



Consumer Foodservice in Hungary

March 2026

Table of Contents

Consumer Foodservice in Hungary

EXECUTIVE SUMMARY

Continuing resilience in challenging environment

KEY DATA FINDINGS

INDUSTRY PERFORMANCE

Value sales increase, though profit margins remain under pressure

Delivery online ordering now crucial revenue stream

Experience and loyalty programmes increasingly important

WHAT'S NEXT?

Outlook uncertain

Space for innovation, though traditional still dominates

Increasing focus on sustainability

COMPETITIVE LANDSCAPE

McDonald's continues to lead

Local chain Simon's Burger gains value share

Continuing dynamism

CHANNELS

Chains make gains

Different pricing structure for home delivery, especially from full-service restaurants

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 Hungary

KEY DATA FINDINGS

2025 DEVELOPMENTS

Increasing polarisation

INDUSTRY PERFORMANCE

Local neighbourhood bars under pressure

Juice/smoothie bars gains most value share
Eat-in still dominant, though home delivery growing revenue stream

WHAT'S NEXT?

Increasing polarisation over forecast period
On-site consumption continues to dominate
Innovation, along with tradition, key to success

COMPETITIVE LANDSCAPE

Starbucks leads in fragmented landscape
Tchibo gains most value share
Independent operators dominate

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 Hungary](#)

KEY DATA FINDINGS

2025 DEVELOPMENTS

Mixed performance in 2025

INDUSTRY PERFORMANCE

Polarising effect, with community restaurants in decline
Asian restaurants register highest value growth
Home delivery continues to grow, but with challenges

WHAT'S NEXT?

Positive outlook over forecast period
Slowing growth in online delivery
Continuing experimentation over forecast period.

COMPETITIVE LANDSCAPE

High Rock Café leads in fragmented landscape
Planet Sushi gains most value share
Independent operators continue to dominate

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 Hungary

KEY DATA FINDINGS

2025 DEVELOPMENTS

Global chains dominate

INDUSTRY PERFORMANCE

Sluggish economy supports limited-service restaurants

Burger limited-service restaurants perform strongly

Takeaway and online ordering and delivery continue to register growth

WHAT'S NEXT?

Continuing healthy value growth over forecast period

Stronger emphasis on eat-in

Increasing emphasis on quality

COMPETITIVE LANDSCAPE

McDonald's holds on to strong lead

Local chain Simon's Burger gains most value share

Chains account for significantly higher value share

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 Hungary

KEY DATA FINDINGS

2025 DEVELOPMENTS

Affordable, healthy food supports sales

INDUSTRY PERFORMANCE

Positive value growth, though facing increasing competition from limited-service restaurants

Office workers and shoppers key consumer base

Limited demand for online delivery

WHAT'S NEXT?

Moderate constant value growth over forecast period

Hone delivery gains some ground

Increasing focus on sustainability

COMPETITIVE LANDSCAPE

IKEA holds on to top spot

Fresh Corner gains most value share

Independent operators dominate, though chained outlets more profitable

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 Hungary

KEY DATA FINDINGS

2025 DEVELOPMENTS

Landscape becoming more consolidated

INDUSTRY PERFORMANCE

Healthy value growth in 2025

Chains making gains

Value sales supported by on-the-go consumption

WHAT'S NEXT?

Muted constant value growth over forecast period
Growth in eat-in options
Space both for chained and independent outlets to grow, with differing focuses

COMPETITIVE LANDSCAPE

Fornetti holds on to commanding lead
Pek-Snack most dynamic brand in 2025
Independent outlets account for most value share

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 Hungary](#)

KEY DATA FINDINGS

2025 DEVELOPMENTS

Retail locations benefit from delivery platforms and food courts

INDUSTRY PERFORMANCE

Retail best performing location for non-standalone
Positive increase in value sales for standalone
Delivery online ordering continues to gain value share

WHAT'S NEXT?

Retail registers highest value growth, though potential also for standalone
Players need to be adaptable
Changing demographics influence choice of location

COMPETITIVE LANDSCAPE

Large international chains favour retail

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

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