



Consumer Foodservice in Finland

February 2024

Table of Contents

Consumer Foodservice in Finland

EXECUTIVE SUMMARY

Consumer foodservice in 2023: The big picture

2023 key trends

Competitive landscape

Independent foodservice developments

What next for consumer foodservice?

MARKET DATA

Table 1 - Units, Transactions and Value Sales in Consumer Foodservice 2018-2023

Table 2 - Units, Transactions and Value Sales in Consumer Foodservice: % Growth 2018-2023

Table 3 - Consumer Foodservice by Independent vs Chained by Type: Units/Outlets 2023

Table 4 - Consumer Foodservice by Independent vs Chained: % Foodservice Value 2018-2023

Table 5 - Sales in Consumer Foodservice by Food vs Drink Split: % Foodservice Value 2018-2023

Table 6 - Sales in Consumer Foodservice by Food vs Drink Split by Type: % Foodservice Value 2023

Table 7 - Sales in Consumer Foodservice by Location: % Foodservice Value 2018-2023

Table 8 - GBO Company Shares in Chained Consumer Foodservice: % Foodservice Value 2019-2023

Table 9 - GBN Brand Shares in Chained Consumer Foodservice: % Foodservice Value 2020-2023

Table 10 - GBN Brand Shares in Chained Consumer Foodservice: Units/Outlets 2023

Table 11 - Forecast Units, Transactions and Value Sales in Consumer Foodservice 2023-2028

Table 12 - Forecast Units, Transactions and Value Sales in Consumer Foodservice: % Growth 2023-2028

DISCLAIMER

SOURCES

Summary 1 - Research Sources

Cafés/Bars in Finland

KEY DATA FINDINGS

2023 DEVELOPMENTS

Bars/pubs recovers while specialist coffee and tea shops continues to gain value share from cafés

Outlet network disruptions in a highly fragmented competitive landscape

Bars and pubs leverage individuality

PROSPECTS AND OPPORTUNITIES

Challenges and opportunities lie ahead for cafés/bars

Cafés and bars retain an important social function

Digitalisation to continue to impact cafés/bars

CATEGORY DATA

Table 13 - Cafés/Bars by Category: Units/Outlets 2018-2023

Table 14 - Sales in Cafés/Bars by Category: Number of Transactions 2018-2023

Table 15 - Sales in Cafés/Bars by Category: Foodservice Value 2018-2023

Table 16 - Cafés/Bars by Category: % Units/Outlets Growth 2018-2023

Table 17 - Sales in Cafés/Bars by Category: % Transaction Growth 2018-2023

Table 18 - Sales in Cafés/Bars by Category: % Foodservice Value Growth 2018-2023

Table 19 - GBO Company Shares in Chained Cafés/Bars: % Foodservice Value 2019-2023

Table 20 - GBN Brand Shares in Chained Cafés/Bars: % Foodservice Value 2020-2023

Table 21 - Forecast Cafés/Bars by Category: Units/Outlets 2023-2028

Table 22 - Forecast Sales in Cafés/Bars by Category: Number of Transactions 2023-2028

Table 23 - Forecast Sales in Cafés/Bars by Category: Foodservice Value 2023-2028

Table 24 - Forecast Cafés/Bars by Category: % Units/Outlets Growth 2023-2028

Table 25 - Forecast Sales in Cafés/Bars by Category: % Transaction Growth 2023-2028

Table 26 - Forecast Sales in Cafés/Bars by Category: % Foodservice Value Growth 2023-2028

Full-Service Restaurants in Finland

KEY DATA FINDINGS

2023 DEVELOPMENTS

Full-service restaurants recover but the situation is not as rosy as it might appear

Players face dilemmas in the post-COVID-19 pandemic period

Independents dominate the competitive landscape

PROSPECTS AND OPPORTUNITIES

More affluent consumers to underpin the recovery of full-service restaurants

Challenges remain despite brighter prospects

Even less uniformity anticipated in the offer of full-service restaurants

CATEGORY DATA

Table 27 - Full-Service Restaurants by Category: Units/Outlets 2018-2023

Table 28 - Sales in Full-Service Restaurants by Category: Number of Transactions 2018-2023

Table 29 - Sales in Full-Service Restaurants by Category: Foodservice Value 2018-2023

Table 30 - Full-Service Restaurants by Category: % Units/Outlets Growth 2018-2023

Table 31 - Sales in Full-Service Restaurants by Category: % Transaction Growth 2018-2023

Table 32 - Sales in Full-Service Restaurants by Category: % Foodservice Value Growth 2018-2023

Table 33 - GBO Company Shares in Chained Full-Service Restaurants: % Foodservice Value 2019-2023

Table 34 - GBN Brand Shares in Chained Full-Service Restaurants: % Foodservice Value 2020-2023

Table 35 - Forecast Full-Service Restaurants by Category: Units/Outlets 2023-2028

Table 36 - Forecast Sales in Full-Service Restaurants by Category: Number of Transactions 2023-2028

Table 37 - Forecast Sales in Full-Service Restaurants by Category: Foodservice Value 2023-2028

Table 38 - Forecast Full-Service Restaurants by Category: % Units/Outlets Growth 2023-2028

Table 39 - Forecast Sales in Full-Service Restaurants by Category: % Transaction Growth 2023-2028

Table 40 - Forecast Sales in Full-Service Restaurants by Category: % Foodservice Value Growth 2023-2028

Limited-Service Restaurants in Finland

KEY DATA FINDINGS

2023 DEVELOPMENTS

Limited-service restaurants continues to develop and grow

Fafa's struggles but new initiatives abound in "other" limited-service restaurants

Grey economy is a problem for limited-service restaurants

PROSPECTS AND OPPORTUNITIES

Further growth anticipated in limited-service restaurants but there may be operating and employment issues

Chained concepts to remain strong in limited-service restaurants

Further growth opportunities for chicken limited-service restaurants

CATEGORY DATA

Table 41 - Limited-Service Restaurants by Category: Units/Outlets 2018-2023

Table 42 - Sales in Limited-Service Restaurants by Category: Number of Transactions 2018-2023

Table 43 - Sales in Limited-Service Restaurants by Category: Foodservice Value 2018-2023

Table 44 - Limited-Service Restaurants by Category: % Units/Outlets Growth 2018-2023

Table 45 - Sales in Limited-Service Restaurants by Category: % Transaction Growth 2018-2023

- Table 46 - Sales in Limited-Service Restaurants by Category: % Foodservice Value Growth 2018-2023
- Table 47 - GBO Company Shares in Chained Limited-Service Restaurants: % Foodservice Value 2019-2023
- Table 48 - GBN Brand Shares in Chained Limited-Service Restaurants: % Foodservice Value 2020-2023
- Table 49 - Forecast Limited-Service Restaurants by Category: Units/Outlets 2023-2028
- Table 50 - Forecast Sales in Limited-Service Restaurants by Category: Number of Transactions 2023-2028
- Table 51 - Forecast Sales in Limited-Service Restaurants by Category: Foodservice Value 2023-2028
- Table 52 - Forecast Limited-Service Restaurants by Category: % Units/Outlets Growth 2023-2028
- Table 53 - Forecast Sales in Limited-Service Restaurants by Category: % Transaction Growth 2023-2028
- Table 54 - Forecast Sales in Limited-Service Restaurants by Category: % Foodservice Value Growth 2023-2028

Self-Service Cafeterias in Finland

KEY DATA FINDINGS

2023 DEVELOPMENTS

- Self-service cafeterias continues to recover despite challenges
- Buffet eating continues to grow in popularity
- High inflationary pressure on unit prices

PROSPECTS AND OPPORTUNITIES

- Hybrid work and petrol/gas service-station developments to increase the pressure on self-service cafeterias
- Wider variety of meals with a focus on ethical issues
- Blurring the boundaries with retailing

CATEGORY DATA

- Table 55 - Self-Service Cafeterias: Units/Outlets 2018-2023
- Table 56 - Sales in Self-Service Cafeterias: Number of Transactions 2018-2023
- Table 57 - Sales in Self-Service Cafeterias: Foodservice Value 2018-2023
- Table 58 - Sales in Self-Service Cafeterias: % Units/Outlets Growth 2018-2023
- Table 59 - Sales in Self-Service Cafeterias: % Transaction Growth 2018-2023
- Table 60 - Sales in Self-Service Cafeterias: % Foodservice Value Growth 2018-2023
- Table 61 - GBO Company Shares in Chained Self-Service Cafeterias: % Foodservice Value 2019-2023
- Table 62 - GBN Brand Shares in Chained Self-Service Cafeterias: % Foodservice Value 2020-2023
- Table 63 - Forecast Self-Service Cafeterias: Units/Outlets 2023-2028
- Table 64 - Forecast Sales in Self-Service Cafeterias: Number of Transactions 2023-2028
- Table 65 - Forecast Sales in Self-Service Cafeterias: Foodservice Value 2023-2028
- Table 66 - Forecast Self-Service Cafeterias: % Units/Outlets Growth 2023-2028
- Table 67 - Forecast Sales in Self-Service Cafeterias: % Transaction Growth 2023-2028
- Table 68 - Forecast Sales in Self-Service Cafeterias: % Foodservice Value Growth 2023-2028

Street Stalls/Kiosks in Finland

KEY DATA FINDINGS

2023 DEVELOPMENTS

- Street stalls/kiosks struggles to increase its weight in consumer foodservice
- Ice cream kiosks remain popular
- International recognition for Finnish street food

PROSPECTS AND OPPORTUNITIES

- Fluctuation anticipated in the forecast period performance
- "24/7 society" represents a threat and opportunity for street stalls/kiosks
- Street stalls/kiosks between retro and innovation

CATEGORY DATA

- Table 69 - Street Stalls/Kiosks: Units/Outlets 2018-2023
- Table 70 - Sales in Street Stalls/Kiosks: Number of Transactions 2018-2023
- Table 71 - Sales in Street Stalls/Kiosks: Foodservice Value 2018-2023
- Table 72 - Street Stalls/Kiosks: % Units/Outlets Growth 2018-2023
- Table 73 - Sales in Street Stalls/Kiosks: % Transaction Growth 2018-2023
- Table 74 - Sales in Street Stalls/Kiosks: % Foodservice Value Growth 2018-2023
- Table 75 - GBO Company Shares in Chained Street Stalls/Kiosks: % Foodservice Value 2019-2023
- Table 76 - GBN Brand Shares in Chained Street Stalls/Kiosks: % Foodservice Value 2020-2023
- Table 77 - Forecast Street Stalls/Kiosks: Units/Outlets 2023-2028
- Table 78 - Forecast Sales in Street Stalls/Kiosks: Number of Transactions 2023-2028
- Table 79 - Forecast Sales in Street Stalls/Kiosks: Foodservice Value 2023-2028
- Table 80 - Forecast Street Stalls/Kiosks: % Units/Outlets Growth 2023-2028
- Table 81 - Forecast Sales in Street Stalls/Kiosks: % Transaction Growth 2023-2028
- Table 82 - Forecast Sales in Street Stalls/Kiosks: % Foodservice Value Growth 2023-2028

Consumer Foodservice By Location in Finland

KEY DATA FINDINGS

2023 DEVELOPMENTS

- Standalone continues to dominate the location landscape
- Pressure on petrol/gas station-based outlets

PROSPECTS AND OPPORTUNITIES

- More focus on consumer foodservice at Helsinki Airport
- Consumer foodservice and retailing boundaries blur

CATEGORY DATA

- Table 83 - Consumer Foodservice by Location: Units/Outlets 2018-2023
- Table 84 - Sales in Consumer Foodservice by Location: Number of Transactions 2018-2023
- Table 85 - Sales in Consumer Foodservice by Location: Foodservice Value 2018-2023
- Table 86 - Consumer Foodservice by Location: % Units/Outlets Growth 2018-2023
- Table 87 - Sales in Consumer Foodservice by Location: % Transaction Growth 2018-2023
- Table 88 - Sales in Consumer Foodservice by Location: % Foodservice Value Growth 2018-2023
- Table 89 - Consumer Foodservice through Standalone: Units/Outlets 2018-2023
- Table 90 - Sales in Consumer Foodservice through Standalone: Number of Transactions 2018-2023
- Table 91 - Sales in Consumer Foodservice through Standalone: Foodservice Value 2018-2023
- Table 92 - Consumer Foodservice through Standalone: % Units/Outlets Growth 2018-2023
- Table 93 - Sales in Consumer Foodservice through Standalone: % Transaction Growth 2018-2023
- Table 94 - Sales in Consumer Foodservice through Standalone: % Foodservice Value Growth 2018-2023
- Table 95 - Consumer Foodservice through Leisure: Units/Outlets 2018-2023
- Table 96 - Sales in Consumer Foodservice through Leisure: Number of Transactions 2018-2023
- Table 97 - Sales in Consumer Foodservice through Leisure: Foodservice Value 2018-2023
- Table 98 - Consumer Foodservice through Leisure: % Units/Outlets Growth 2018-2023
- Table 99 - Sales in Consumer Foodservice through Leisure: % Transaction Growth 2018-2023
- Table 100 - Sales in Consumer Foodservice through Leisure: % Foodservice Value Growth 2018-2023
- Table 101 - Consumer Foodservice through Retail: Units/Outlets 2018-2023
- Table 102 - Sales in Consumer Foodservice through Retail: Number of Transactions 2018-2023
- Table 103 - Sales in Consumer Foodservice through Retail: Foodservice Value 2018-2023
- Table 104 - Consumer Foodservice through Retail: % Units/Outlets Growth 2018-2023
- Table 105 - Sales in Consumer Foodservice through Retail: % Transaction Growth 2018-2023
- Table 106 - Sales in Consumer Foodservice through Retail: % Foodservice Value Growth 2018-2023
- Table 107 - Consumer Foodservice through Lodging: Units/Outlets 2018-2023

Table 108 - Sales in Consumer Foodservice through Lodging: Number of Transactions 2018-2023
Table 109 - Sales in Consumer Foodservice through Lodging: Foodservice Value 2018-2023
Table 110 - Consumer Foodservice through Lodging: % Units/Outlets Growth 2018-2023
Table 111 - Sales in Consumer Foodservice through Lodging: % Transaction Growth 2018-2023
Table 112 - Sales in Consumer Foodservice through Lodging: % Foodservice Value Growth 2018-2023
Table 113 - Consumer Foodservice through Travel: Units/Outlets 2018-2023
Table 114 - Sales in Consumer Foodservice through Travel: Number of Transactions 2018-2023
Table 115 - Sales in Consumer Foodservice through Travel: Foodservice Value 2018-2023
Table 116 - Consumer Foodservice through Travel: % Units/Outlets Growth 2018-2023
Table 117 - Sales in Consumer Foodservice through Travel: % Transaction Growth 2018-2023
Table 118 - Sales in Consumer Foodservice through Travel: % Foodservice Value Growth 2018-2023
Table 119 - Forecast Consumer Foodservice by Location: Units/Outlets 2023-2028
Table 120 - Forecast Sales in Consumer Foodservice by Location: Number of Transactions 2023-2028
Table 121 - Forecast Sales in Consumer Foodservice by Location: Foodservice Value 2023-2028
Table 122 - Forecast Consumer Foodservice by Location: % Units/Outlets Growth 2023-2028
Table 123 - Forecast Sales in Consumer Foodservice by Location: % Transaction Growth 2023-2028
Table 124 - Forecast Sales in Consumer Foodservice by Location: % Foodservice Value Growth 2023-2028
Table 125 - Forecast Consumer Foodservice through Standalone: Units/Outlets 2023-2028
Table 126 - Forecast Sales in Consumer Foodservice through Standalone: Number of Transactions 2023-2028
Table 127 - Forecast Sales in Consumer Foodservice through Standalone: Foodservice Value 2023-2028
Table 128 - Forecast Consumer Foodservice through Standalone: % Units/Outlets Growth 2023-2028
Table 129 - Forecast Sales in Consumer Foodservice through Standalone: % Transaction Growth 2023-2028
Table 130 - Forecast Sales in Consumer Foodservice through Standalone: % Foodservice Value Growth 2023-2028
Table 131 - Forecast Consumer Foodservice through Leisure: Units/Outlets 2023-2028
Table 132 - Forecast Sales in Consumer Foodservice through Leisure: Number of Transactions 2023-2028
Table 133 - Forecast Sales in Consumer Foodservice through Leisure: Foodservice Value 2023-2028
Table 134 - Forecast Consumer Foodservice through Leisure: % Units/Outlets Growth 2023-2028
Table 135 - Forecast Sales in Consumer Foodservice through Leisure: % Transaction Growth 2023-2028
Table 136 - Forecast Sales in Consumer Foodservice through Leisure: % Foodservice Value Growth 2023-2028
Table 137 - Forecast Consumer Foodservice through Retail: Units/Outlets 2023-2028
Table 138 - Forecast Sales in Consumer Foodservice through Retail: Number of Transactions 2023-2028
Table 139 - Forecast Sales in Consumer Foodservice through Retail: Foodservice Value 2023-2028
Table 140 - Forecast Consumer Foodservice through Retail: % Units/Outlets Growth 2023-2028
Table 141 - Forecast Sales in Consumer Foodservice through Retail: % Transaction Growth 2023-2028
Table 142 - Forecast Sales in Consumer Foodservice through Retail: % Foodservice Value Growth 2023-2028
Table 143 - Forecast Consumer Foodservice through Lodging: Units/Outlets 2023-2028
Table 144 - Forecast Sales in Consumer Foodservice through Lodging: Number of Transactions 2023-2028
Table 145 - Forecast Sales in Consumer Foodservice through Lodging: Foodservice Value 2023-2028
Table 146 - Forecast Consumer Foodservice through Lodging: % Units/Outlets Growth 2023-2028
Table 147 - Forecast Sales in Consumer Foodservice through Lodging: % Transaction Growth 2023-2028
Table 148 - Forecast Sales in Consumer Foodservice through Lodging: % Foodservice Value Growth 2023-2028
Table 149 - Forecast Consumer Foodservice through Travel: Units/Outlets 2023-2028
Table 150 - Forecast Sales in Consumer Foodservice through Travel: Number of Transactions 2023-2028
Table 151 - Forecast Sales in Consumer Foodservice through Travel: Foodservice Value 2023-2028
Table 152 - Forecast Consumer Foodservice through Travel: % Units/Outlets Growth 2023-2028
Table 153 - Forecast Sales in Consumer Foodservice through Travel: % Transaction Growth 2023-2028
Table 154 - Forecast Sales in Consumer Foodservice through Travel: % Foodservice Value Growth 2023-2028

About Euromonitor International

Euromonitor International is an independent market intelligence provider. Data, insight and analysis stem from in-the-field research spanning 210 national markets.

Content ranges from the in-depth and country-specific, to key strategic themes with a global range and significance. Products cover a comprehensive range of insights and market data, but can be broadly categorised as:

- **Strategy Briefings:** Global or regional in scope, and focussing on the most important themes shaping consumer demand, the key markets, competitive environment and future outlook across a range of industries.
- **Company Profiles:** Analysis dedicated to the world's most significant companies, with detailed insight into their activities, focus of operations, their competitors, their geographic presence and performance.
- **Country Reports:** For an in-depth understanding of specific countries, whether by industry, economic metrics or consumer trends and lifestyles. These reports cover current trends, consumer demand, market potential and future prospects, with country-specific local insight and comprehensive data, unavailable elsewhere.

For more information on this report, further enquiries can be directed via this link www.euromonitor.com/consumer-foodservice-in-finland/report.