



Euromonitor
International

Consumer Foodservice in Poland

April 2026

Table of Contents

Consumer Foodservice in Poland

EXECUTIVE SUMMARY

Market continues to expand at a robust pace

KEY DATA FINDINGS

INDUSTRY PERFORMANCE

Rates of growth in value sales, transactions and outlet numbers slow moderately
Menu innovation, customer experiences and fulfilment are key points of competition
Investment in and engagement with loyalty programmes remain high

WHAT'S NEXT?

Outlook for consumer foodservice is broadly favourable
Digitalisation and automation set to become more visible across the market
Sustainability concerns will continue to shape company strategies

COMPETITIVE LANDSCAPE

McDonald's maintains market lead in value sales terms
Rex Concepts is the most dynamic performer overall
AmRest expands Starbucks chain into smaller cities

CHANNELS

Independents continue to dominate consumer foodservice in Poland
Adoption of digital tools is strongest among chains

MARKET DATA

- Table 1 - Units, Transactions and Value Sales in Consumer Foodservice 2020-2025
- Table 2 - Units, Transactions and Value Sales in Consumer Foodservice: % Growth 2020-2025
- Table 3 - Consumer Foodservice by Independent vs Chained by Type: Units/Outlets 2025
- Table 4 - Consumer Foodservice by Independent vs Chained: % Foodservice Value 2020-2025
- Table 5 - Sales in Consumer Foodservice by Food vs Drink Split: % Foodservice Value 2020-2025
- Table 6 - Sales in Consumer Foodservice by Food vs Drink Split by Type: % Foodservice Value 2025
- Table 7 - Sales in Consumer Foodservice by Location: % Foodservice Value 2020-2025
- Table 8 - Sales in Consumer Foodservice by Fulfillment: % Foodservice Value 2020-2025
- Table 9 - GBO Company Shares in Chained Consumer Foodservice: % Foodservice Value 2021-2025
- Table 10 - GBN Brand Shares in Chained Consumer Foodservice: % Foodservice Value 2022-2025
- Table 11 - GBN Brand Shares in Chained Consumer Foodservice: Units/Outlets 2025
- Table 12 - Forecast Units, Transactions and Value Sales in Consumer Foodservice 2025-2030
- Table 13 - Forecast Units, Transactions and Value Sales in Consumer Foodservice: % Growth 2025-2030

DISCLAIMER

SOURCES

Summary 1 - Research Sources

Cafés/Bars in Poland

KEY DATA FINDINGS

2025 DEVELOPMENTS

Growth in current value sales and transactions slows as outlet numbers decline

INDUSTRY PERFORMANCE

Independent bars/pubs continue to face significant challenges

Specialist coffee and tea shops is the most dynamic performer in value growth terms
Operators seek to justify price hikes by enhancing in-store experiences

WHAT'S NEXT?

Changing consumer habits will drive more independent bars/pubs out of business
Efforts to improve customer experiences set to intensify
Sustainability and health concerns will continue to influence competitive strategies

COMPETITIVE LANDSCAPE

McDonald's Polska remains the overall leader in 2025
WBC Olechno Zalewski Kalicinski Sp J posts highest value growth rate
Cafés/bars still mainly represented by independent operators

CATEGORY DATA

Table 14 - Cafés/Bars by Category: Units/Outlets 2020-2025
Table 15 - Sales in Cafés/Bars by Category: Number of Transactions 2020-2025
Table 16 - Sales in Cafés/Bars by Category: Foodservice Value 2020-2025
Table 17 - Cafés/Bars by Category: % Units/Outlets Growth 2020-2025
Table 18 - Sales in Cafés/Bars by Category: % Transaction Growth 2020-2025
Table 19 - Sales in Cafés/Bars by Category: % Foodservice Value Growth 2020-2025
Table 20 - GBO Company Shares in Chained Cafés/Bars: % Foodservice Value 2021-2025
Table 21 - GBN Brand Shares in Chained Cafés/Bars: % Foodservice Value 2022-2025
Table 22 - Forecast Cafés/Bars by Category: Units/Outlets 2025-2030
Table 23 - Forecast Sales in Cafés/Bars by Category: Number of Transactions 2025-2030
Table 24 - Forecast Sales in Cafés/Bars by Category: Foodservice Value 2025-2030
Table 25 - Forecast Cafés/Bars by Category: % Units/Outlets Growth 2025-2030
Table 26 - Forecast Sales in Cafés/Bars by Category: % Transaction Growth 2025-2030
Table 27 - Forecast Sales in Cafés/Bars by Category: % Foodservice Value Growth 2025-2030

DISCLAIMER

[Full-Service Restaurants in Poland](#)

KEY DATA FINDINGS

2025 DEVELOPMENTS

Current value sales, transactions and outlet numbers continue to increase steadily

INDUSTRY PERFORMANCE

Rising disposable incomes and growth in inbound tourism bolster trade
Chained Asian full-service restaurants posts fastest current value growth rate
Use of discount promotions remains widespread

WHAT'S NEXT?

Maturity and threat from cheaper categories will temper growth prospects
Investment in digitalisation and automation set to rise
Operators will continue working to reduce their environmental footprint

COMPETITIVE LANDSCAPE

AmRest remains the top company
Gastronom shows fastest growth in current value sales
Independents continue to dominate full-service restaurants

CATEGORY DATA

Table 28 - Full-Service Restaurants by Category: Units/Outlets 2020-2025

Table 29 - Sales in Full-Service Restaurants by Category: Number of Transactions 2020-2025
Table 30 - Sales in Full-Service Restaurants by Category: Foodservice Value 2020-2025
Table 31 - Full-Service Restaurants by Category: % Units/Outlets Growth 2020-2025
Table 32 - Sales in Full-Service Restaurants by Category: % Transaction Growth 2020-2025
Table 33 - Sales in Full-Service Restaurants by Category: % Foodservice Value Growth 2020-2025
Table 34 - GBO Company Shares in Chained Full-Service Restaurants: % Foodservice Value 2021-2025
Table 35 - GBN Brand Shares in Chained Full-Service Restaurants: % Foodservice Value 2022-2025
Table 36 - Forecast Full-Service Restaurants by Category: Units/Outlets 2025-2030
Table 37 - Forecast Sales in Full-Service Restaurants by Category: Number of Transactions 2025-2030
Table 38 - Forecast Sales in Full-Service Restaurants by Category: Foodservice Value 2025-2030
Table 39 - Forecast Full-Service Restaurants by Category: % Units/Outlets Growth 2025-2030
Table 40 - Forecast Sales in Full-Service Restaurants by Category: % Transaction Growth 2025-2030
Table 41 - Forecast Sales in Full-Service Restaurants by Category: % Foodservice Value Growth 2025-2030

DISCLAIMER

Limited-Service Restaurants in Poland

KEY DATA FINDINGS

2025 DEVELOPMENTS

Growth in current value sales, transactions and outlet numbers remains robust

INDUSTRY PERFORMANCE

Chains continue outperform independents

Middle Eastern limited-service restaurants posts highest current value growth

Faster order fulfillment remains a key battleground

WHAT'S NEXT?

Outlook for limited-service restaurants is bright

Digitalisation trend will continue to gain momentum

Sustainability credentials set to become a more important point of competition

COMPETITIVE LANDSCAPE

McDonald's Polska retains commanding overall lead in value sales terms

Rex Concepts PLK is the most dynamic performer

Differentiation strategies help independents weather challenging trading conditions

CATEGORY DATA

Table 42 - Limited-Service Restaurants by Category: Units/Outlets 2020-2025
Table 43 - Sales in Limited-Service Restaurants by Category: Number of Transactions 2020-2025
Table 44 - Sales in Limited-Service Restaurants by Category: Foodservice Value 2020-2025
Table 45 - Limited-Service Restaurants by Category: % Units/Outlets Growth 2020-2025
Table 46 - Sales in Limited-Service Restaurants by Category: % Transaction Growth 2020-2025
Table 47 - Sales in Limited-Service Restaurants by Category: % Foodservice Value Growth 2020-2025
Table 48 - GBO Company Shares in Chained Limited-Service Restaurants: % Foodservice Value 2021-2025
Table 49 - GBN Brand Shares in Chained Limited-Service Restaurants: % Foodservice Value 2022-2025
Table 50 - Forecast Limited-Service Restaurants by Category: Units/Outlets 2025-2030
Table 51 - Forecast Sales in Limited-Service Restaurants by Category: Number of Transactions 2025-2030
Table 52 - Forecast Sales in Limited-Service Restaurants by Category: Foodservice Value 2025-2030
Table 53 - Forecast Limited-Service Restaurants by Category: % Units/Outlets Growth 2025-2030
Table 54 - Forecast Sales in Limited-Service Restaurants by Category: % Transaction Growth 2025-2030
Table 55 - Forecast Sales in Limited-Service Restaurants by Category: % Foodservice Value Growth 2025-2030

DISCLAIMER

Self-Service Cafeterias in Poland

KEY DATA FINDINGS

2025 DEVELOPMENTS

Growth in current value sales and transactions picks up in 2025

INDUSTRY PERFORMANCE

Frequent promotions help to strengthen loyalty among core target demographics

Chained category registers strongest growth in current value terms

Digitalisation remains underdeveloped in self-service cafeterias

WHAT'S NEXT?

Trade set to remain reasonably steady

Operators will continue working to enhance menus and customer experiences

Efforts to improve sustainability credentials likely to intensify

COMPETITIVE LANDSCAPE

Ikea Retail Sp zoo strengthens its leadership

Salad Story is the best performing player

Independent operators remain dominant

CATEGORY DATA

Table 56 - Self-Service Cafeterias: Units/Outlets 2020-2025

Table 57 - Sales in Self-Service Cafeterias: Number of Transactions 2020-2025

Table 58 - Sales in Self-Service Cafeterias: Foodservice Value 2020-2025

Table 59 - Sales in Self-Service Cafeterias: % Units/Outlets Growth 2020-2025

Table 60 - Sales in Self-Service Cafeterias: % Transaction Growth 2020-2025

Table 61 - Sales in Self-Service Cafeterias: % Foodservice Value Growth 2020-2025

Table 62 - GBO Company Shares in Chained Self-Service Cafeterias: % Foodservice Value 2021-2025

Table 63 - GBN Brand Shares in Chained Self-Service Cafeterias: % Foodservice Value 2022-2025

Table 64 - Forecast Self-Service Cafeterias: Units/Outlets 2025-2030

Table 65 - Forecast Sales in Self-Service Cafeterias: Number of Transactions 2025-2030

Table 66 - Forecast Sales in Self-Service Cafeterias: Foodservice Value 2025-2030

Table 67 - Forecast Self-Service Cafeterias: % Units/Outlets Growth 2025-2030

Table 68 - Forecast Sales in Self-Service Cafeterias: % Transaction Growth 2025-2030

Table 69 - Forecast Sales in Self-Service Cafeterias: % Foodservice Value Growth 2025-2030

DISCLAIMER

Street Stalls/Kiosks in Poland

KEY DATA FINDINGS

2025 DEVELOPMENTS

Competitive prices and convenience factor remain key demand drivers

INDUSTRY PERFORMANCE

Menu diversification helps to maintain strong interest among consumers

Independent category grows fastest in value terms

Operators pursue a range of strategies to mitigate cost pressures

WHAT'S NEXT?

Innovation and improvements in quality standards will continue to boost trade
Investment in delivery services and digital tools expected to increase
Sustainability concerns set to become more influential

COMPETITIVE LANDSCAPE

Sweet Gallery extends its overall lead
Dolci Saporì remains the most dynamic performer in value growth terms
Independents continue to dominate but face mounting challenges

CATEGORY DATA

Table 70 - Street Stalls/Kiosks: Units/Outlets 2020-2025
Table 71 - Sales in Street Stalls/Kiosks: Number of Transactions 2020-2025
Table 72 - Sales in Street Stalls/Kiosks: Foodservice Value 2020-2025
Table 73 - Street Stalls/Kiosks: % Units/Outlets Growth 2020-2025
Table 74 - Sales in Street Stalls/Kiosks: % Transaction Growth 2020-2025
Table 75 - Sales in Street Stalls/Kiosks: % Foodservice Value Growth 2020-2025
Table 76 - GBO Company Shares in Chained Street Stalls/Kiosks: % Foodservice Value 2021-2025
Table 77 - GBN Brand Shares in Chained Street Stalls/Kiosks: % Foodservice Value 2022-2025
Table 78 - Forecast Street Stalls/Kiosks: Units/Outlets 2025-2030
Table 79 - Forecast Sales in Street Stalls/Kiosks: Number of Transactions 2025-2030
Table 80 - Forecast Sales in Street Stalls/Kiosks: Foodservice Value 2025-2030
Table 81 - Forecast Street Stalls/Kiosks: % Units/Outlets Growth 2025-2030
Table 82 - Forecast Sales in Street Stalls/Kiosks: % Transaction Growth 2025-2030
Table 83 - Forecast Sales in Street Stalls/Kiosks: % Foodservice Value Growth 2025-2030

DISCLAIMER

[Consumer Foodservice By Location in Poland](#)

KEY DATA FINDINGS

2025 DEVELOPMENTS

Supply of available locations improves but rental costs remain elevated

INDUSTRY PERFORMANCE

Travel and retail categories are the strongest performers in value growth terms
Standalone category continues to dominate
Pricing, convenience and quality are key battlegrounds in all locations

WHAT'S NEXT?

Consumer foodservice through travel predicted to grow fastest in value terms
Operators in all locations will continue to face cost challenges
Demographic trends set to gain influence over location strategies

COMPETITIVE LANDSCAPE

Zabka remains the top player in non-standalone locations
McDonald's still the leading company in standalone locations

CATEGORY DATA

Table 84 - Consumer Foodservice by Location: Units/Outlets 2020-2025
Table 85 - Sales in Consumer Foodservice by Location: Number of Transactions 2020-2025
Table 86 - Sales in Consumer Foodservice by Location: Foodservice Value 2020-2025
Table 87 - Consumer Foodservice by Location: % Units/Outlets Growth 2020-2025
Table 88 - Sales in Consumer Foodservice by Location: % Transaction Growth 2020-2025

Table 89 - Sales in Consumer Foodservice by Location: % Foodservice Value Growth 2020-2025

Table 90 - Consumer Foodservice Through Standalone: Units/Outlets 2020-2025

Table 91 - Sales in Consumer Foodservice Through Standalone: Number of Transactions 2020-2025

Table 92 - Sales in Consumer Foodservice Through Standalone: Foodservice Value 2020-2025

Table 93 - Consumer Foodservice Through Standalone: % Units/Outlets Growth 2020-2025

Table 94 - Sales in Consumer Foodservice Through Standalone: % Transaction Growth 2020-2025

Table 95 - Sales in Consumer Foodservice Through Standalone: % Foodservice Value Growth 2020-2025

Table 96 - Consumer Foodservice Through Leisure: Units/Outlets 2020-2025

Table 97 - Sales in Consumer Foodservice Through Leisure: Number of Transactions 2020-2025

Table 98 - Sales in Consumer Foodservice Through Leisure: Foodservice Value 2020-2025

Table 99 - Consumer Foodservice Through Leisure: % Units/Outlets Growth 2020-2025

Table 100 - Sales in Consumer Foodservice Through Leisure: % Transaction Growth 2020-2025

Table 101 - Sales in Consumer Foodservice Through Leisure: % Foodservice Value Growth 2020-2025

Table 102 - Consumer Foodservice Through Retail: Units/Outlets 2020-2025

Table 103 - Sales in Consumer Foodservice Through Retail: Number of Transactions 2020-2025

Table 104 - Sales in Consumer Foodservice Through Retail: Foodservice Value 2020-2025

Table 105 - Consumer Foodservice Through Retail: % Units/Outlets Growth 2020-2025

Table 106 - Sales in Consumer Foodservice Through Retail: % Transaction Growth 2020-2025

Table 107 - Sales in Consumer Foodservice Through Retail: % Foodservice Value Growth 2020-2025

Table 108 - Consumer Foodservice Through Lodging: Units/Outlets 2020-2025

Table 109 - Sales in Consumer Foodservice Through Lodging: Number of Transactions 2020-2025

Table 110 - Sales in Consumer Foodservice Through Lodging: Foodservice Value 2020-2025

Table 111 - Consumer Foodservice Through Lodging: % Units/Outlets Growth 2020-2025

Table 112 - Sales in Consumer Foodservice Through Lodging: % Transaction Growth 2020-2025

Table 113 - Sales in Consumer Foodservice Through Lodging: % Foodservice Value Growth 2020-2025

Table 114 - Consumer Foodservice Through Travel: Units/Outlets 2020-2025

Table 115 - Sales in Consumer Foodservice Through Travel: Number of Transactions 2020-2025

Table 116 - Sales in Consumer Foodservice Through Travel: Foodservice Value 2020-2025

Table 117 - Consumer Foodservice Through Travel: % Units/Outlets Growth 2020-2025

Table 118 - Sales in Consumer Foodservice Through Travel: % Transaction Growth 2020-2025

Table 119 - Sales in Consumer Foodservice Through Travel: % Foodservice Value Growth 2020-2025

Table 120 - Forecast Consumer Foodservice by Location: Units/Outlets 2025-2030

Table 121 - Forecast Sales in Consumer Foodservice by Location: Number of Transactions 2025-2030

Table 122 - Forecast Sales in Consumer Foodservice by Location: Foodservice Value 2025-2030

Table 123 - Forecast Consumer Foodservice by Location: % Units/Outlets Growth 2025-2030

Table 124 - Forecast Sales in Consumer Foodservice by Location: % Transaction Growth 2025-2030

Table 125 - Forecast Sales in Consumer Foodservice by Location: % Foodservice Value Growth 2025-2030

Table 126 - Forecast Consumer Foodservice Through Standalone: Units/Outlets 2025-2030

Table 127 - Forecast Sales in Consumer Foodservice Through Standalone: Number of Transactions 2025-2030

Table 128 - Forecast Sales in Consumer Foodservice Through Standalone: Foodservice Value 2025-2030

Table 129 - Forecast Consumer Foodservice Through Standalone: % Units/Outlets Growth 2025-2030

Table 130 - Forecast Sales in Consumer Foodservice Through Standalone: % Transaction Growth 2025-2030

Table 131 - Forecast Sales in Consumer Foodservice Through Standalone: % Foodservice Value Growth 2025-2030

Table 132 - Forecast Consumer Foodservice Through Leisure: Units/Outlets 2025-2030

Table 133 - Forecast Sales in Consumer Foodservice Through Leisure: Number of Transactions 2025-2030

Table 134 - Forecast Sales in Consumer Foodservice Through Leisure: Foodservice Value 2025-2030

Table 135 - Forecast Consumer Foodservice Through Leisure: % Units/Outlets Growth 2025-2030

Table 136 - Forecast Sales in Consumer Foodservice Through Leisure: % Transaction Growth 2025-2030

Table 137 - Forecast Sales in Consumer Foodservice Through Leisure: % Foodservice Value Growth 2025-2030

Table 138 - Forecast Consumer Foodservice Through Retail: Units/Outlets 2025-2030

Table 139 - Forecast Sales in Consumer Foodservice Through Retail: Number of Transactions 2025-2030

Table 140 - Forecast Sales in Consumer Foodservice Through Retail: Foodservice Value 2025-2030

Table 141 - Forecast Consumer Foodservice Through Retail: % Units/Outlets Growth 2025-2030
Table 142 - Forecast Sales in Consumer Foodservice Through Retail: % Transaction Growth 2025-2030
Table 143 - Forecast Sales in Consumer Foodservice Through Retail: % Foodservice Value Growth 2025-2030
Table 144 - Forecast Consumer Foodservice Through Lodging: Units/Outlets 2025-2030
Table 145 - Forecast Sales in Consumer Foodservice Through Lodging: Number of Transactions 2025-2030
Table 146 - Forecast Sales in Consumer Foodservice Through Lodging: Foodservice Value 2025-2030
Table 147 - Forecast Consumer Foodservice Through Lodging: % Units/Outlets Growth 2025-2030
Table 148 - Forecast Sales in Consumer Foodservice Through Lodging: % Transaction Growth 2025-2030
Table 149 - Forecast Sales in Consumer Foodservice Through Lodging: % Foodservice Value Growth 2025-2030
Table 150 - Forecast Consumer Foodservice Through Travel: Units/Outlets 2025-2030
Table 151 - Forecast Sales in Consumer Foodservice Through Travel: Number of Transactions 2025-2030
Table 152 - Forecast Sales in Consumer Foodservice Through Travel: Foodservice Value 2025-2030
Table 153 - Forecast Consumer Foodservice Through Travel: % Units/Outlets Growth 2025-2030
Table 154 - Forecast Sales in Consumer Foodservice Through Travel: % Transaction Growth 2025-2030
Table 155 - Forecast Sales in Consumer Foodservice Through Travel: % Foodservice Value Growth 2025-2030

DISCLAIMER

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-poland/report.