44,7% vs. 13,6%](#)<sup>38</sup>.

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Mads Bentzen, OLIOLI's CFO, confirms: "Takeout is the biggest driver for us at the moment. 85% of sales come from it. Consequently, most stores can be relatively small, allowing for lower rents."

## 5. Delivery platforms have become acquisition platforms:

Does all of the above signal the death of delivery platforms? No. Delivery platforms have proven to be effective tools that people enjoy using.

On the other hand, restaurant operators will try to reduce their reliance on these platforms as primary sales channels and instead consider them more as marketing tools.

Off-premise dining operations seek to leverage delivery platforms to introduce their menus

to new customers. Once customers are on board, the marketing team directs them to the restaurant's apps and websites for further orders.

This approach allows restaurants to expand their customer base by leveraging the popularity of delivery platforms while gaining more control over customer data, branding, and profits.

**i** In Europe, more restaurants are setting up company-owned online ordering systems to save costs, cater to customer preferences, and control customer data to enhance customer relations. Marketing budgets are being used differently. An increasing part of the budget is used to transfer platform customers to the restaurant's own online sales channels.



**“Apicbase helped us  
reduce our overall food  
costs by 8%.”**

**Learn More →**

**RENS BEKKERS**

Founder Bright Kitchen



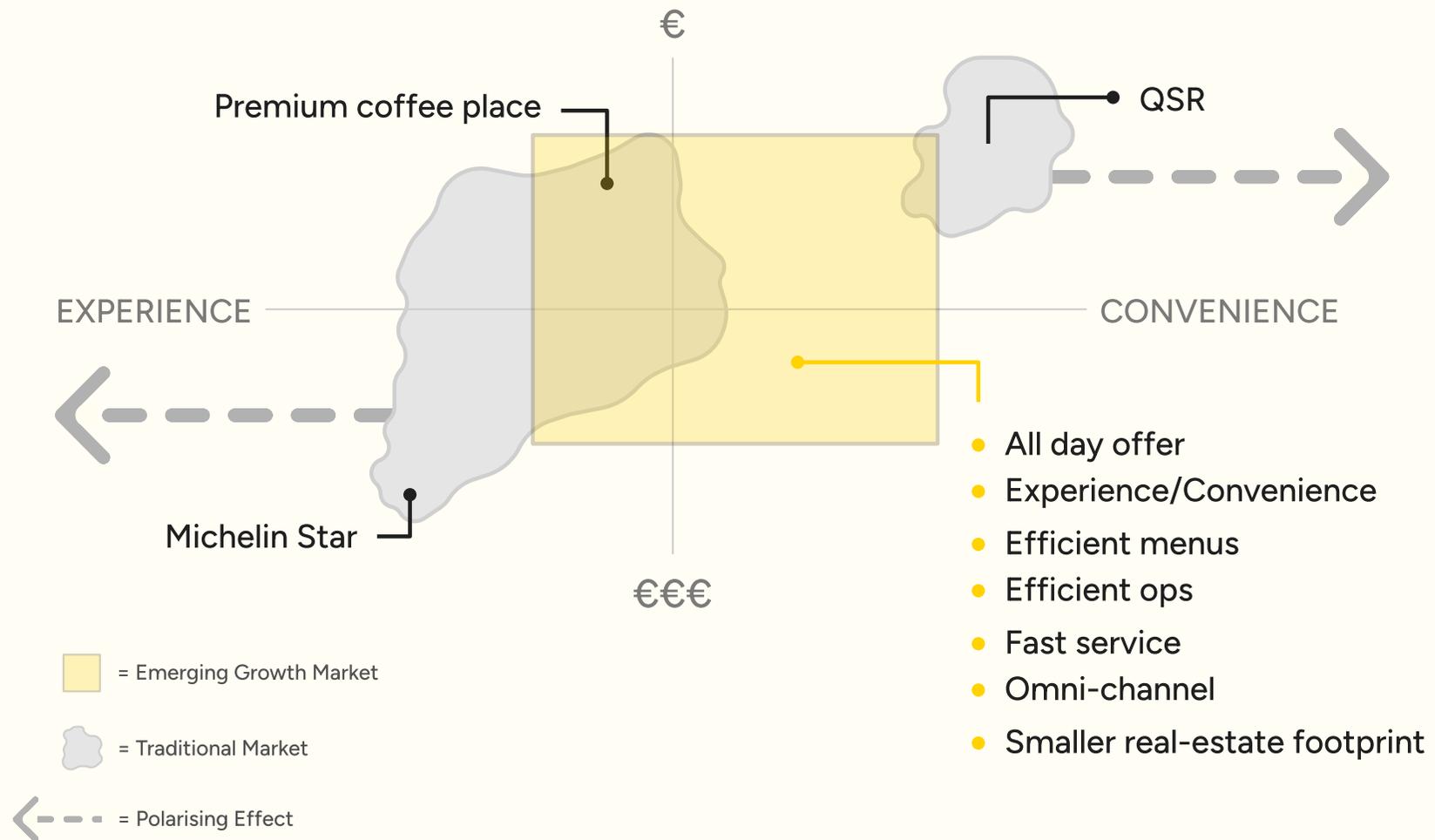
**Bright  
Kitchen**



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### 3. The Restaurant Landscape in Europe is Changing

# RESTAURANT MARKET EVOLUTION





If you quickly search this document, you'll find that the most used term is change.

After decades of comfortable stability, food service has entered a transitional phase. And compared to a few years ago, the pace of change is accelerating.

Where will it all go?

We expect the turmoil to continue for a while before things settle again. However, looking through the report, you'll see the outline of a new restaurant landscape emerging.

These 6 trends shaping the restaurant industry:

### 1. Are traditional restaurants going away?

No, they're getting better. These restaurants focus on experience. With increased competition from convenience-driven concepts, they have to double down on delivering unique experiences. Customers are willing to pay more as long as the price reflects the value of the experience.

### 2. Automation in QSR

Fast food joints were the first to adopt self-ordering kiosks and will continue to push for automation. Their business model centres on convenience at a low cost, but QSR isn't super cheap anymore. The gap with fast-casual is closing due to inflation and rising wages. Since operations are already super efficient, they have to find other ways to [keep labour costs under control](#)<sup>39</sup>. Automation and robotics help them get there.

### 3. Restaurant concepts with a small real estate footprint

Restaurant concepts with a small real estate footprint close to where people live or work have a leg up. "[Restaurant concepts with 50 seats](#)<sup>40</sup>, high margin products, strong omnichannel presence with an all-day part offer and an accessible price model are growing fast", says Henrik Mattsson, VP at Hospitio. "Operations can be done with 25-30 hours per day in these lean concepts."



Restaurant concepts with 50 seats, high margin products, strong omnichannel presence with an all-day part offer and an accessible price model are growing fast.

**HENRIK MATTSSON**

VP at Hospitio Group, Former Vice VP at Brödernas





#### 4. Rise of the hub-spoke model

[Central Production Units \(CPUs\)](#)<sup>41</sup> are becoming increasingly important for multi-site restaurants and food production. "The spoke-hub model helps centralise costs, reduce food waste, and achieve consistency in products across multiple locations," says [Gini Newton](#)<sup>42</sup> of Karma Kitchens. Also, the model boosts operational efficiency and allows for smaller kitchens on location, reducing the need for expensive equipment and skilled staff in the 'spoke' units.

#### 5. Multiple concepts, unified backend

Operational efficiency is key in the new food service era. That's why we expect more operators to manage several different restaurant concepts or brands, all supported by a shared, centralised backend system.

**The CPU works complimentary with our existing verticals of restaurants, off-premise food delivery brands, retail products and central distribution hub.**



**Tobi Lukaschek**  
Director at Rocket Restaurants

This way, operators can:

- a. Target different audiences and day parts with different cuisines without significantly increasing operational complexity.
- b. Marketing becomes more effective as the company app and website house all brands, allowing cross-marketing.
- c. Supply chain management is centralised, allowing for menu efficiencies, more significant volume discounts and stronger supplier relationships.
- d. Integrated tech systems streamline operations and provide valuable insights across all concepts.
- e. Some models include a central kitchen that prepares specific components or dishes for multiple concepts, further enhancing efficiency and consistency.
- f. The concentration of leadership, HR, inventory and finance departments simplifies management.



## 6. Sustainability, a licence to operate

It's been said before, and we'll say it again: forward-thinking companies are embracing ESG and reaping the benefits.

Max Burger stands out for its early commitment to sustainability, diligently tracking and reporting progress long before regulations required it to do so. The company is also a shining example for the marketing strategy it developed around sustainability and its position as a leader in that part of the market. What used to be a niche is now the centre of attention, and Max Burger has firmly established itself as a role model, making it difficult for other companies to take that position.

The Max Burger success story is infectious. We see their approach being adopted by more and more companies.

Contrary to common misconceptions, their example illustrates that sustainability efforts benefit not only the planet, but also the business itself.

Here are the five sustainability practices that have fuelled Max Burgers' success and profitability:

- **Targeted Sales:** "We've tapped into the LOHAS (Lifestyles of Health and Sustainability) segment, which makes up 46% of our sales. These are health- and eco-conscious customers who typically avoid fast food, but we've managed to attract them more effectively than our competitors."
- **Talent Management:** "In the competitive restaurant industry, retaining top talent is challenging. Our sustainable practices have cut recruitment costs and attracted superior talent eager to join us and stay longer."
- **Cost Reduction:** "By optimising our energy use, we've minimised costs. Grills are turned strategically. We keep food waste under 1% by meticulously tracking purchasing and consumption patterns, preventing customer over-ordering and over-purchasing by staff."





**We aimed to build a multi-generational company, which required us to create a business model that would remain competitive for decades. In this context, a commitment to sustainability is a given.**

**KAJ TÖRÖK**  
CSO at Max Burgers

- **Market Expansion:** “Our sustainability credentials attract strong partnerships and open doors to prime locations. For example, we're now collaborating with Sweden's largest event park, as our commitment to sustainability resonates with like-minded companies.”
- **Sustainable Business Model:** “Our long-term strategy is to meet society's evolving needs, aligning with the future. This forward-thinking approach is not just about adapting but driving innovation.”

## 7. Supply Chain First

Restaurants are changing how they handle their supply chains. They're leaning heavily into tech, using predictive analytics to keep their stocks just right.

A major development, though, is that food service companies are developing **deep collaborations** with their suppliers. This goes beyond simple transactions – it's about teaming up and working together closely. It's about understanding each other's processes and challenges and ensuring consistent

quality. These close collaborations are vital for keeping quality high and staying nimble in a fast-changing market.

Collaboration can take many forms, and integration can be superficial or deep. Brödernas, for example, develops the menu together with their F&B supplier: ‘They jump to the opportunity to be part of the success.’

At the same time, we anticipate an increase in restaurant chains and multi-site establishments collaborating to **combine their purchasing power**. To sustain growth and profitability, they need to reduce food costs. There's still a lot of potential for more collaboration in this area that has yet to be fully explored.

For that reason, too, we expect a rise in **acquisitions** within the restaurant industry, with more concepts being taken over or locations being absorbed by larger entities. A key driver for this trend is the added leverage these locations bring to centralised procurement processes. By joining larger groups or networks, individual restaurants or smaller chains can benefit from the enhanced purchasing power and efficiencies of a more extensive, centralised system.





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## 4. Conclusion



Both society in general and the food service industry in particular are riding a wave of significant change. Multiple transitions are happening simultaneously.

After a slow start, the transitions are gaining momentum. They are picking up speed, driven by cost management issues, evolving customer demands, tech advancements, and a more robust regulatory push for sustainability.

This evolution is reshaping the very core of how the industry operates.

What's more, there's a widening gap: companies that got ahead of the curve are pulling away from those who played the waiting game.

The past few years' turmoil has made this split more obvious, underlining the importance of developing the ability within a restaurant company to adapt quickly and instil forward-thinking in the fast-changing food service world.



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