



# Full-Service Restaurants in Bulgaria

March 2026

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## Full-Service Restaurants in Bulgaria - Category analysis

### KEY DATA FINDINGS

#### 2025 DEVELOPMENTS

Strong trends visible in full-service restaurants

#### INDUSTRY PERFORMANCE

Consumers are seeing dining out as an affordable luxury

Bulgarians appreciate experiential dining in Asian full-service restaurants

Delivery emerging as a growth driver

#### WHAT'S NEXT?

Economic, cultural and dining trends to maintain positive value sales growth

Delivery to continue to develop as a strong fulfillment type

Digitalisation, menu and experiential moves to add dynamism

#### COMPETITIVE LANDSCAPE

Happy Bar&Grill continues to lead and drive growth

Independents offer authenticity and personalisation to dominate the category

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## Consumer Foodservice in Bulgaria - Industry Overview

### EXECUTIVE SUMMARY

Tourism, digitalisation and services add dynamism to consumer foodservice

### KEY DATA FINDINGS

#### INDUSTRY PERFORMANCE

Economic conditions influence foodservice operations and spending

Online and drive-through continue to penetrate the consumer foodservice landscape

Experiential dining and loyalty programmes strengthen consumer engagement

#### WHAT'S NEXT?

Steady value growth forecast but higher prices represent a challenge

Innovation through expansion, diversification and personalisation

"Greener" operations to emerge more fully

## COMPETITIVE LANDSCAPE

Chains and independents foster dual market dynamic

Happy Bar&Grill leverages brand name and good quality, affordable menus

McDonald's expands footprint in key locations

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Chained operators invest in locations and services

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