

Fieldsman

The road towards a European outdoor
kitchen champion

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1 Introduction

The Fieldsman Story and Scaling Challenge

Fieldsman has a problem most startups would envy: it stops advertising every May, not because demand weakens, but because it cannot produce enough kitchens to meet it. This capstone addresses how to solve that constraint and scale the company into a European market leader.

1.1 Company Background: Three Brothers, One Gap in the Market

Fieldsman is a direct-to-consumer outdoor kitchen company founded by three brothers: Raymon Veldman, Jurrian Veldman, and Herald Veldman. The company designs and sells modular outdoor kitchens that enable customers to configure a personalized kitchen at a price point significantly more accessible than traditional premium brands.

Fieldsman's positioning addresses a clear gap in the market. At the low end, outdoor kitchens are often non-customizable and built with low-durability materials. At the high end, premium solutions cost between €10,000 and €50,000, out of reach for most households. In between lies the "Missing Middle": customers who want premium design and durability but will not pay luxury prices. Fieldsman targets this gap with high-quality materials, modular customization, and strong design aesthetics at a mid-premium price, enabled by a direct-to-consumer model and controlled product complexity.

The company is currently operated part-time alongside the founders' professional activities, supported by approximately 3–5 part-time employees. Despite this setup, Fieldsman has demonstrated clear market traction: approximately 50 kitchens per year, generating around €200K in revenue and €80K in profit, on less than €5,000 in advertising spend. These results indicate strong product-market fit and a margin structure that can fund growth.

However, growth is constrained not by demand but by operational capacity. Fieldsman reduces marketing activity and stops advertising around May, even though demand continues to peak later in the season. This protects lead times and quality, but it also leaves significant revenue on the table.

1.2 The Scaling Dilemma: Demand Exceeds Capacity

The European outdoor living market is expanding. Consumers increasingly invest in gardens, patios, and outdoor social spaces. Kamado cooking culture is growing beyond the Netherlands into Belgium and Germany, supporting a broader shift toward outdoor cooking as a lifestyle. These trends create a favorable window for a scalable, mid-premium outdoor kitchen brand.

Fieldsman's target customers are typically upper-middle-class households aged 30–60 who value hosting and social gatherings. Customer feedback consistently highlights the emotional value of the product, the "wow effect" and pride of ownership, as a major purchase driver.

At the same time, willingness to pay differs from indoor kitchens. Customers view outdoor kitchens as complementary purchases, not primary investments. They accept trade-offs: fewer built-in features, self-installation, lower service levels, provided the product delivers strong design, quality, and customization at a fair price. This trade-off logic is central to Fieldsman's positioning and explains why a well-designed mid-premium proposition can scale.

The strategic challenge is clear: scale Fieldsman into a national leader and international challenger while preserving brand equity and operational control. This requires overcoming two bottlenecks. First, steel frame production limits capacity. Second, ceramic countertops, currently outsourced, cost approximately €900 per kitchen with lead times of 8 weeks. Together, these constraints cap annual production and prevent sustained marketing investment.

1.3 Strategic Question and Objectives

This capstone addresses a single strategic question:

What go-to-market and production model will allow Fieldsman to scale nationally and expand internationally within five years, while preserving its brand equity and operational control?

To answer this question, the report pursues four objectives:

- Assess the market opportunity for a mid-premium outdoor kitchen proposition in the Netherlands, Belgium, and Germany.
- Clarify Fieldsman's competitive positioning and the customer value

drivers that differentiate it from low-end and high-end competitors.

- Evaluate strategic options for scaling and select the most viable approach.
- Translate the chosen strategy into an action plan with milestones, KPIs, risks, and funding requirements.

1.4 Scope and Structure

This capstone focuses on the period 2026–2030. The Netherlands is the base market for accelerated scaling; Germany and Belgium are priority markets for international expansion from 2027.

The report is structured as follows:

- **Chapter 2** analyzes the external environment: market dynamics, customer behavior, competition, and key success factors.
- **Chapter 3** assesses Fieldsman's internal capabilities and constraints.
- **Chapter 4** presents strategic options and the decision rationale.
- **Chapter 5** outlines the required transformations and implementation roadmap.
- **Chapter 6** details the action plan with milestones and KPIs.
- **Chapter 7** presents financial and extra-financial impact.
- **Chapter 8** covers risks and sensitivity analysis.
- **Chapter 9** concludes with the recommended path and immediate next steps.

2 **External Analysis**

A €315M Opportunity Without a Scaled Leader

This chapter evaluates whether Fieldsman's ambition to scale nationally and expand internationally within five years is supported by the external market environment. It quantifies the market opportunity in the Netherlands, Belgium, and Germany, analyzes structural demand drivers, and assesses customer needs, competitive dynamics, and industry attractiveness.

2.1 Market Definition: The Mid-Premium Outdoor Kitchen Segment

The outdoor kitchen market comprises modular or built-in outdoor cooking and preparation units intended for permanent or semi-permanent placement in residential outdoor spaces. These solutions typically integrate cooking appliances such as kamado grills, gas grills, and pizza ovens, along with preparation space, storage modules, and optional utilities.

Fieldsman competes in the mid-premium segment, where customers expect high-quality design and durability but are unwilling to pay luxury price points. This segment spans approximately €2,000 to €10,000 depending on configuration. The market excludes portable grills and BBQ carts at mass retail prices, high-end landscaping projects exceeding €50,000, and indoor kitchen products not designed for outdoor durability.

The geographic scope covers three markets. The Netherlands serves as the base market, with Belgium and Germany as priority expansion targets. Home ownership rates in the Netherlands and Belgium (70–77%) support high garden access and installation permission. Germany's lower home ownership rate (51%) creates a larger rental segment where modular portability becomes an important buying driver.

2.2 A €315M Opportunity Across Three Markets



Using a bottom-up household adoption model, the Total Addressable Market across the Netherlands, Belgium, and Germany reaches €315M annually, representing approximately 79,000 units. Germany dominates with €251M of the total, making it the anchor market for any European scaling ambition. The Netherlands contributes €40M and Belgium €24M.

The Serviceable Addressable Market, representing mid-premium modular outdoor kitchens in the €2K–€10K range, accounts for 35% of TAM, or €110M. This is Fieldsman's

competitive arena: the "Missing Middle" where customers want premium quality without luxury prices.

The Serviceable Obtainable Market by 2030 represents what a single scalable challenger can realistically capture. With target shares of 5–10% in the Netherlands, 3–7% in Belgium, and 2–5% in Germany, this translates to €2.7–6.4M in revenue and 550–1,270 kitchens per year. These volumes align with Fieldsman's production capacity ambition and confirm that Germany is essential for European-scale outcomes.

2.3 Four Tailwinds Driving Demand

Four structural trends support category growth and strengthen the scaling thesis:

1. Outdoor living as an extension of the home

Households increasingly invest in gardens and terraces as "second living rooms." Outdoor kitchens combine functional, aesthetic, and social value, making them attractive lifestyle purchases beyond pure cooking utility. The COVID-19 pandemic accelerated this trend, and consumer behavior has not reverted.

2. Premiumization and kamado culture

Kamado grills represent approximately 5–10% of barbecue ownership across NL/BE/DE, corresponding to approximately 0.3–0.5M Dutch households, 0.2–0.3M Belgian households, and ~2.0M German households. Kamado category growth is estimated at 5–8% annually, faster than the broader European BBQ market at 4–5%. Kamado owners are a natural feeder segment for outdoor kitchen purchases: they have already invested in premium outdoor cooking and seek a proper setting for their equipment.

3. Experience-driven consumption

Outdoor kitchens function as social infrastructure. For many households, the purchase is motivated by hosting, lifestyle pride, and status signaling. Customer feedback consistently highlights the "wow effect" and pride of ownership as central to perceived value. This emotional dimension supports premium pricing and brand differentiation.

4. A polarized market structure

The market is polarized between low-budget DIY solutions and premium bespoke kitchens priced at €15,000–€50,000+. This price gap, the "Missing Middle," creates a structural opportunity for mid-premium brands offering high-quality design and durability at accessible pricing. Customers in this segment are underserved: they want more than cheap carts but cannot justify luxury prices for seasonal use.

2.4 What Customers Want: Design, Durability, and the "Wow Effect"

Fieldsman's core customer is "The Proud Host": aged 35–60, upper-middle income but value-conscious, owning a home with garden or terrace, typically a family or hosting-centric couple. Their budget sits in the €3K–€8K mid-premium comfort zone. They want something premium, but not a crazy luxury spend. Their job-to-be-done is clear: create a garden centerpiece that makes hosting effortless and earns compliments.

Outdoor kitchen buyers seek three value dimensions. Functional durability ensures products withstand outdoor weather for years. Aesthetic integration makes the kitchen a central design element in the garden. Emotional value delivers hosting satisfaction, pride of ownership, and lifestyle identity.

Willingness to pay is constrained by comparison to indoor kitchens. For most households, an outdoor kitchen is discretionary and cannot justify the same investment as an indoor renovation. Customers mentally anchor to their indoor kitchen price and apply a discount for lower usage frequency. The key objection is always: "Outdoor kitchens are used less, is this worth it?" The answer lies in reassurance via durability, long lifespan, and pride of ownership. This creates a natural ceiling:

most buyers will not exceed €3,000–€8,000 unless they belong to the true luxury segment.

Customers accept trade-offs if design and durability remain strong. Reduced built-ins, self-installation, fewer drawers, and lower-touch service are acceptable. Strong design, quality materials, and customization at a fair price are not negotiable. This trade-off logic aligns directly with Fieldsman's proposition: deliver what matters, eliminate what does not, and pass the savings to the customer.

The customer journey is digital-first but requires reassurance. The Proud Host discovers brands through Instagram, Pinterest, search, and lifestyle content. They use visualization tools like configurators. But for purchases in the €3,000–€8,000 range, they seek showroom reassurance before committing to a €5K+ online purchase. Pains include uncertainty about durability ("How will it look after 2 winters?"), trust concerns ("Can I trust €5K+ online?"), and access barriers ("Showrooms are too far"). Scaling requires a "phygital" model: digital acquisition combined with trust-building through content, reviews, influencers, and cost-efficient showroom access.

"The Proud Host" (Mid-Premium Upgrader)
"I want something premium, but not a crazy luxury spend."

€3K – €8K
MID-PREMIUM COMFORT ZONE

AGE	INCOME	HOME	LIFE STAGE
35–60	Upper-middle (value-conscious)	Owned + garden	Family / hosting couple

JOB-TO-BE-DONE: Create a garden centerpiece that makes hosting effortless and earns compliments.

THINKS & FEELS <ul style="list-style-type: none">— Hosting satisfaction— Pride of ownership— Lifestyle identity— Can we justify this for just the summer months?	SEES <ul style="list-style-type: none">— Instagram/Pinterest setups— Friends' outdoor kitchens— Influencer content— Premium brands online
HEARS <ul style="list-style-type: none">— Online reviews & influencers— "Make sure it handles weather"— Friends impressed by outdoor setups	SAYS & DOES <ul style="list-style-type: none">— Discovers via social, search, lifestyle content— Uses digital visualization tools— Seeks showroom reassurance

TRIGGERS

- Garden renovation
- Kamado purchase
- Friend's setup
- Hosting event

PAINS

- How will it look after 2 winters?
- Can I trust €5K+ online?
- Showrooms are far

GAINS

- Strong design
- Quality materials
- Customization
- Fair price
- Garden centerpiece

KEY OBJECTION: "Outdoor kitchens are used less than indoor kitchens — is this worth it?" → Reassure via durability, long lifespan, pride-of-ownership.

VALUE DIMENSIONS
Durability • Aesthetics • Emotion

ACCEPTS TRADE-OFFS FOR DESIGN + DURABILITY + FAIR PRICE
Reduced built-ins • Self-install • Fewer drawers • Lower-touch service

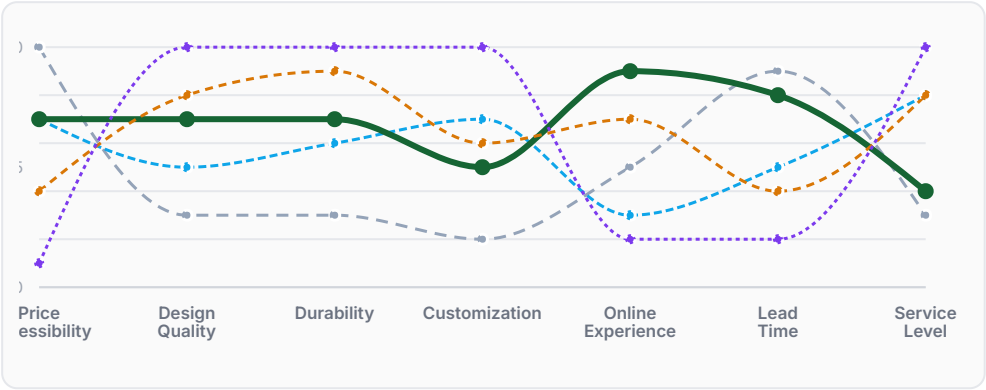
2.5 A Fragmented Market Without a Scaled Leader

The competitive landscape is fragmented and structurally polarized into five segments spanning from low budget to luxury. This polarization creates a clear gap, the "Missing Middle", where Fieldsman's modular strategy delivers unique value by combining premium quality with operational efficiency.

Strategy Canvas: Value Curve Analysis

Dutch Outdoor Kitchen Market Positioning vs. Key Segments

Low BudgetMid-PremiumFieldsmanPremiumLuxury



SEGMENT	PRICE RANGE	REPRESENTATIVE BRANDS
Low Budget	€0 – €2K	IKEA, Buitenkeukendeal, Weber, Boretti, DIY
Mid-Premium	€3K – €8K	MetaalEnzo, regional craftsmen, small workshops
Fieldsman	€3K – €8K	Fieldsman
Premium	€10K – €20K	Roostr, Novara, Life-Steel, Freiluft, OFYR, Otto Wilde, Flammkraft
Luxury	€25K+	COOXs Concepts, Röshults, Anker

STRATEGIC POSITIONING ANALYSIS

Fieldsman occupies the **"Missing Middle"** by replacing manual craftsmanship with mass-customization. This allows for high-end design and durability consistency while maintaining an accessible €3K–€8K price point—avoiding the high overhead of luxury showroom models while heavily outperforming budget mass-retailers on quality.

CUSTOMIZATION: Curated modules, not bespoke	PRODUCT RANGE: High-impact core sets
SHOWROOMS: Scaled digital-first coverage	DELIVERY: Standardized self-installation

The low budget segment (€0–€2K) includes IKEA, Buitenkeukendeal, Weber, Boretti, and DIY solutions. These players score high on price accessibility but low on design quality, durability, and customization. They anchor customer reference pricing but are not direct competitors to Fieldsman.

The mid-premium segment (€3K–€8K) consists of players like MetaalEnzo, regional craftsmen, and small workshops. These players offer design focus and quality materials but suffer from limited production capacity, inconsistent online experience, and longer lead times due to manual production. This is Fieldsman's competitive arena.

The premium segment (€10K–€20K) includes established brands such as Roostr, Novara, Life-Steel, Freiluft, OFYR, Otto Wilde, and Flammkraft. They deliver high design quality and durability but operate showroom-heavy models with higher prices and longer lead times.

The luxury segment (€25K+) features players like COOXs Concepts, Röshults, and Anker. They offer fully bespoke designs and high-touch consultancy but serve a limited addressable market with extended lead times and premium pricing.

Strategic Differentiation

Fieldsman's value curve is built on a deliberate strategic choice to compete in the €3K–€8K segment by replacing traditional bespoke craftsmanship with mass-customization through standardized modules. This modular architecture allows Fieldsman to deliver higher design consistency, reliable durability, a superior online configuration and purchase experience, and significantly faster lead times than mid-premium workshops.

The competitive implication is clear: the mid-premium segment is growing but lacks a dominant scalable European player. Competition is driven by design differentiation, brand trust, and lead-time reliability, not price alone. This creates an opportunity for Fieldsman to become the category leader by scaling operational excellence.

2.6 Industry Attractiveness: Room for a Challenger

Porter's Five Forces analysis indicates that the outdoor kitchen industry is attractive for a challenger that can combine modular design with operational control.



3 **Internal Analysis**

A Strong Foundation Constrained by Capacity

This chapter evaluates whether Fieldsman has the internal capabilities and resources required to execute its growth ambition. It analyzes the current business model, product architecture, capabilities, operational constraints, and the elements of brand equity that must be preserved. The objective is to identify what Fieldsman can leverage, what must be transformed, and what execution risks must be managed.

3.1 The D2C Model: High Margins, Limited Capacity

Fieldsman operates as a direct-to-consumer brand. Customers configure their outdoor kitchen online via a proprietary 3D configurator, after which the kitchen is produced and delivered directly. This model avoids retail margins and maintains strong profitability while offering accessible pricing relative to premium competitors.

CURRENT PERFORMANCE SNAPSHOT



The company sells approximately 50 kitchens per year with remarkable efficiency. Marketing investment is less than €5,000 annually. This implies a customer acquisition cost under €100 and a return on ad spend exceeding 40x. The demand is clearly there. The constraint has never been commercial; it has always been operational.

Pricing Architecture

The D2C model supports a modular pricing ladder that captures customers at multiple entry points without changing the core production logic.

ENTRY

€2,000+

2 modules. Targets price-sensitive first-time buyers.

CORE

€3k – €5k

4–6 modules. Primary mid-premium target segment.

PREMIUM

€6k – €10k

8+ modules. Design-driven, full outdoor kitchen.

3.2 Modular Architecture: Customization Without Complexity

Fieldsman's core strategic asset is its modular product architecture. The outdoor kitchen is built from standardized modules that can be combined and expanded, allowing customers to design configurations that fit their space and preferences while enabling scalable production.

The Module System:

- **Compact Module (49.5 cm):** Storage and compact setups.
- **Ruim Module (63 cm):** Primary workspace building block.
- **Kamado Module (68 cm):** Anchors most configurations.

- **Corner Module (80 cm):** Enables L-shaped layouts.

Customization options include panel materials (steel or composite in teak, oak, or graphite finishes), steel colors (black or white), and ceramic countertops. This design creates perceived personalization while limiting complexity.

The Scaling Rationale: Modularity is the foundation of mass customization. A stable module set allows Fieldsman to optimize cutting patterns, standardize assembly, and scale to 1,000–5,000 kitchens per year without redesigning the product. This solves the "mid-premium dilemma": offering customization without the unscalable costs of bespoke craftsmanship.

MODULAR PRODUCT ARCHITECTURE

Four standardized modules combine to create customized configurations while enabling scalable production

CORE MODULES



Compact

50 × 80 × 92 cm

from €900



Large

63 × 80 × 92 cm

from €1,075



Kamado

68 × 80 × 92 cm

from €1,175



Corner

80 × 80 × 92 cm

from €1,050

CONFIGURATION EXAMPLES

Linear — 3 modules



Extended — 4 modules



L-Shape — 5 modules



FRAME COLOURS



Pebble Grey



Timeless Taupe



Black

ADD-ONS



Fridge



Sink



Shelves



Drawers



Kamado

COUNTERTOPS



Calagatta Gold



Laurent Gold



Concrete Graphite



Concrete Light Grey



Statutario



Limestone Ivory



Fior di Bosco

DELIVERY & ASSEMBLY



Standard Delivery



Premium Delivery



DIY Assembly

Mass customization through modular architecture — personalization without production complexity

The Modularity Moat

VS REGIONAL CRAFTSMEN

Regional craftsmen offer unlimited bespoke options but cannot scale. Their costs are tied to manual labor and one-off designs. Fieldsman delivers the **"Wow Effect"** at scale.

VS MASS RETAILERS

Mass retailers offer standardization but no personalization. Their products are generic. Fieldsman offers **high-end aesthetic control** while maintaining retail-like operational efficiency.

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3.3 What Fieldsman Can Leverage (VRIO Analysis)

A VRIO assessment indicates that Fieldsman's advantage is not based on a single patented technology, but on the combination of design, modular architecture, and D2C execution.

CAPABILITY / RESOURCE	V	R	I	O	COMPETITIVE IMPLICATION
Modular Product Architecture	✓	✓	✓	✓	Sustained Advantage: Enables scalability + high-end customization.
D2C Model + Configurator	✓	✓	○	✓	Temporary Advantage: Rare in industry but imitable over time.
Brand Value (Design/Quality)	✓	○	○	○	Competitive Parity: Differentiated but not yet defensible.
Founder Expertise	✓	✓	✓	✗	Competitive Disadvantage: Valuable but single-point dependency risk.

Strategic Conclusion:

Fieldsman has a credible capability base for scaling. The key limitation is that the organization is not yet structured to convert these strengths into repeatable high-volume execution. Scaling requires moving from "Founder-Logic" to "System-Logic."

3.4 The Bottleneck: Why Growth Stops in May

Fieldsman's growth is constrained by production capacity, not demand. During peak season, the company deliberately reduces or stops advertising because production cannot keep up with incoming orders. This results in an artificial cap on growth: throughput is limited by the current production system.

BOTTLENECK 1

Steel Frame Production

Currently performed in-house and constrained by skilled labor dependency, manual processes requiring founder involvement, and fixed capacity. Hiring skilled labor year-round leads to unused capacity outside peak season, creating payroll risk.

- Manual welding & cutting limits speed.
- Founder-dependent quality control.
- No buffer for demand spikes.

BOTTLENECK 2

Ceramic Countertops

Currently outsourced to local suppliers at ~€900 per kitchen with lead times of ~8 weeks. The supplier market underperforms on three dimensions: cost, lead time, and reliability. Countertop delays directly delay shipment of the entire kitchen.

COST
€900

LEAD TIME
8 WEEKS

Implication: To scale from 50 to 5,000 kitchens per year, Fieldsman must transform its production system. The goal is to move from fixed manual labor to a scalable hybrid model: outsourced steel (flexibility) and in-house robotic countertop cutting (cost & speed control).

3.5 What Must Be Preserved: Brand Equity & Control

Scaling is useless if it destroys the very attributes that drive the premium positioning. Two critical strategic assets must be guarded during the transition to a high-volume model.

Brand Equity Assets

DESIGN CONSISTENCY

The high-end aesthetic must be maintained regardless of production volume. No compromise on finishing or material quality.

DURABILITY PROMISE

10+ year lifespan in outdoor environments is non-negotiable. Material choices (Steel/Ceramic) are core to trust.

THE "WOW EFFECT"

The pride of ownership that motivates upper-middle-class buyers. The kitchen must remain a garden centerpiece.

Operational Control Assets

D2C MARGIN STRUCTURE

Avoid retail intermediaries that extract 30–40% margin. Maintaining this power allows for premium quality at accessible prices.

CUSTOMER DATA OWNERSHIP

Direct access to behavior and feedback loops. Essential for iterating the 3D configurator and product modules.

PRICE-QUALITY RATIO

The "Missing Middle" positioning. Scaling must reduce COGS, not increase retail markups.

3.6 SWOT Synthesis

<p>STRENGTHS</p> <ul style="list-style-type: none">• Modular product architecture (mass customization).• Proprietary 3D configurator (sales efficiency).• High D2C margins (~40% net).• Exceptional ROSA (40x+) / Low CAC.	<p>WEAKNESSES</p> <ul style="list-style-type: none">• Operational throughput capped at ~50 units/yr.• Manual, founder-dependent production.• High ceramic countertop costs (€900).• Long lead times (8 weeks).
<p>OPPORTUNITIES</p> <ul style="list-style-type: none">• Robotization/Waterjet cutting for countertops.• Outsourcing steel to scalable manufacturers.• Geographic expansion (DE/BE).• Commercial scaling via professional marketing.	<p>THREATS</p> <ul style="list-style-type: none">• Supply chain disruption (import risks).• Margin dilution if retail channels are entered.• Service level failure as volume increases.• New scalable entrants in the "Missing Middle".

3.7 Key Internal Takeaways

Fieldsman has proven product-market fit: Demand is massive but currently constrained by internal throughput, not market interest.

Scaling requires a fundamental shift: from founder-intensive manual production to a high-capacity hybrid model.

The modular architecture is the key to decoupling customization from complexity—a core requirement for international scaling.

The direct-to-consumer margin (~40%) is the company's financial fuel. It must be protected from retail margin erosion.

4 **Strategic Options**

Three Paths Forward, One Clear Winner

4.1 Three Paths Forward

Option 1: Brand-Led Scale-Up

Scale a repeatable D2C model organically across NL → BE → DE, transforming production supply chain (hybrid outsourcing) and building a professional marketing engine.

Option 2: European Roll-Up

Acquire local outdoor kitchen manufacturers and consolidate them under the Fieldsman brand to gain immediate capacity.

Option 3: Federated Expansion

Expand through joint ventures or master franchise partners who operate local markets and handle their own production/sales.

Each option offers a different balance of speed, control, capital intensity, and risk. They were evaluated through Suitability, Feasibility, and Acceptability (SFA) criteria.

4.2 Option Evaluation & 4.3 Decision

Use-Case: Why Option 1 Wins

Option 1: Brand-Led Scale-Up directly addresses Fieldsman's core constraint: capacity limits growth, not demand.

The hybrid production model (outsourced steel frames, in-house countertop cutting) unlocks scale while preserving quality control. AI-enabled commercial operations drive growth without proportional headcount. The phygital D2C model maintains margin advantage. Geographic expansion follows operational readiness: Netherlands (2026), Belgium and Germany from (2027).

Why not Option 2 (Roll-Up)?

Fieldsman lacks the organizational depth to harmonize multiple production systems and cultures simultaneously. Inconsistent quality would damage the brand. This path fits better post-2030.

Why not Option 3 (Federated)?

Fundamentally compromises the value creation model. When partners control the customer experience, brand consistency suffers. Fieldsman would lose the direct "learning loops" essential for optimization.