

# Just Eat Report 2025

**How Switzerland orders: delivery trends,  
data analysis and insights**



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# Foreword by Lukas Streich, Head of Just Eat Switzerland

Global political and economic turbulence is shaping the international situation. Uncertainty can also be seen in Switzerland, and noticeable price increases in key areas of life, from food and rent to health insurance premiums, are putting pressure on many households. Consumers are becoming more cautious and are deliberately rethinking their spending habits.

It may sound like a paradox, but it is precisely in times like these that the need for balance and small pleasures grows. The idea is: 'I'm treating myself to something for my well-being.' This quest for moments of happiness can be found in enjoying a cosy evening at a restaurant, buying high-quality products or ordering conveniently at home. The trend is confirmed by the PostFinance consumption indicator from September 2025, which found that adjusted leisure expenditures have reached a new all-time high. This includes investments in hobbies, leisure activities or new clothes. Something particularly striking is that more and more people are eating out increasingly often.

Our own data also reflects this development and at the same time shows that consumer behaviour is changing. That's

why this year, we're presenting 10 trends that reflect a multitude of subtle tendencies and capture the current social and economic climate. From these, three overarching customer needs can be derived: the desire for small, affordable luxury, the longing for an uncomplicated everyday life – and, as a fundamental factor, the need for absolute reliability. Consumers' expectations are clear: they want to receive the exact product at the agreed time.



Two years ago already, Just Eat took on a pioneering role when on-demand partners were integrated into the platform for the first time. In 2025, we significantly expanded our product range – with pet food, flowers, self-care and health products along with everyday groceries – in response to the changing needs of our customers. You can find some exciting insights into the on-demand trend on page 32.

Looking ahead to the coming year, I am excited to work with our new owner Prosus to further develop and use technology, innovation and artificial intelligence to make our customers' daily lives easier, more efficient and more reliable – by always delivering the right product.

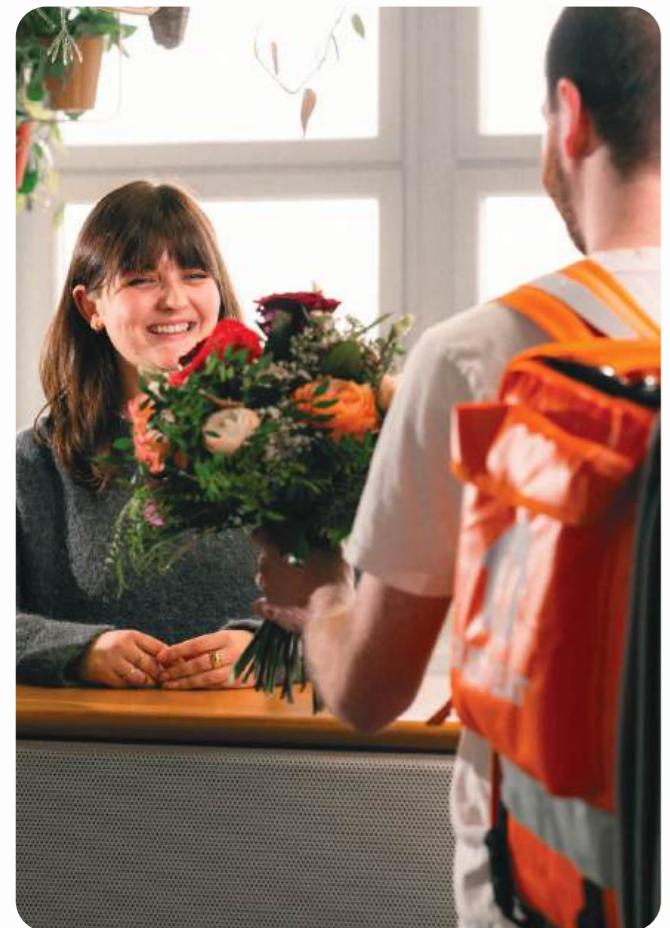
Happy reading!  
**Lukas Streich**



# Month by month – our highlights from this year

## January

At the beginning of the year, we launched a partnership with the leading flower delivery service Fleurop. At present, 40 Fleurop branches across Switzerland offer a wide range of flowers, arrangements and plants on our platform, which we deliver to our customers within 45 minutes.



## February

In February, Just Eat honoured its most popular partner businesses with the Best Restaurant Awards. During the cooking competition with TV chef David Geisser, Li-Beirut from Winterthur impressed with its Lebanese specialities and won the title of Best Restaurant Switzerland.

- Just Eat presented the **Best Restaurant Awards** for the fourth time with 24 categories – more than ever before.
- The **Best Grocery** category (winner: SPAR supermarket in Basel) also saw an award presented in the on-demand area for the first time.

- Preparing their signature dishes at the cooking competition were: Yvonne & Nala (winner of the Best Fusion Kitchen category), Sheesh by Danny Khezzar (winner of the Innovators category) from Geneva and Li-Beirut (winner of the Best in Winterthur category).



## March

In spring, we launched our collaboration with the boutiques of French jam specialist Bonne Maman. The classic range along with fresh baked goods, including the popular cupcakes, are delivered from the stores in Basel, Bern, Winterthur and Zurich.



## April

As of April, Just Eat has expanded its logistics operations to numerous Swiss cities. This will enable us to integrate even more partners on our platform in the future and offer customers a more diverse selection, including an increasing number of on-demand products such as flowers from Fleurop, pet food from Fressnapf and groceries from SPAR.



## May

With the McDonald's Restaurant in Collonge-Bellerive near Geneva, we signed our 6,000th partnership. The collaboration with McDonald's also began in Geneva five years ago. Today, our customers can place orders for a Big Mac or Chicken McNuggets in over 100 branches across Switzerland.



## June

As an official sponsor of UEFA Women's EURO 2025 in Switzerland, Just Eat launched the Feed the Game initiative. This focused on free football camps in Basel, Zurich and Geneva to promote girls' football at the grassroots level. The ambassador for the initiative was eight-time Swiss footballer of the year, Lara Dickenmann.

- In another move for **UEFA Women's EURO 2025**, Just Eat activated the **Quick Collect** mobile ordering system in the **Basel, Geneva and St. Gallen** stadiums. This allowed fans to order their meals and drinks conveniently on their smartphone from the moment the doors opened until the end of the match and pick them up from a dispensing point at their desired time without queuing up.
- Likewise, Just Eat joined forces with **ClimateTech partner MyEmissions**, winner of last year's **UEFA Champions Innovate programme**, to introduce CO<sub>2</sub> labels on menus at all eight WEURO stadiums.



## July

Following its successful launch in other markets, Just Eat established the self-care segment in Switzerland as well. Our platform collaborates exclusively with Magic X, the Swiss market leader for erotic and lifestyle products. Best-sellers on the Just Eat platform include condoms, lubricants and vibrators.

- Just Eat in **Basel** additionally provided compostable algae-coated takeaway packaging from **Notpla**. The innovative boxes completely decompose within a few weeks and were awarded the prestigious **Earthshot Prize** by Prince William in 2022.



## August

In midsummer, Just Eat teamed up with Zurich-based robotics company RIVR to introduce the delivery of food using autonomous ground-level robots in Zurich-Oerlikon. The robot delivered fresh kebabs from the Zekis World restaurant run by social media star Zeki Bulgurcu, making Just Eat the first delivery service in Europe to use robots with physical AI on this scale.

### What our new delivery hero can do:

- **Speed:** 15 km/h, combines wheels and legs for stairs and curbs.
- **Surroundings:** AI detects obstacles, pedestrians, vehicles and cyclists.
- **Capacity:** 40 litres, with coated inner wall to protect against leakage.

- **Safety functions:** emergency stop, lights, flag for visibility day and night.
- **Weatherproof:** travels in rain, snow, heat and strong winds.

Scan the QR code with your smartphone to see the robot in action:



## September

Just Eat enabled the app functionality on vehicle screens, allowing meals and groceries to be ordered directly from the car. The app is now available in the Mercedes-Benz In-Car App Store and can be conveniently controlled via touch or voice command using the vehicle's MBUX display.



## October

Whether cold remedies, baby food or first aid items, thanks to the new partnership with BENU pharmacies, customers in selected Swiss cities can order hundreds of over-the-counter health and wellness products. Express delivery works exclusively through Just Eat logistics.

## November

We delivered our 10,000th order for our partner Shell mio Shop! The supermarket and fresh produce offering on the Just Eat app – customers can currently order from more than 20 locations – is a real game-changer when the fridge is running low, something was forgotten during the last shopping trip or a surprise guest is on the way.



## December

We're celebrating Christmas as a team! Together, we're looking back on a successful year, celebrating our achievements and spending time together. We form a truly winning team – from marketing and customer service, sales, finance and business intelligence to logistics and many other areas.



# The 10 delivery trends of 2025

## Simple indulgence – the glimmers of Generation X

Generation X – born between 1965 and 1980 – is currently in a phase of life full of balancing acts: established in their career, financially stable and caught between the needs of growing children and ageing parents all at the same time. Amid this double burden, little everyday moments, known in marketing jargon as glimmers, are becoming more important: the smell of freshly baked bread, the first sip of coffee, the feeling of security. This need for simplicity is also reflected in eating habits – classic dishes reminiscent of childhood and home are all the rage. According to Just Eat market research, 45- to 60-year-olds strongly associate these foods with positive emotions. Orders for dishes described as 'homemade' increased by 50%, while orders for cordon bleu rose by 40%.

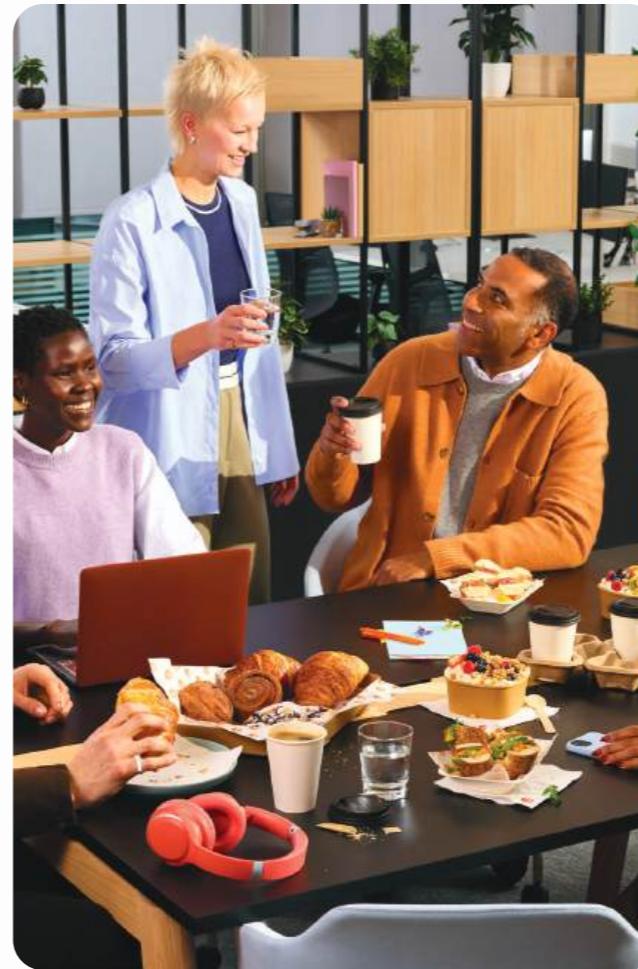


## Go mini – the rise of mindful little treats

More and more people are choosing smaller portions for economic reasons and to stay flexible. At Just Eat, demand for sharing meals increased by 40% compared to the previous year, while orders without a traditional main course went up by 10%. The mini format stands for more conscious consumer behaviour that still leaves room for curiosity. People who order smaller dishes can try more: new flavours, unfamiliar cuisines, unusual combinations. In gastronomy and delivery services, this is leading to a growing variety of sharing plates, bowls, wraps and bento boxes. This trend shows how much eating habits are adapting to a new everyday feeling: less abundance, more choice – and a new desire to discover things on a small scale.

## #CorporateLunch – Gen Z is redefining the office lunch

Generation Z's office meals not only reflect personal values, but are also documented under #CorporateLife on TikTok. This has led to a growing demand for flexible and personalised catering solutions that go beyond traditional canteens. Despite the financial strain of returning to the office, Gen Z is deliberately looking for ways to upgrade its meals. Partners are responding with affordable yet high-quality, fresh and nutritious offerings that bring together global flavours and textures. Vegetable-oriented dishes, often combined with strong flavours from Latin American or Southeast Asian cuisines, are particularly popular. In multi-dimensional salads and bowls, sauces such as macadamia lime and add-ons like pickled chilli or roasted cashews are becoming new 'little luxuries'.



## Powered by pop – revamping the lifestyle drink

In the beverages sector, Generation Z is displaying a fascinating ambivalence: on the one hand, they are consuming alcohol more consciously and often less of it, prioritising the taste experience over the price. On the other hand, this attitude goes hand in hand with a keen interest in experimentation. Drinks have long been more than just something to quench thirst – they're considered an expression of lifestyle and individuality. Soft drinks are undergoing a major upgrade and developing into complex, energising creations. Dirty sodas with energy drinks, syrups and fruit juices are particularly popular. The order numbers in the coffee and functional drinks categories clearly demonstrate this change: Matcha drinks recorded the strongest growth (+130%), followed by chai drinks (+110%). Cold brew also increased by 55%, while orders for coconut beverages and kombucha drinks were more frequent this year, rising by 45% and 38% respectively.

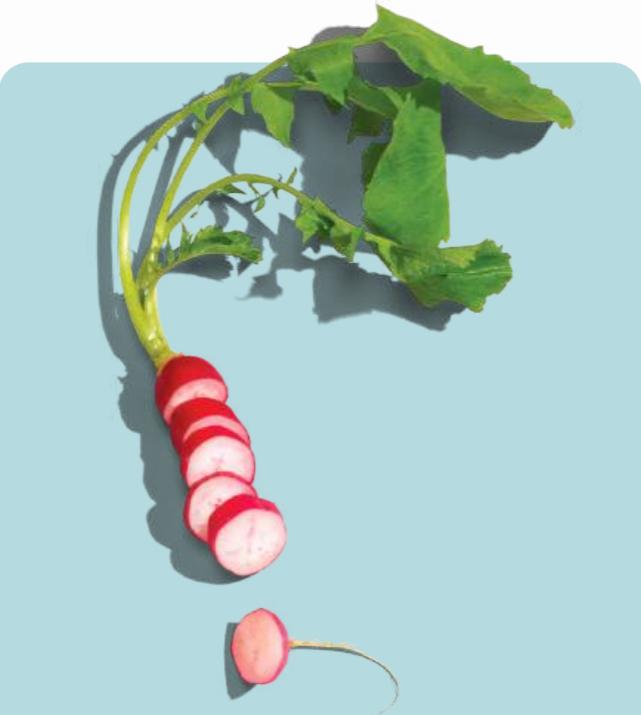
## Plant-forward – the new natural focus of plant-based cuisine

The plant-based trend is constantly evolving: while the first wave focused heavily on industrially manufactured meat and dairy substitutes, today sees more emphasis being placed on natural foods. The focus is shifting away from imitating traditional meat dishes and towards appreciating plant-based products as independent, fully-fledged protein sources. Just Eat recorded 25% more orders for dishes made with lentils, beans or chickpeas than in the previous year. These ingredients are particularly popular in curries and salads, or when further processed into products such as falafel. For example, Just Eat partner Action Burger offers a vegetarian patty made from a mixture of mushrooms. This approach offers an authentic, less processed alternative for consumers who want to eat more consciously for health or environmental reasons.

## On-demand economy – the time-saving revolution

In a world where time has become the most valuable currency, on-demand delivery is becoming established as a profound cultural shift. The aim is to give the customer full control over the delivery time and location. With the 'Empower Everyday Convenience' vision, Just Eat has focused heavily on on-demand and built numerous partnerships. Orders increased by 520% year-on-year. Food, health products, self-care items and flowers are in particular demand. The underlying principle is 'less effort, more living'. At the same time, product categories in which Speed Seekers (find out more on page 32) particularly value

privacy are growing in importance; for 72% of this group, the ability to discreetly order sensitive products such as pregnancy tests is crucial.



## Hyperlocal – a focus on immediate proximity

For a long time, the Just Eat platform was dominated by pizza, burgers and doner kebabs – today, the range of offerings is being enriched by more and more businesses that opt not only for regional, but also hyperlocal ingredients. The trend towards proximity, authenticity and transparency reflects the growing awareness of customers for the quality, sustainability and origin of food. It practically does away with supply chains: the meat comes from the village butcher's, the green lettuce from the restaurant garden and the potatoes are grown on the local mountain. What is already established in gastronomy is now also suitable for delivery, allowing customers to enjoy the taste of fresh, local ingredients conveniently

delivered to their doorstep. At the same time, the hyperlocal trend is opening up new opportunities for restaurants to set themselves apart and involve the local community more closely.

## Umami – the depth of the fifth taste

Umami – a Japanese term meaning 'delicious' or 'tasty' – is the fifth basic taste alongside sweet, sour, salty and bitter. Derived from the amino acid glutamate, it refines dishes, balances flavours and ensures a hearty, full-bodied experience. The characteristic flavour occurs naturally in foods such as ripe tomatoes, Parmesan, mushrooms and soy sauce. Classic umami boosters include ramen dishes or miso soup. Its popularity can also be seen in the figures: orders with miso components increased by 70%, while the number of dishes with kimchi (currently 120 on the platform) rose by 65% compared to the previous year. Dishes with shiitake mushrooms and water spinach (water morning glory) are also becoming increasingly popular.



## Protein power play – the building block for every meal

The trend towards a conscious, protein-rich diet extends far beyond the fitness niche. Consumers see protein as an essential building block for a lasting feeling of fullness, increased energy levels and general well-being. This growing awareness is leading to a strong demand for dishes that allow for a flexible and personalised protein intake. Partners are responding by transforming dishes – particularly bowls and salads – into customisable protein hubs. Customers can choose from both classic options (chicken, tuna or beef) and plant-based alternatives such as tofu, with orders of the latter increasing by 57% in the last three years. The high relevance is reflected across the entire range: there are now more than 50 bowl concepts online on the Just Eat platform.



## Personalised – where customers are the co-designer

Driven by the megatrend of individualisation, advancing digitalisation and growing health awareness, the trend towards personalisation is increasingly leaving its mark on the Just Eat platform. Many dishes can be precisely adapted to individual needs and health goals. The desire for maximum freedom in their composition has now become the norm. The option for customers to create their own bowls or salads is used five times more often at Just Eat than ready-made dishes. Once again, the create-your-own pizza option has proven to be one of the most popular options, with growth of 350% in the last five years; in total, around 700 partners currently offer this option. The development also extends to beverages: at Starbucks, for example, customers can choose from seven types of milk, six syrup strengths and various coffee roasts.



Since 2023, the number of individually configurable dishes and drinks available on Just Eat has grown by nearly 200%.



# Five questions for... Pascal Grob, blogger of *Züri isst*

## 1. What food trends are you currently seeing in Switzerland that you think will become established in the long term?

I don't have a crystal ball I can look into, but I hope that the following three movements are here to stay: the radicalisation of quality, the casualisation of fine cuisine and the new seriousness of regionality.

First of all: the focus on products and craftsmanship. Good bakeries, roasteries, natural wine bars and small restaurants with a distinct signature are no longer a fad, but the new staples of the urban middle class. Sourdough instead of baking mix, real stock instead of gravy from the tube – cuisine with attitude instead of convenience food. Guests notice the difference and come back.

Secondly: casual fine dining. Top-tier menus, but in a T-shirt friendly setting. In Zurich, Bern or Geneva, you no longer need tablecloths to get someone to eat seven courses for 160 francs. What matters most are the atmosphere, product quality, music, a good glass of wine – and cuisine that operates with precision without coming off as rigid. This is the style of a generation that has no problem sitting at the counter instead of in the dining room.

Thirdly: conscious meat consumption and a greater focus on vegetables. It's not about avoidance, but rather relevance. Vegetables, pulses and grains are coming to the fore, meat portions are becoming smaller, better and more expensive – and ideally, the entire animal is utilised. This aligns with Swiss values

such as regionality and sustainability and the reality that good animal products are expensive.

In addition, genuine regional concepts are gaining ground – businesses that actually work with local producers instead of just writing 'regional' on the menu. Anyone who does this credibly will survive, because guests are looking for orientation in an uncertain world – and that includes on the plate.

## 2. Which trends do you consider to be more of a flash in the pan?

Anything that is served primarily for the Instagram feed has a short half-life. That includes exaggerated gimmicks without any culinary substance – burgers that are taller than the guest next to them, drinks with more decoration than contents, desserts that look like art installations but only taste like sugar. This works once for a photo, but nobody builds up a regular customer base using TikTok tricks.



Then, fake authenticity: hyperconceptual ghost kitchens with no identity or restaurants adorned with buzzwords like street food, omakase or izakaya without understanding the culture behind them. That may last a summer until guests realise that they are paying for a business plan rather than substance.

## 3. How do you assess the paradox that while households are saving, more and more expensive concepts are emerging?

This is simply a shift: people save on average and splurge on special moments. Instead of eating mediocre meals three times, many people are treating themselves to something really good – a local smashburger hit instead of the standard burger patty, a bakery with real sourdough instead of industrial rolls from major distributors. Food becomes a deliberately chosen micro-luxury when rent and health insurance are already spoiling the mood.

At the same time, gastronomy can be a social outlet: people who can't afford long-distance travel can book Tokyo or Saigon locally – through ramen stores or Vietnamese pop-ups. This satisfies the need to experience something rather than just to consume.

It becomes problematic when the upper price segment becomes an excuse to sell standard quality at luxury prices. If a croissant costs more than five francs, it will have to do more than just look pretty – it needs to have impressive craftsmanship, taste and ethics. These days, guests are informed and can make comparisons – and are gone faster than the barista can say 'single origin'.

## 4. What makes the Swiss consumer different? Are they less brave?

In short, yes, much more conservative – but far more curious than 10 years ago. The Swiss guest is quality-conscious, loyal and keeps risks to a minimum. Once a restaurant has won their heart, they will stay for years, visit with family and friends, and forgive a weaker evening. At the same time, people often lack a sense of what gastronomy costs. Many people underestimate how many hours of work, preparation time and hidden fixed costs go into a single plate. If a dish is expensive, it has to win them over immediately.

Compared to cities like London, Copenhagen and Paris, comfort zones are more common in Switzerland. Very spicy dishes, pronounced fermentation, offal or unusual textures need more time to be accepted. In Paris, someone will sit at the counter, eat some pig's head terrine and post a selfie. In Zurich, we have to discuss the consistency first. But the urban generation has become more adventurous. Not only do they travel, they also scroll. What happens in New York or Copenhagen ends up on their feed two days later – and eventually on a menu in Zurich or Bern.

## 5. Which country – or which cities – do you see as pioneers?

I would actually say cities rather than countries. Four areas lead the field for me: London, New York and Los Angeles are absolute trend catalysts. Casual fine dining formats, next-level fast food, hybrid bars and wild menus that effortlessly combine cultures are created in those places. The blend of immigration history, competitive pressure and the creative scene gives birth to trends before Europe even realises that something is coming.

Copenhagen is the laboratory for fermentation, product proximity and a new vegetarian signature. It originated the attitude that a carrot deserves the same dedication as a beef fillet – and that depth is not dependent on the number of ingredients or cooking techniques.

Japan is the silent pace-setter. Ramen bars, omakase counters, an obsession with detail – much of that can be traced back to Japanese discipline, repetition and precision. Japan doesn't export any loud trends – it exports standards.

And finally: Paris. Perhaps the most exciting melting pot in Europe. A young generation of chefs are combining their cultural roots – often back in Southeast or East Asia – with French techniques to create a new language. Vietnamese herbs meet beef tartar, or Japanese techniques meet pigeon or lamb. This generation does not think in terms of limits, but in terms of possibilities. That's why Paris is a place where culinary ideas not only emerge, but immediately become relevant.

# All eyes on: Gen Z

Generation Z is considered the driver of new trends in the food delivery sector. It values sustainable, healthy and customisable consumption along with fast and convenient services, all while remaining mindful of diversity and social responsibility.

The global expenditure of Generation Z is estimated to grow to **12 trillion US dollars** by 2030.

Its priorities are clear: food and drink are more than just nutritional intake – they're an expression of well-being, community and self-fulfilment.



A survey by Publicis Media found that **despite limited resources**, in Switzerland, Generation Z put a high value on branded products (46% of respondents).

When it comes to social media behaviour in Switzerland, Generation Z uses Instagram most often. According to a survey by Neoviso, **56% consume content about food and nutrition**, followed by sports and travel.



Despite its desire for convenience and simplicity, Generation Z attaches great **importance to quality** and views high-quality food as an **affordable luxury**. Since traditional luxury goods are often financially unaffordable, a study by Deloitte shows that they prefer to invest in **premium groceries or in upgrading meals**.



# How Switzerland ordered in 2025

To gain a better understanding of ordering behaviour at midday and in the evening, we used AI to analyse our data.

## Lunch

At midday, the doner box is a real hit and takes the sixth spot on the popularity scale. In the evening, it's ranked ninth – a clear indication of its primary appreciation as a quick lunch. Drinks such as Coca-Cola and Red Bull are also in high demand; Red Bull is even one of the 15 most ordered products. Many people therefore deliberately reach for a little energy boost around lunchtime.



## Dinner

Pizza Margherita is the undisputed favourite in the evening – much more popular than at lunchtime. French fries take the second spot in the evening (fourth place at midday), while pizza Hawaii is ranked 10th (15th at midday). Create-your-own pizzas and mixed salad only appear in the top 20 in the evening – an indication that individuality and healthier options are more in demand in the evening.





## The 10 most popular dishes

1. Pizza Margherita
2. Pizza Prosciutto
3. French fries
4. Cheeseburger
5. Pizza Kebab
6. Doner box
7. Pizza Hawaii
8. Create-your-own pizza
9. Mixed salad
10. Butter chicken NEW



## The most popular starters

1. Edamame
2. Bruschetta
3. Gyoza with chicken
4. Papaya salad
5. Vegetable spring rolls

## The newcomers

1. Beef momos
2. Pad Thai
3. Sweet potato fries
4. Thai curry
5. California roll



## The most popular desserts

1. Tiramisu
2. Apple turnover
3. Chocolate mousse
4. Doughnut
5. Panna cotta



## The most popular drinks

1. Coca-Cola
2. Feldschlösschen
3. Red Bull
4. Fanta
5. Heineken



## The most popular groceries

1. Bananas
2. Avocado
3. Yoghurt
4. Onions
5. Mayonnaise

## A culinary journey around the world: the most popular food categories at Just Eat

More than 70 categories are available on the Just Eat platform – from tacos to Syrian food to organic groceries. Here are the best-selling products from the most popular categories.



# How the cantons ordered in 2025

## Most alcohol orders

1. St. Gallen
2. Basel-Landschaft
3. Lucerne



The most popular alcoholic drink by far is **Feldschlösschen beer**.



## Most self-care orders

1. Zurich
2. Geneva
3. Basel-Stadt

In Zurich, the most-sold products include **lubricants, male sex toys and red handcuffs**. In Geneva, **love balls with wireless remotes** are very popular, while in Basel, **delay spray** is particularly in demand – it is designed to help men enjoy extended intimacy.



## Most flower orders

1. Zurich
2. Bern
3. Basel-Stadt

The '**Lovely**' bouquet by Fleurop is the most popular flower composition on Just Eat. Most flower orders are received between **11 am and 12 noon**.



## Most orders for spicy dishes

1. Schwyz
2. Schaffhausen
3. Zurich

Most of the spicy dishes at Just Eat are ordered through **Thai restaurants**.



## Most vegan orders

1. Basel-Stadt
2. Zug
3. Zurich

The favourites: **vegan papaya salad, vegan pad Thai and vegan sushi rolls with cucumber, avocado or mango**.



## Most grocery orders

1. Zug
2. Basel-Stadt
3. Zurich

The most popular product in Zug: **dark chocolate bars!**



## Most night-time orders

1. Basel-Stadt
2. Zurich
3. Geneva

Aside from beer, night owls mainly order **nachos, chocolate bars, ice cream and frozen pizza**. Most orders are received during the night from Saturday to Sunday until 3 am.



## Highest basket value

1. Schwyz
2. Zug
3. Valais



## These cantons give drivers the most tips

1. Appenzell Innerrhoden
2. Zug
3. Schwyz

100% of the tip is paid to the drivers. For partner companies that perform their own deliveries, the tip is shown separately and transferred at the end of the month along with the sales payment.

## And these are the most frugal cantons in terms of tips

1. Jura
2. Grisons
3. Neuchâtel



## The highest tips in 2025

CHF 62 in Bern  
CHF 52 in Zurich  
CHF 50 in Zug

## Our three most loyal customers are in...

**1** Basel  
590 orders

**2** a municipality in the canton of Aargau  
560 orders



**3** Lausanne  
520 orders



# In the spotlight: on-demand delivery

On-demand services are changing the way we shop, eat, travel and spend our free time. Products and services are no longer tied to fixed times or places, but are available precisely when we need them. Digital platforms and apps provide direct access to a wide range of services – from food and grocery deliveries to mobility, streaming, trade and fitness.

The on-demand trend is driven by modern consumers who value flexibility and speed, and by technologies that make



these needs possible. But despite the opportunities, on-demand models also come with challenges – from fierce competition and operational complexity to the ques-

tion of how such services will be received in different countries, including Switzerland.

We answer the five most important questions:

## 1. What does 'on-demand' mean?

On-demand essentially means 'on request'. In the economic context, the term refers to services and products that consumers receive precisely when they need them. Instead of fixed offers at specific times or places, on-demand enables flexible access to a variety of services via digital platforms and apps. These include deliv-



ery services (food, groceries, medicines, other goods), transport services (passenger transport, scooter or bicycle rental), streaming services (video, music, podcasts, audio books), household and trade services (cleaning, repairs, health, babysitting, dogsitting) and personal services (fitness classes, tutoring, counselling). The driving force behind this trend are consumers who live in a world of faster informa-

tion and communication. Supported by technological developments, the need for the constant and instant availability of services and products is growing.

## 2. Where does on-demand have its roots?

On-demand services have been around for a long time – even before the digital age. Early examples include milkmen delivering goods direct-



ly to people's homes or ordering services by telephone. Around the turn of the millennium, e-commerce pioneers such as Amazon made a wide range of products available online, and were followed by the first food ordering platforms. A key turning point came with the introduction of the iPhone and the App Store, which enabled consumers to access online services at all times. The roots of on-demand therefore lie in the combination of the growing need to be flexible and save time, and the technological advances that have made it possible to provide services quickly and flexibly in the first place. Just Eat is also part of this on-demand ecosystem and is increasingly contributing to meeting the need for immediate availability in everyday life.



### 3. In which European countries is on-demand well established?

In Europe, urban centres in England, Germany, the Netherlands and Spain have become key markets for on-demand services. London is considered a hotspot for ride-hailing and food delivery. In Germany, too, ride-hailing is becoming more important, complemented by on-demand mobility such as car-sharing and e-scooter services. As a start-up hub, Berlin attracts numerous innovative solutions. The Netherlands benefits from a high level of acceptance of digital servic-

es and a highly developed delivery infrastructure. In Spain, services are mainly concentrated in metropolises such as Barcelona and Madrid – particularly in the areas of mobility and food delivery. Despite different priorities and development dynamics, a clear pattern is emerging throughout Europe: on-demand services are becoming more important and are increasingly shaping consumers' lifestyles.

### 4. What are the challenges of on-demand?

On-demand delivery services for meals, groceries and everyday goods are already well established



in urban centres in Western and Northern Europe. Companies that offer fast delivery times and a seamless customer experience record strong growth. At the same time, challenges such as profitability, intense competition and operational complexity remain. Examples like Gorillas or Getir demonstrate how high costs, low margins and scaling problems can quickly lead to failure.

In contrast, established platforms such as Just Eat Takeaway.com benefit from existing infrastructure, brand awareness and trust. They offer consumers a wide selection of major and local providers under one digital umbrella.

For consumers, fast, reliable delivery is crucial: delivering within an hour is often essential, and keeping that promise is critical to success.

### 5. How is the on-demand market becoming established in Switzerland?

The Swiss market, known for its high quality of living and well-developed infrastructure, is still in its infancy when it comes to the on-demand sector. While online shops and delivery services already exist, ultra-fast deliveries within an hour are not yet available across the board. This is due to the high density of supermarkets, traditional shopping habits, a still restrictive store opening policy and logistical challenges posed by topography and decentralised settlement structures. At the same time, there are clear signs of growing interest: urbanisation, new working models and a young generation shaped by the digital world are changing consumer preferences and driving the appetite for on-demand services. Particularly in urban centres, demand for fast and flexible deliveries is set to continue rising in the coming years.



## Insights from the Just Eat Takeaway.com study 'Control, on-demand'

As part of a collaboration with PA Consulting, Just Eat Takeaway.com has published the study 'Control, on-demand' – The shift to rapid retail delivery', which provides in-depth insights into changing consumer behaviour.

Since the needs of people in a fast-paced world are not static, but constantly change depending on the time of day, phase of life and emotional situation, the study goes beyond traditional, rigid demographic categories. To better understand consumers, 'need spaces' were introduced in the results. Need spaces do not describe a specific person, but rather a specific state of mind or way of thinking. They capture the emotional and functional needs that are relevant at a particular moment – such as the desire to relax, save time or simply to cope with everyday life.

Twenty-five consumer priorities were analysed, leading to the identification of five key need spaces. Each one is aimed at the core emotional benefit of regaining control in hectic everyday life.

### Unleashing the true you

**The need to break free from social expectations and lead a spontaneous, authentic life.**

86% find it important to be able to express their true selves.

Two in three Speed Seekers use on-demand services to live more spontaneously.

Relevant for deliveries in the areas of pharmacy & health, beauty & wellness, hobbies & creativity, self-care & relaxation.



### The new fundamentals

**The need to protect personal peace and privacy by making the home a safe haven.**

84% crave private moments.

80% find comfort in their own home.

Relevant for deliveries in the areas of pharmacy & health, beauty & wellness, household & cleaning, food & beverages, self-care & relaxation.



### Unplugged connection

**Rejecting screen dependency and pursuing meaningful, real connections.**

81% say that small gestures help them to feel connected.

75% of Speed Seekers feel more present through on-demand services.

Relevant for deliveries in the areas of flowers & gifts, gadgets & electronics, food & beverages.

## The five central need spaces



### Raising the bar

**The ambition to invest in personal growth and learning new skills.**

81% consider personal growth important.

79% prioritise learning new skills.

Relevant for deliveries in the areas of books & education, electronics & gadgets, hobbies & creativity, music & instruments, sports equipment & fitness, wellness & relaxation.



### Reclaiming balance

**Actively searching for order and rhythm in hectic everyday life to reduce mental load.**

Three in five people feel like their lives are a constant juggling act.

73% of Speed Seekers gain a feeling of relief from on-demand offers.

Relevant for deliveries in the areas of pharmacy & health, baby care & children's supplies, office & organisation, household & cleaning, food & beverages, self-care & relaxation, pets & accessories.

**The study was based on the answers of what are known as 'Speed Seekers': these on-demand early adopters have ordered products with fast delivery at least once in the last six months. Their behaviour serves as an important indicator of how the general public's thinking and expectations of speed and convenience might evolve over time.**

## Conclusion

Today, consumers are increasingly shopping responsively and emotionally, influenced by their daily lives, current events and the pressure to reconcile ap-

pointments, work and private commitments. They want to make the most of their time and simplify their lives, with the feeling of being in control crucial to their well-being.

Being able to respond to these needs in real time – with speed, flexibility and ease of use – offers a clear advantage. The study shows that seamless and fast solutions for everyday decisions are not only practical but also provide emotional and psychological relief. Just Eat helps partners to be present in precisely these moments and to fulfil this need for consumers.

## On-demand at Just Eat around the world

The on-demand segment is expected to grow by 10% annually until 2030. It is no longer limited to food, but also includes electronics, baby care, pharmacy products, flowers, animal care and wellness.



It is estimated that **11% of the European population** will regularly use fast food delivery services by **2030**.

Just Eat sold **2.3 million health & beauty products** worldwide last year. One of the most popular categories is baby products: **500 packs of nappies are ordered through Just Eat every day.**



**Top sellers in the health & beauty sector:** painkillers, children's medicine, pregnancy tests, cold remedies.



More than **28,000 vitamin supplements** were sold this year, with boosters proving particularly popular. There were also **60,000 searches** for protein-based foods, granola bars and powders.

## On-demand at Just Eat Switzerland



**Winterthur** is the city where pet food is ordered most often via Just Eat. Throughout Switzerland, **cat food for healthy digestion** tops the list of best-sellers.



**Self-care bestseller: lubricant.** Since the start of the partnership with Magic X, most self-care orders have been received between **3 pm and 4 pm**.

# Contact information

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