



Consumer Foodservice in Portugal

March 2026

Table of Contents

Consumer Foodservice in Portugal

EXECUTIVE SUMMARY

Navigating structural dynamism and competitive pressures in the Portuguese market

KEY DATA FINDINGS

INDUSTRY PERFORMANCE

Tourism-driven growth and price increases drive Portugal's foodservice landscape

Evolution of third-party delivery platforms and their impact on Portuguese consumer foodservice

Premiumisation and omnichannel strategies as key drivers

WHAT'S NEXT?

Increasing market polarisation to shaping Portugal's foodservice industry

Digitalisation as a strategic lever

Sustainability rising as a pillar of differentiation

COMPETITIVE LANDSCAPE

Digital engagement and loyalty strategies reinforce leadership of McDonald's

Minipreço integration positions Auchan Retail as growth leader in 2025

Largest international players expand in Portugal

CHANNELS

Market consolidation amid rising costs and consumer polarisation

Chains and independents: Different approaches to innovation

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 Fulfilment: % 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 Portugal

KEY DATA FINDINGS

2025 DEVELOPMENTS

Premiumisation and market rationalisation within cafés/bars

INDUSTRY PERFORMANCE

Tourism, pricing and competitive dynamics shape cafés/bars

Specialist coffee and tea shops drive premiumisation with dynamic growth
Limited delivery adoption amid independent players' domination

WHAT'S NEXT?

Cafés/bars: Value set to grow amid outlet contraction and market rationalisation
Eat-in to maintain dominance amid low delivery penetration
Premiumisation and sustainable practices set to rise over the coming years

COMPETITIVE LANDSCAPE

Pingo Doce retains leadership of highly fragmented landscape
Minipreço integration strengthens Auchan Cafeteria expansion
Chains outperform 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 Portugal](#)

KEY DATA FINDINGS

2025 DEVELOPMENTS

Value growth sustained by premiumisation amid operational pressures

INDUSTRY PERFORMANCE

Value growth amid declining footfall
North American full-service restaurants lead 2025 growth
Eat-in dominance, value pressures and premium segment growth

WHAT'S NEXT?

Cautious outlook with rising transaction values amid potential tourism slowdown
The future of full-service fulfilment involves balancing experience and convenience
Intensifying competition will be a major challenge for full-service restaurants

COMPETITIVE LANDSCAPE

M & J Pestana gains leadership of highly fragmented competitive landscape
Dynamic growth for Portugália Restauração as it invests in outlet renovation and menu updates
Independent operators remain dominant, while chains outperform in value growth

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 Portugal

KEY DATA FINDINGS

2025 DEVELOPMENTS

Strategic expansion and demographic shifts in Portugal's limited-service channel

INDUSTRY PERFORMANCE

Convenience and affordability fuel growth of limited-service restaurants
Latin American format is as the most dynamic performer
Delivery and drive-through expansion add value to limited-service restaurants

WHAT'S NEXT?

Limited-service restaurants set to rise amid growing competitive landscape
Convenience set to boost third-party delivery growth
Automation as key growth driver

COMPETITIVE LANDSCAPE

McDonald's leads concentrated competitive landscape with further expansion
Seasonal flavours and strategic store openings drive Santini's performance
Chains strengthen market dominance in terms of foodservice value

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 Portugal

KEY DATA FINDINGS

2025 DEVELOPMENTS

Tech innovation and retail integration drive double-digit value growth

INDUSTRY PERFORMANCE

Self-Service cafeterias on the rise as value proposition evolves
Mobility trends fuel growth in highway-linked self-service cafeterias
Although incipient, delivery gains ground

WHAT'S NEXT?

Self-service cafeterias set to rise, boosted by convenience and flourishing competitive environment
Delivery set to gain steam amid eat-in hegemony
Duality in self-service cafeterias

COMPETITIVE LANDSCAPE

Pingo Doce's Comida Fresca leads self-service cafeterias
Outlets expansion boosts Comida Fresca performance
Chained leads self-service cafeteria sales

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 Portugal

KEY DATA FINDINGS

2025 DEVELOPMENTS

Independent-led growth amid regulatory tightening

INDUSTRY PERFORMANCE

Growth amid intensifying competition for street stalls/kiosks
Street food faces margin pressures, despite dominance of independents
Regulatory tightening brings greater formalisation to street stalls/kiosks operations

WHAT'S NEXT?

Street stalls/kiosks set to sustain growth amid rising competitive pressures
Regulatory complexity set to shape future street food dynamics
Urban mobility measures to boost foodservice opportunities

COMPETITIVE LANDSCAPE

Nabeirorest leads fragmented competitive landscape amid portfolio restructuring
Palavra Surpresa records dynamic growth
Independents show strength in volume but weakness in scale

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 Portugal](#)

KEY DATA FINDINGS

2025 DEVELOPMENTS

Location-based performance in Portugal's foodservice landscape

INDUSTRY PERFORMANCE

Lodging is most dynamic foodservice location performer in 2025
Standalone locations show resilient value growth in 2025
Retail-integrated foodservice drives outlet expansion

WHAT'S NEXT?

Lodging to further drive value growth through chef-led experiences
Standalone: Rising sales amidst intensifying cost and competitive pressures
Demographic trends set to shape location strategies

COMPETITIVE LANDSCAPE

High competition among non-standalone locations
Independents lead share in standalone

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-portugal/report.