



Euromonitor  
International

# Consumer Foodservice in Bulgaria

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## Consumer Foodservice in Bulgaria

### 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

Independents show resilience among rising operating pressures

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Cafés/bars remains the most popular consumer foodservice category in Bulgaria

#### INDUSTRY PERFORMANCE

Economic and tourism recovery and strong coffee and socialising cultures underpin growth opportunities

Modern, experiential specialist coffee and tea shops enjoy growing popularity

Expanding menus encourage eat-in trade

#### WHAT'S NEXT?

Coffee and socialising cultures to provide robust consumption occasions

Takeaway digital ordering to add dynamism to fulfillment

Sustainability and innovation to gain impetus in the forecast period

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##### 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

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### Limited-Service Restaurants in Bulgaria

## KEY DATA FINDINGS

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Players cater to local consumers' food and fulfillment needs and preferences

### INDUSTRY PERFORMANCE

Resilient demand for a wide range of options

Affordability and convenience boost Middle Eastern and chicken formats

Delivery increases penetration in limited-service restaurants

### WHAT'S NEXT?

Positive, but more stable growth projection

Delivery and drive-through to continue to grow in popularity

Bulgarian consumers' preferences to influence innovation

### COMPETITIVE LANDSCAPE

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## Self-Service Cafeterias in Bulgaria

### KEY DATA FINDINGS

#### 2025 DEVELOPMENTS

Self-service cafeterias retain popularity with dynamism visible

#### INDUSTRY PERFORMANCE

Young adult audience adds dynamism to self-service cafeterias

Convenience and value for money positioning draw consumers

Self-service cafeterias appeal as an affordable dining experience

#### WHAT'S NEXT?

Players to continue to embrace a younger audience

Eat-in to remain the core type and focus of fulfillment

Sustainability is gaining weight in the strategies of self-service cafeterias

#### COMPETITIVE LANDSCAPE

BMS Group leverages value, familiarity and high-traffic locations to retain leadership

Ikea Restaurant enjoys appeal as a unique dining experience

Independents dominate through community presence and daily routine familiarity

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## Street Stalls/Kiosks in Bulgaria

### KEY DATA FINDINGS

#### 2025 DEVELOPMENTS

Consumers appreciate a wide and varied choice of units and menus

#### INDUSTRY PERFORMANCE

Sales growth despite a drop in outlet numbers

Independents gain from specialisation in popular, authentic street food items

Takeaway is the core fulfillment type

#### WHAT'S NEXT?

Expansion of contemporary offer to draw younger consumer base

App-based ordering to suit high-traffic locations

Smart kiosks to add dynamism to the landscape

## COMPETITIVE LANDSCAPE

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Go Grill taps into evolving consumer preferences in high-traffic areas to gain ground

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[Consumer Foodservice By Location in Bulgaria](#)

## KEY DATA FINDINGS

### 2025 DEVELOPMENTS

Foodservice locations see opportunities and challenges

## INDUSTRY PERFORMANCE

Retail foodservice benefits from high foot traffic

Standalone dominates, particularly in major cities

Online delivery continues to increase penetration in foodservice

## WHAT'S NEXT?

Foodservice operators are tapping into growing opportunities in leisure locations

Standalone outlets to remain most accessible for everyday dining

Varying challenges and opportunities depending on the location type

Demographic changes to increase focus on tourism and older consumer groups

## COMPETITIVE LANDSCAPE

Retailers benefit as consumers look for dining that fits with shopping routines

International chains focus on prime locations

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