



Passport

Limited-Service Restaurants in Romania

Euromonitor International

April 2022

This sample report is for illustration purposes only.

Some content and data have been changed.

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Move towards takeaway and home delivery amidst continued restrictions	1
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LIMITED-SERVICE RESTAURANTS IN ROMANIA - CATEGORY ANALYSIS

KEY DATA FINDINGS

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2021 DEVELOPMENTS

Move towards takeaway and home delivery amidst continued restrictions

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International burger and chicken chains perform well with drive-through and delivery

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A range of cuisines perform well, led by Latin American limited-service restaurants

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PROSPECTS AND OPPORTUNITIES

Dynamism expected as COVID-19 restrictions ease

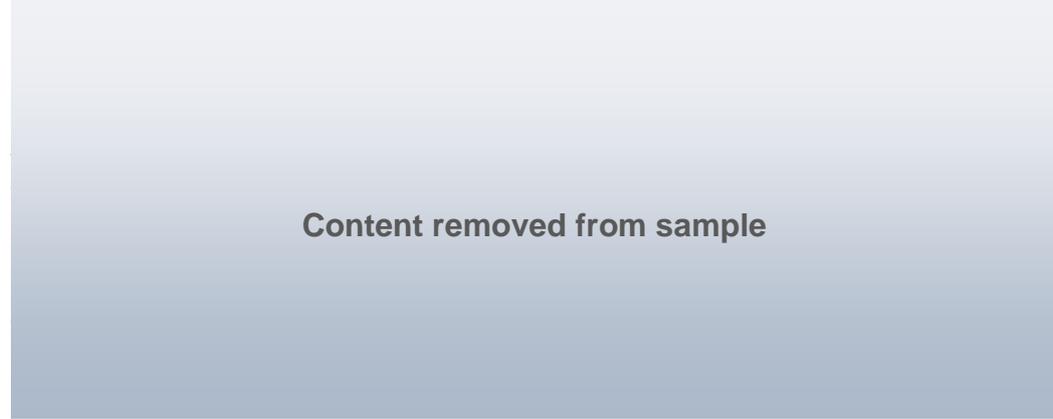
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Chains expected to be attracted to shopping centres

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McDonald's set to maintain its lead, with digitalisation being A growth driver



CATEGORY DATA

Table 1 Limited-Service Restaurants by Category: Units/Outlets 2016-2021

outlets	2016	2017	2018	2019	2020	2021
-- Asian Limited-Service Restaurants	Data removed from sample					
--- Chained Asian Limited-Service Restaurants						
--- Independent Asian Limited-Service Restaurants						
-- Bakery Products Limited-Service Restaurants						
--- Chained Bakery Products Limited-Service Restaurants						
--- Independent Bakery Products Limited-Service Restaurants						
-- Burger Limited-Service Restaurants						
--- Chained Burger Limited-Service Restaurants						
--- Independent Burger Limited-Service Restaurants						
-- Chicken Limited-Service Restaurants						
--- Chained Chicken Limited-Service Restaurants						

Restaurants
--- Independent Chicken
Limited-Service
Restaurants
-- Convenience Stores
Limited-Service
Restaurants
--- Chained Convenience
Stores Limited-Service
Restaurants
--- Independent
Convenience Stores
Limited-Service
Restaurants
-- Fish Limited-Service
Restaurants
--- Chained Fish
Limited-Service
Restaurants
--- Independent Fish
Limited-Service
Restaurants
-- Ice Cream Limited-
Service Restaurants
--- Chained Ice Cream
Limited-Service
Restaurants
--- Independent Ice
Cream Limited-Service
Restaurants
-- Latin American
Limited-Service
Restaurants
--- Chained Latin
American Limited-
Service Restaurants
--- Independent Latin
American Limited-
Service Restaurants
-- Middle Eastern
Limited-Service
Restaurants
--- Chained Middle
Eastern Limited-Service
Restaurants
--- Independent Middle
Eastern Limited-Service
Restaurants
-- Pizza Limited-
Service Restaurants
--- Chained Pizza
Limited-Service
Restaurants
--- Independent Pizza
Limited-Service
Restaurants
-- Other Limited-
Service Restaurants
--- Chained Other
Limited-Service
Restaurants

Data removed from sample

--- Independent Other Limited-Service Restaurants
 - Limited-Service Restaurants by Type

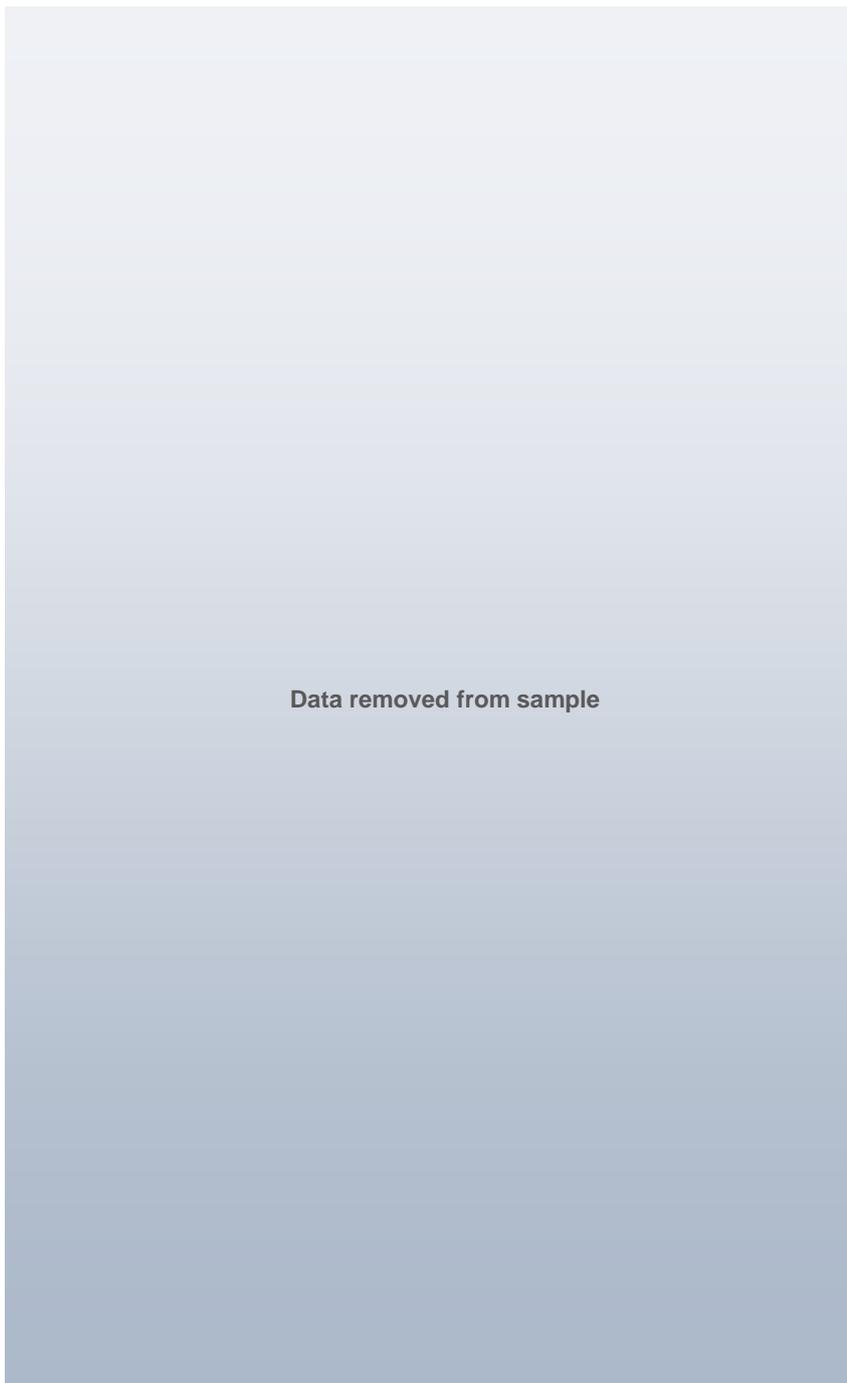
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Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 2 Sales in Limited-Service Restaurants by Category: Number of Transactions 2016-2021

'000 transactions	2016	2017	2018	2019	2020	2021
-- Asian Limited-Service Restaurants	Data removed from sample					
--- Chained Asian Limited-Service Restaurants						
--- Independent Asian Limited-Service Restaurants						
-- Bakery Products Limited-Service Restaurants						
--- Chained Bakery Products Limited-Service Restaurants						
--- Independent Bakery Products Limited-Service Restaurants						
-- Burger Limited-Service Restaurants						
--- Chained Burger Limited-Service Restaurants						
--- Independent Burger Limited-Service Restaurants						
-- Chicken Limited-Service Restaurants						
--- Chained Chicken Limited-Service Restaurants						
--- Independent Chicken Limited-Service Restaurants						
-- Convenience Stores Limited-Service Restaurants						
--- Chained Convenience Stores Limited-Service Restaurants						
--- Independent Convenience Stores Limited-Service Restaurants						
-- Fish Limited-Service Restaurants						

- Chained Fish Limited-Service Restaurants
- Independent Fish Limited-Service Restaurants
- Ice Cream Limited-Service Restaurants
- Chained Ice Cream Limited-Service Restaurants
- Independent Ice Cream Limited-Service Restaurants
- Latin American Limited-Service Restaurants
- Chained Latin American Limited-Service Restaurants
- Independent Latin American Limited-Service Restaurants
- Middle Eastern Limited-Service Restaurants
- Chained Middle Eastern Limited-Service Restaurants
- Independent Middle Eastern Limited-Service Restaurants
- Pizza Limited-Service Restaurants
- Chained Pizza Limited-Service Restaurants
- Independent Pizza Limited-Service Restaurants
- Other Limited-Service Restaurants
- Chained Other Limited-Service Restaurants
- Independent Other Limited-Service Restaurants
- Limited-Service Restaurants by Type



Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

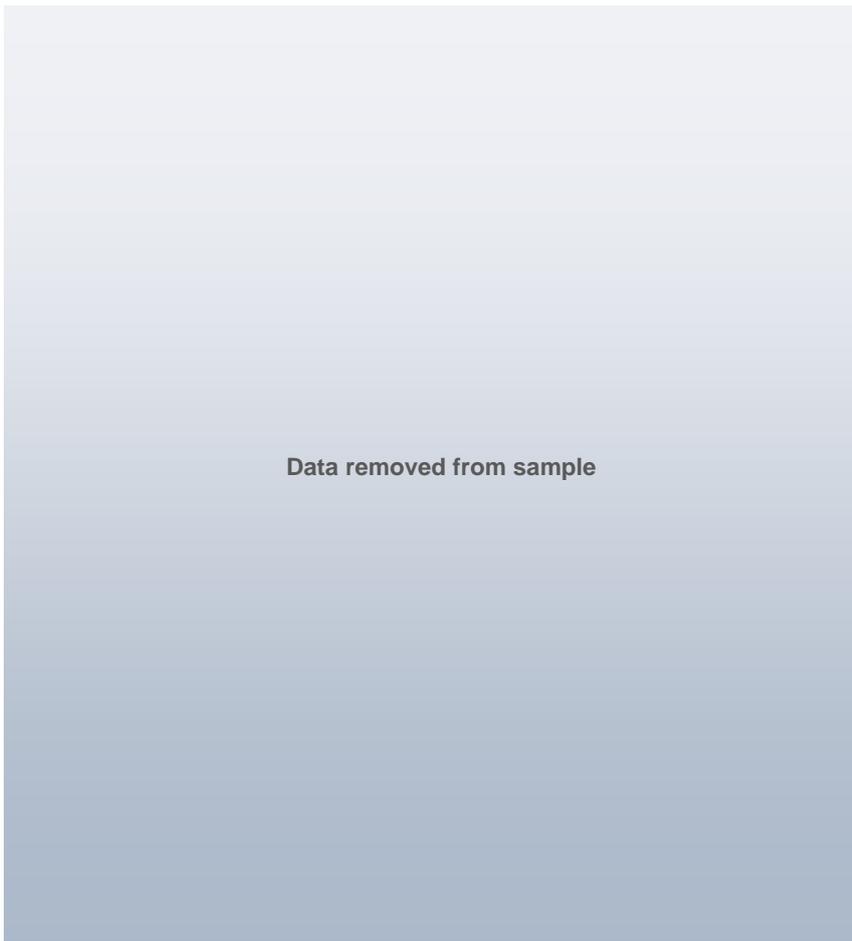
Table 3 Sales in Limited-Service Restaurants by Category: Foodservice Value 2016-2021

RON million	2016	2017	2018	2019	2020	2021
-------------	------	------	------	------	------	------

- Asian Limited-Service Restaurants
- Chained Asian Limited-Service Restaurants
- Independent Asian Limited-Service Restaurants
- Bakery Products Limited-Service Restaurants
- Chained Bakery Products Limited-Service Restaurants
- Independent Bakery Products Limited-Service Restaurants
- Burger Limited-Service Restaurants
- Chained Burger Limited-Service Restaurants
- Independent Burger Limited-Service Restaurants
- Chicken Limited-Service Restaurants
- Chained Chicken Limited-Service Restaurants
- Independent Chicken Limited-Service Restaurants
- Convenience Stores Limited-Service Restaurants
- Chained Convenience Stores Limited-Service Restaurants
- Independent Convenience Stores Limited-Service Restaurants
- Fish Limited-Service Restaurants
- Chained Fish Limited-Service Restaurants
- Independent Fish Limited-Service Restaurants
- Ice Cream Limited-Service Restaurants
- Chained Ice Cream Limited-Service Restaurants
- Independent Ice Cream Limited-Service Restaurants
- Latin American Limited-Service

Data removed from sample

- Restaurants
- Chained Latin American Limited-Service Restaurants
- Independent Latin American Limited-Service Restaurants
- Middle Eastern Limited-Service Restaurants
- Chained Middle Eastern Limited-Service Restaurants
- Independent Middle Eastern Limited-Service Restaurants
- Pizza Limited-Service Restaurants
- Chained Pizza Limited-Service Restaurants
- Independent Pizza Limited-Service Restaurants
- Other Limited-Service Restaurants
- Chained Other Limited-Service Restaurants
- Independent Other Limited-Service Restaurants
- Limited-Service Restaurants by Type



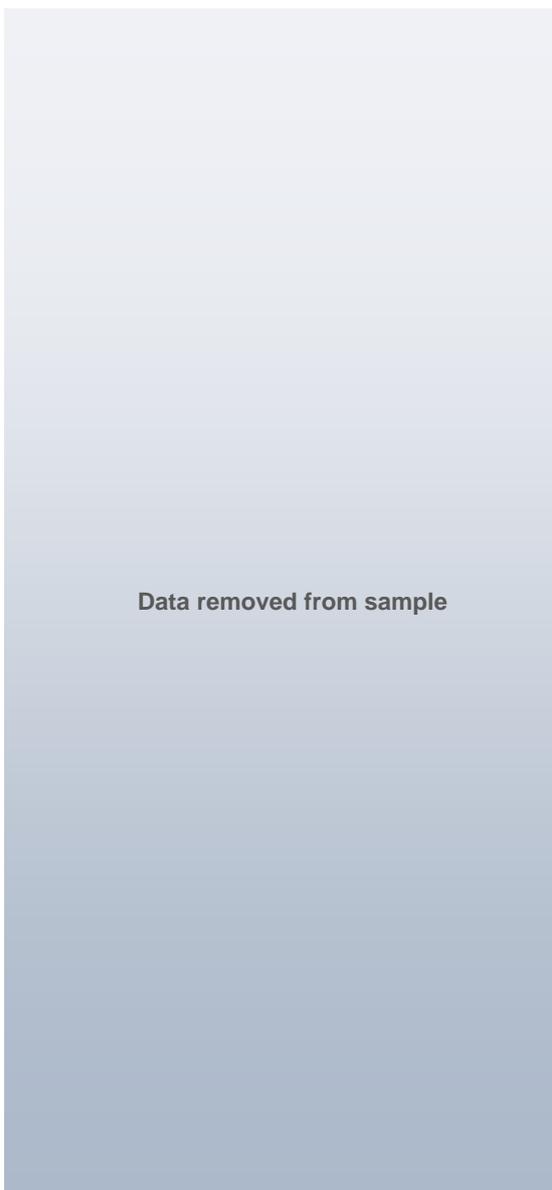
Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 4 Limited-Service Restaurants by Category: % Units/Outlets Growth 2016-2021

% Units/Outlets growth	2020/21	2016-21 CAGR	2016/21 Total
-- Asian Limited-Service Restaurants			
--- Chained Asian Limited-Service Restaurants			
--- Independent Asian Limited-Service Restaurants			
-- Bakery Products Limited-Service Restaurants			
--- Chained Bakery Products Limited-Service Restaurants			
--- Independent Bakery Products Limited-Service Restaurants			
-- Burger Limited-Service Restaurants			
--- Chained Burger Limited-Service Restaurants			
--- Independent Burger Limited-Service Restaurants			
-- Chicken Limited-Service Restaurants			



- Chained Chicken Limited-Service Restaurants
- Independent Chicken Limited-Service Restaurants
- Convenience Stores Limited-Service Restaurants
- Chained Convenience Stores Limited-Service Restaurants
- Independent Convenience Stores Limited-Service Restaurants
- Fish Limited-Service Restaurants
- Chained Fish Limited-Service Restaurants
- Independent Fish Limited-Service Restaurants
- Ice Cream Limited-Service Restaurants
- Chained Ice Cream Limited-Service Restaurants
- Independent Ice Cream Limited-Service Restaurants
- Latin American Limited-Service Restaurants
- Chained Latin American Limited-Service Restaurants
- Independent Latin American Limited-Service Restaurants
- Middle Eastern Limited-Service Restaurants
- Chained Middle Eastern Limited-Service Restaurants
- Independent Middle Eastern Limited-Service Restaurants
- Pizza Limited-Service Restaurants
- Chained Pizza Limited-Service Restaurants
- Independent Pizza Limited-Service Restaurants
- Other Limited-Service Restaurants
- Chained Other Limited-Service Restaurants
- Independent Other Limited-Service Restaurants
- Limited-Service Restaurants by Type



Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 5 Sales in Limited-Service Restaurants by Category: % Transaction Growth 2016-2021

% transaction growth	2020/21	2016-21 CAGR	2016/21 Total
-- Asian Limited-Service Restaurants	Data removed from sample		
--- Chained Asian Limited-Service Restaurants			
--- Independent Asian Limited-Service Restaurants			
-- Bakery Products Limited-Service Restaurants			

- Chained Bakery Products Limited-Service Restaurants
- Independent Bakery Products Limited-Service Restaurants
- Burger Limited-Service Restaurants
- Chained Burger Limited-Service Restaurants
- Independent Burger Limited-Service Restaurants
- Chicken Limited-Service Restaurants
- Chained Chicken Limited-Service Restaurants
- Independent Chicken Limited-Service Restaurants
- Convenience Stores Limited-Service Restaurants
- Chained Convenience Stores Limited-Service Restaurants
- Independent Convenience Stores Limited-Service Restaurants
- Fish Limited-Service Restaurants
- Chained Fish Limited-Service Restaurants
- Independent Fish Limited-Service Restaurants
- Ice Cream Limited-Service Restaurants
- Chained Ice Cream Limited-Service Restaurants
- Independent Ice Cream Limited-Service Restaurants
- Latin American Limited-Service Restaurants
- Chained Latin American Limited-Service Restaurants
- Independent Latin American Limited-Service Restaurants
- Middle Eastern Limited-Service Restaurants
- Chained Middle Eastern Limited-Service Restaurants
- Independent Middle Eastern Limited-Service Restaurants
- Pizza Limited-Service Restaurants
- Chained Pizza Limited-Service Restaurants
- Independent Pizza Limited-Service Restaurants
- Other Limited-Service Restaurants
- Chained Other Limited-Service Restaurants
- Independent Other Limited-Service Restaurants
- Limited-Service Restaurants by Type

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 6 Sales in Limited-Service Restaurants by Category: % Foodservice Value Growth 2016-2021

% value growth

2020/21 2016-21 CAGR 2016/21 Total

- Asian Limited-Service Restaurants
- Chained Asian Limited-Service Restaurants
- Independent Asian Limited-Service Restaurants
- Bakery Products Limited-Service Restaurants
- Chained Bakery Products Limited-Service Restaurants
- Independent Bakery Products Limited-Service Restaurants
- Burger Limited-Service Restaurants
- Chained Burger Limited-Service Restaurants
- Independent Burger Limited-Service Restaurants
- Chicken Limited-Service Restaurants
- Chained Chicken Limited-Service Restaurants
- Independent Chicken Limited-Service Restaurants
- Convenience Stores Limited-Service Restaurants
- Chained Convenience Stores Limited-Service Restaurants
- Independent Convenience Stores Limited-Service Restaurants
- Fish Limited-Service Restaurants
- Chained Fish Limited-Service Restaurants
- Independent Fish Limited-Service Restaurants
- Ice Cream Limited-Service Restaurants
- Chained Ice Cream Limited-Service Restaurants
- Independent Ice Cream Limited-Service Restaurants
- Latin American Limited-Service Restaurants
- Chained Latin American Limited-Service Restaurants
- Independent Latin American Limited-Service Restaurants
- Middle Eastern Limited-Service Restaurants
- Chained Middle Eastern Limited-Service Restaurants
- Independent Middle Eastern Limited-Service Restaurants
- Pizza Limited-Service Restaurants
- Chained Pizza Limited-Service Restaurants
- Independent Pizza Limited-Service Restaurants
- Other Limited-Service Restaurants
- Chained Other Limited-Service Restaurants
- Independent Other Limited-Service Restaurants

Data removed from sample

Restaurants
- Limited-Service Restaurants by Type



Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 7 GBO Company Shares in Chained Limited-Service Restaurants: % Foodservice Value 2017-2021

% value Company	2017	2018	2019	2020	2021
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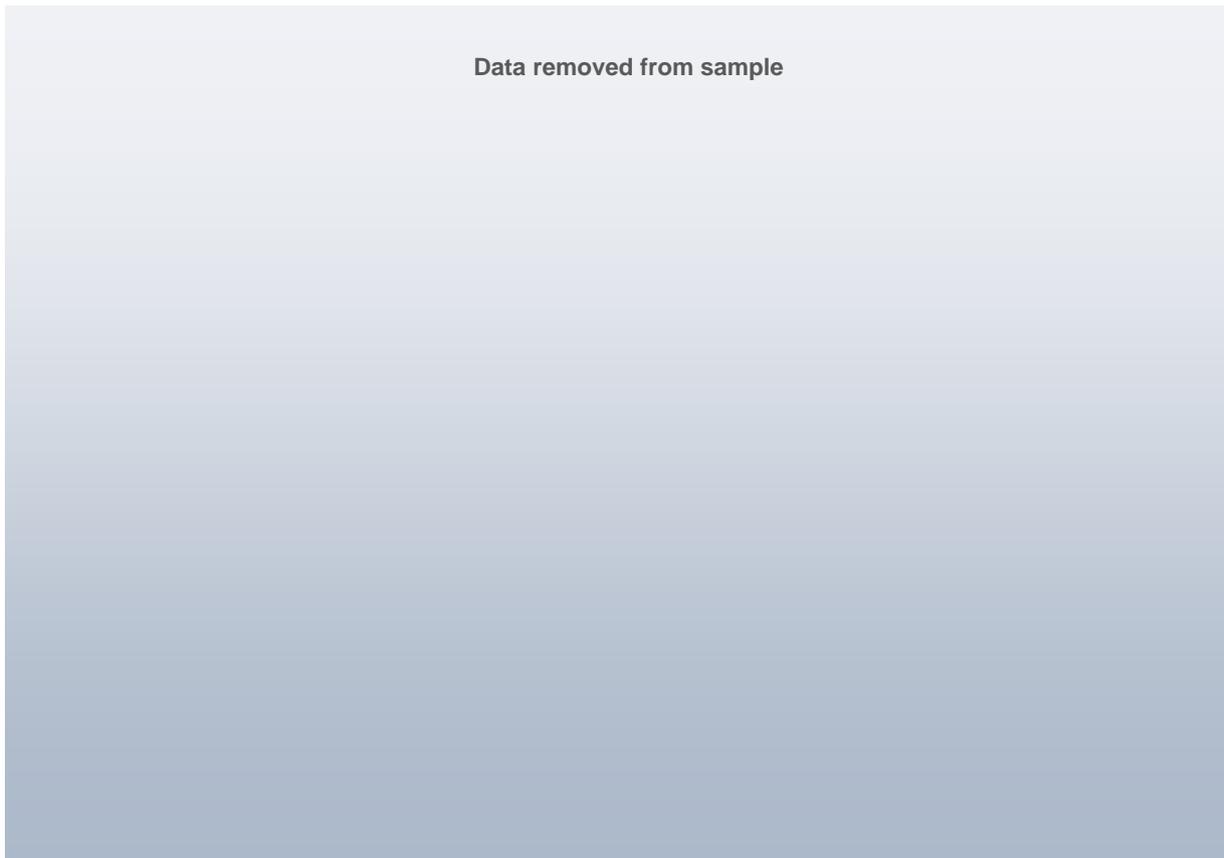
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Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 8 GBN Brand Shares in Chained Limited-Service Restaurants: % Foodservice Value 2018-2021

% value Brand	Global Brand Owner	2018	2019	2020	2021
---------------	--------------------	------	------	------	------

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Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

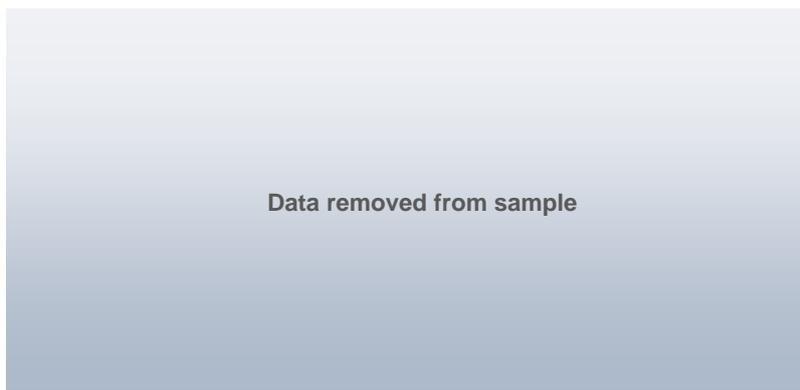
Table 9 Forecast Limited-Service Restaurants by Category: Units/Outlets 2021-2026

outlets	2021	2022	2023	2024	2025	2026
-- Asian Limited-Service Restaurants	Data removed from sample					
--- Chained Asian Limited-Service Restaurants						
--- Independent Asian Limited-Service Restaurants						
-- Bakery Products Limited-Service Restaurants						
--- Chained Bakery Products Limited-Service Restaurants						
--- Independent Bakery Products Limited-Service Restaurants						
-- Burger Limited-Service Restaurants						
--- Chained Burger						

Limited-Service
Restaurants
--- Independent Burger
Limited-Service
Restaurants
-- Chicken Limited-
Service Restaurants
--- Chained Chicken
Limited-Service
Restaurants
--- Independent Chicken
Limited-Service
Restaurants
-- Convenience Stores
Limited-Service
Restaurants
--- Chained Convenience
Stores Limited-Service
Restaurants
--- Independent
Convenience Stores
Limited-Service
Restaurants
-- Fish Limited-Service
Restaurants
--- Chained Fish
Limited-Service
Restaurants
--- Independent Fish
Limited-Service
Restaurants
-- Ice Cream Limited-
Service Restaurants
--- Chained Ice Cream
Limited-Service
Restaurants
--- Independent Ice
Cream Limited-Service
Restaurants
-- Latin American
Limited-Service
Restaurants
--- Chained Latin
American Limited-
Service Restaurants
--- Independent Latin
American Limited-
Service Restaurants
-- Middle Eastern
Limited-Service
Restaurants
--- Chained Middle
Eastern Limited-Service
Restaurants
--- Independent Middle
Eastern Limited-Service
Restaurants
-- Pizza Limited-
Service Restaurants
--- Chained Pizza
Limited-Service

Data removed from sample

- Restaurants
- Independent Pizza Limited-Service Restaurants
- Other Limited-Service Restaurants
- Chained Other Limited-Service Restaurants
- Independent Other Limited-Service Restaurants
- Limited-Service Restaurants by Type



Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 10 Forecast Sales in Limited-Service Restaurants by Category: Number of Transactions 2021-2026

'000 transactions

	2021	2022	2023	2024	2025	2026
-- Asian Limited-Service Restaurants	Data removed from sample					
--- Chained Asian Limited-Service Restaurants						
--- Independent Asian Limited-Service Restaurants						
-- Bakery Products Limited-Service Restaurants						
--- Chained Bakery Products Limited-Service Restaurants						
--- Independent Bakery Products Limited-Service Restaurants						
-- Burger Limited-Service Restaurants						
--- Chained Burger Limited-Service Restaurants						
--- Independent Burger Limited-Service Restaurants						
-- Chicken Limited-Service Restaurants						
--- Chained Chicken Limited-Service Restaurants						
--- Independent Chicken Limited-Service Restaurants						
-- Convenience Stores Limited-Service Restaurants						

- Chained Convenience Stores Limited-Service Restaurants
- Independent Convenience Stores Limited-Service Restaurants
- Fish Limited-Service Restaurants
- Chained Fish Limited-Service Restaurants
- Independent Fish Limited-Service Restaurants
- Ice Cream Limited-Service Restaurants
- Chained Ice Cream Limited-Service Restaurants
- Independent Ice Cream Limited-Service Restaurants
- Latin American Limited-Service Restaurants
- Chained Latin American Limited-Service Restaurants
- Independent Latin American Limited-Service Restaurants
- Middle Eastern Limited-Service Restaurants
- Chained Middle Eastern Limited-Service Restaurants
- Independent Middle Eastern Limited-Service Restaurants
- Pizza Limited-Service Restaurants
- Chained Pizza Limited-Service Restaurants
- Independent Pizza Limited-Service Restaurants
- Other Limited-Service Restaurants
- Chained Other Limited-Service Restaurants
- Independent Other Limited-Service Restaurants
- Limited-Service Restaurants by Type

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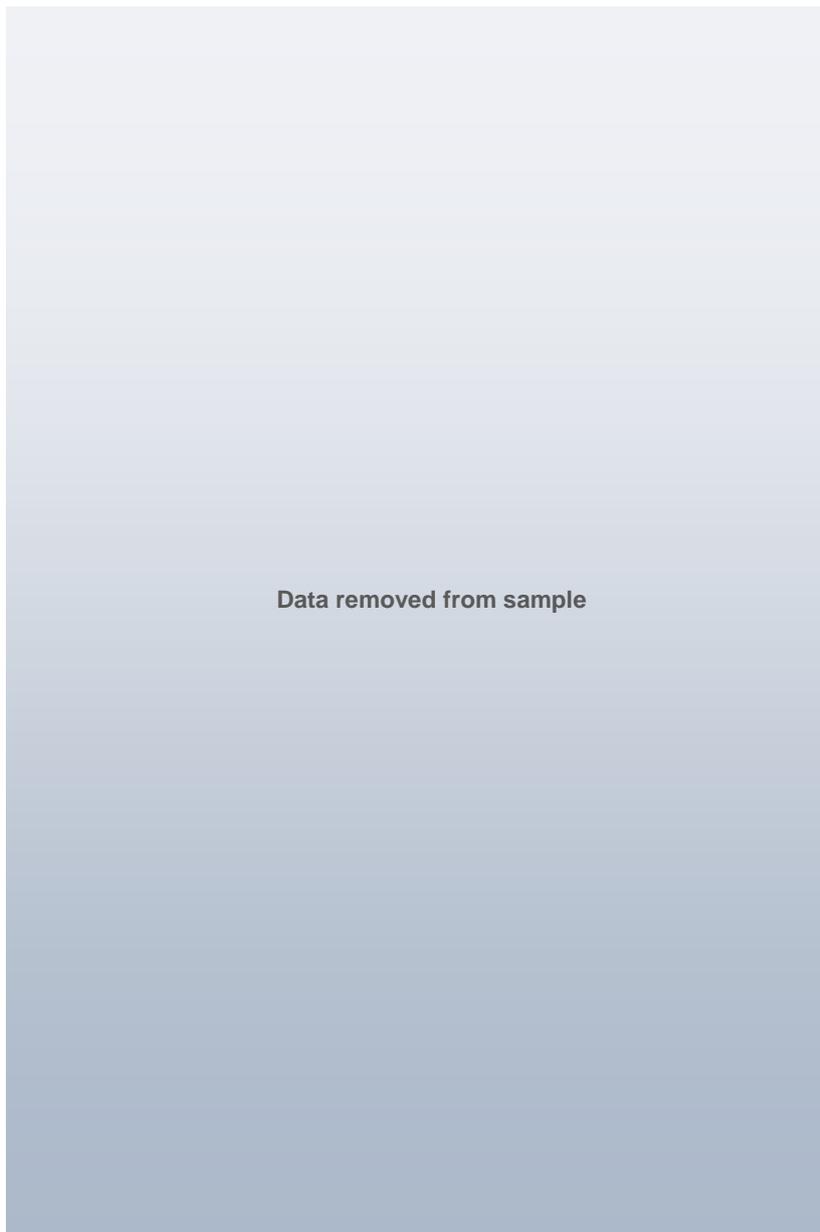
Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 11 Forecast Sales in Limited-Service Restaurants by Category: Foodservice Value 2021-2026

RON million	2021	2022	2023	2024	2025	2026
-- Asian Limited-Service Restaurants						
--- Chained Asian Limited-Service Restaurants						
--- Independent Asian Limited-Service Restaurants						
-- Bakery Products Limited-Service Restaurants						
--- Chained Bakery Products Limited-Service Restaurants						
--- Independent Bakery Products Limited-Service Restaurants						
-- Burger Limited-Service Restaurants						
--- Chained Burger Limited-Service Restaurants						
--- Independent Burger Limited-Service Restaurants						
-- Chicken Limited-Service Restaurants						
--- Chained Chicken Limited-Service Restaurants						
--- Independent Chicken Limited-Service Restaurants						
-- Convenience Stores Limited-Service Restaurants						
--- Chained Convenience Stores Limited-Service Restaurants						
--- Independent Convenience Stores Limited-Service Restaurants						
-- Fish Limited-Service Restaurants						
--- Chained Fish Limited-Service Restaurants						
--- Independent Fish Limited-Service Restaurants						

Data removed from sample

- Restaurants
- Ice Cream Limited-Service Restaurants
- Chained Ice Cream Limited-Service Restaurants
- Independent Ice Cream Limited-Service Restaurants
- Latin American Limited-Service Restaurants
- Chained Latin American Limited-Service Restaurants
- Independent Latin American Limited-Service Restaurants
- Middle Eastern Limited-Service Restaurants
- Chained Middle Eastern Limited-Service Restaurants
- Independent Middle Eastern Limited-Service Restaurants
- Pizza Limited-Service Restaurants
- Chained Pizza Limited-Service Restaurants
- Independent Pizza Limited-Service Restaurants
- Other Limited-Service Restaurants
- Chained Other Limited-Service Restaurants
- Independent Other Limited-Service Restaurants
- Limited-Service Restaurants by Type



Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 12 Forecast Limited-Service Restaurants by Category: % Units/Outlets Growth 2021-2026

% Units/Outlets growth

	2021/2022	2021-26 CAGR	2021/26 Total
-- Asian Limited-Service Restaurants	Data removed from sample		
--- Chained Asian Limited-Service Restaurants			
--- Independent Asian Limited-Service Restaurants			

- Bakery Products Limited-Service Restaurants
- Chained Bakery Products Limited-Service Restaurants
- Independent Bakery Products Limited-Service Restaurants
- Burger Limited-Service Restaurants
- Chained Burger Limited-Service Restaurants
- Independent Burger Limited-Service Restaurants
- Chicken Limited-Service Restaurants
- Chained Chicken Limited-Service Restaurants
- Independent Chicken Limited-Service Restaurants
- Convenience Stores Limited-Service Restaurants
- Chained Convenience Stores Limited-Service Restaurants
- Independent Convenience Stores Limited-Service Restaurants
- Fish Limited-Service Restaurants
- Chained Fish Limited-Service Restaurants
- Independent Fish Limited-Service Restaurants
- Ice Cream Limited-Service Restaurants
- Chained Ice Cream Limited-Service Restaurants
- Independent Ice Cream Limited-Service Restaurants
- Latin American Limited-Service Restaurants
- Chained Latin American Limited-Service Restaurants
- Independent Latin American Limited-Service Restaurants
- Middle Eastern Limited-Service Restaurants
- Chained Middle Eastern Limited-Service Restaurants
- Independent Middle Eastern Limited-Service Restaurants
- Pizza Limited-Service Restaurants
- Chained Pizza Limited-Service Restaurants
- Independent Pizza Limited-Service Restaurants
- Other Limited-Service Restaurants
- Chained Other Limited-Service Restaurants
- Independent Other Limited-Service Restaurants
- Limited-Service Restaurants by Type

Data removed from sample

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 13 Forecast Sales in Limited-Service Restaurants by Category: % Transaction Growth 2021-2026

% transaction growth	2021/2022	2021-26 CAGR	2021/26 Total
-- Asian Limited-Service Restaurants			
--- Chained Asian Limited-Service Restaurants			
--- Independent Asian Limited-Service Restaurants			
-- Bakery Products Limited-Service Restaurants			
--- Chained Bakery Products Limited-Service Restaurants			
--- Independent Bakery Products Limited-Service Restaurants			
-- Burger Limited-Service Restaurants			
--- Chained Burger Limited-Service Restaurants			
--- Independent Burger Limited-Service Restaurants			
-- Chicken Limited-Service Restaurants			
--- Chained Chicken Limited-Service Restaurants			
--- Independent Chicken Limited-Service Restaurants			
-- Convenience Stores Limited-Service Restaurants			
--- Chained Convenience Stores Limited-Service Restaurants			
--- Independent Convenience Stores Limited-Service Restaurants			
-- Fish Limited-Service Restaurants			
--- Chained Fish Limited-Service Restaurants			
--- Independent Fish Limited-Service Restaurants			
-- Ice Cream Limited-Service Restaurants			
--- Chained Ice Cream Limited-Service Restaurants			
--- Independent Ice Cream Limited-Service Restaurants			
-- Latin American Limited-Service Restaurants			
--- Chained Latin American Limited-Service Restaurants			
--- Independent Latin American Limited-Service Restaurants			
-- Middle Eastern Limited-Service Restaurants			
--- Chained Middle Eastern Limited-Service Restaurants			
--- Independent Middle Eastern Limited-Service Restaurants			
-- Pizza Limited-Service Restaurants			
--- Chained Pizza Limited-Service Restaurants			
--- Independent Pizza Limited-Service Restaurants			

Data removed from sample

- Other Limited-Service Restaurants
- Chained Other Limited-Service Restaurants
- Independent Other Limited-Service Restaurants
- Limited-Service Restaurants by Type

Data removed from sample

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 14 Forecast Sales in Limited-Service Restaurants by Category: % Foodservice Value Growth 2021-2026

% value growth

2021/2022 2021-26 CAGR 2021/26 Total

- Asian Limited-Service Restaurants
- Chained Asian Limited-Service Restaurants
- Independent Asian Limited-Service Restaurants
- Bakery Products Limited-Service Restaurants
- Chained Bakery Products Limited-Service Restaurants
- Independent Bakery Products Limited-Service Restaurants
- Burger Limited-Service Restaurants
- Chained Burger Limited-Service Restaurants
- Independent Burger Limited-Service Restaurants
- Chicken Limited-Service Restaurants
- Chained Chicken Limited-Service Restaurants
- Independent Chicken Limited-Service Restaurants
- Convenience Stores Limited-Service Restaurants
- Chained Convenience Stores Limited-Service Restaurants
- Independent Convenience Stores Limited-Service Restaurants
- Fish Limited-Service Restaurants
- Chained Fish Limited-Service Restaurants
- Independent Fish Limited-Service Restaurants
- Ice Cream Limited-Service Restaurants
- Chained Ice Cream Limited-Service Restaurants
- Independent Ice Cream Limited-Service Restaurants
- Latin American Limited-Service Restaurants
- Chained Latin American Limited-Service Restaurants
- Independent Latin American Limited-Service Restaurants
- Middle Eastern Limited-Service

Data removed from sample

- Restaurants
- Chained Middle Eastern Limited-Service Restaurants
- Independent Middle Eastern Limited-Service Restaurants
- Pizza Limited-Service Restaurants
- Chained Pizza Limited-Service Restaurants
- Independent Pizza Limited-Service Restaurants
- Other Limited-Service Restaurants
- Chained Other Limited-Service Restaurants
- Independent Other Limited-Service Restaurants
- Limited-Service Restaurants by Type



Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

CONSUMER FOODSERVICE IN ROMANIA - INDUSTRY OVERVIEW

EXECUTIVE SUMMARY

Consumer foodservice in 2021: The big picture

The COVID-19 pandemic continued to impact the everyday lives of Romanians in 2021, with third and fourth waves of the virus leading to further restrictions, and players and consumers

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2021 key trends

Stronger recovery of consumer foodservice in 2021 after the downturn in 2020 was also prevented by economic decisions. Due to the freezing of increases in public wages, pensions

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Competitive landscape

Chained consumer foodservice saw the best performance in 2021, as a result of international brands, which proved to be very active through takeaway and home delivery in the periods of

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Independent foodservice developments

Independent foodservice players were more negatively affected by COVID-19 in 2021 than chains, as they operate on smaller margins and therefore did not have the financial reserves to

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What next for consumer foodservice?

The forecast period is expected to see the continued recovery of consumer foodservice, as long as the number of vaccinated Romanians continues to increase, and thus the number of

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MARKET DATA

Table 15 Units, Transactions and Value Sales in Consumer Foodservice 2016-2021

	2016	2017	2018	2019	2020	2021
Units	Data removed from sample					
Transactions (mn)						
RON million current prices						
RON million constant prices						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 16 Units, Transactions and Value Sales in Consumer Foodservice: % Growth 2016-2021

% growth	2020/21	2016-21 CAGR	2016/21 Total
Units	Data removed from sample		
Transactions			
Value current prices			
Value constant prices			

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 17 Consumer Foodservice by Independent vs Chained by Type: Units/Outlets 2021

outlets	Independent	Chained	Total
Cafés/Bars	Data removed from sample		
Full-Service Restaurants			
Limited-Service Restaurants			
Self-Service Cafeterias			
Street Stalls/Kiosks			
Consumer Foodservice by Type			

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 18 Consumer Foodservice by Independent vs Chained: % Foodservice Value 2016-2021

% value	2016	2017	2018	2019	2020	2021
Chained Foodservice	Data removed from sample					
Independent Foodservice						
Total						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 19 Sales in Consumer Foodservice by Eat-In vs Delivery and To-Go: % Foodservice Value 2016-2021

% value	2016	2017	2018	2019	2020	2021
Drive-Through	Data removed from sample					
Eat-in						
Home Delivery						
Takeaway						
Total						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 20 Sales in Consumer Foodservice by Food vs Drink Split: % Foodservice Value 2016-2021

% value	2016	2017	2018	2019	2020	2021
Drink	Data removed from sample					
Food						
Total						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 21 Sales in Consumer Foodservice by Food vs Drink Split by Type: % Foodservice Value 2021

% value analysis	Food	Drink	Total
Cafés/Bars	Data removed from sample		
Full-Service Restaurants			
Limited-Service Restaurants			
Self-Service Cafeterias			
Street Stalls/Kiosks			
Consumer Foodservice by Type			

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 22 Sales in Consumer Foodservice by Online/Offline Ordering: % Foodservice Value 2016-2021

% value	2016	2017	2018	2019	2020	2021
Offline	Data removed from sample					
Online						
Total						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 23 Sales in Consumer Foodservice by Location: % Foodservice Value 2016-2021

% value	2016	2017	2018	2019	2020	2021
Leisure	Data removed from sample					
Lodging						
Retail						
Stand-Alone						
Travel						
Total						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 24 GBO Company Shares in Chained Consumer Foodservice: % Foodservice Value 2017-2021

% value	2017	2018	2019	2020	2021
Company	Data removed from sample				

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

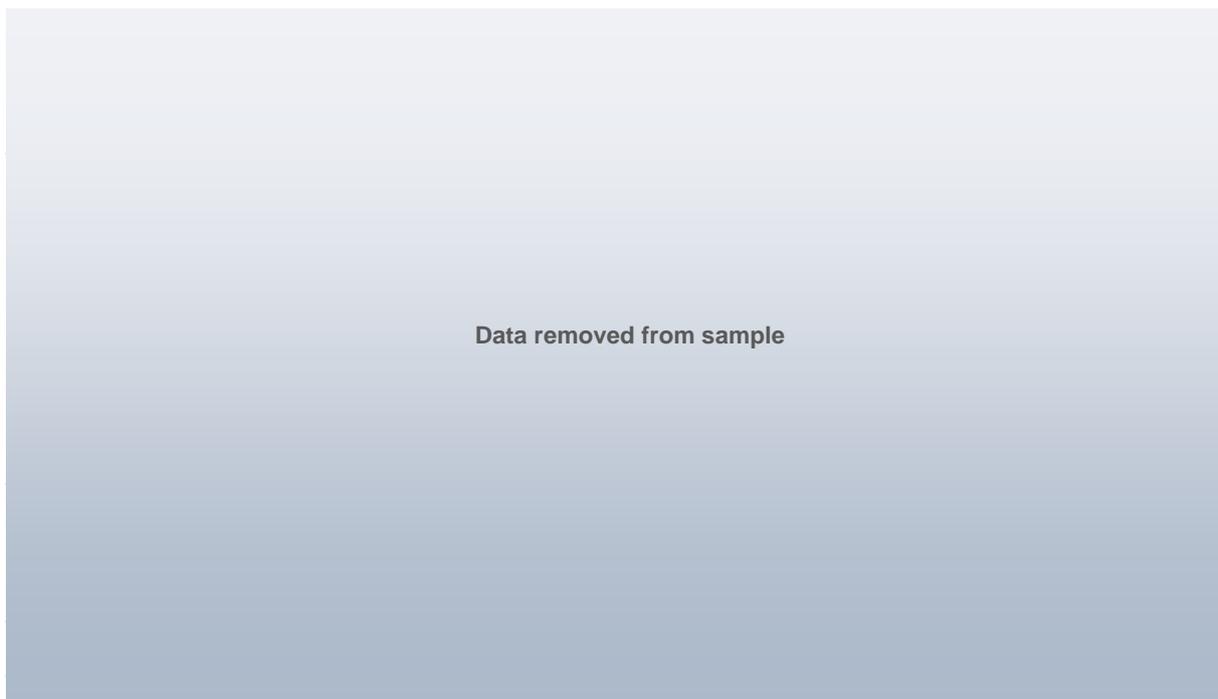
Table 25 GBN Brand Shares in Chained Consumer Foodservice: % Foodservice Value
2018-2021

% value Brand	Global Brand Owner	2018	2019	2020	2021
Data removed from sample					

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 26 GBN Brand Shares in Chained Consumer Foodservice: Units/Outlets 2021

Brand	Global Brand Owner	outlets
Data removed from sample		



Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 27 Forecast Units, Transactions and Value Sales in Consumer Foodservice 2021-2026

	2021	2022	2023	2024	2025	2026
Units	Data removed from sample					
Transactions (mn)						
RON million						

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 28 Forecast Units, Transactions and Value Sales in Consumer Foodservice: % Growth 2021-2026

% growth	2021/22	2021-26 CAGR	2021/26 Total
Units	Data removed from sample		
Transactions			
Constant value			

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

DISCLAIMER

Forecast closing date: 7 February 2022

Report closing date: 20 April 2022

Euromonitor International's Consumer Foodservice research took place before the invasion of Ukraine. As such, the impact of the war in Ukraine and sanctions on Russia are not factored into our forecast data and analysis. The repercussions of the crisis and implications at a wider regional/global level will be addressed in the near- to mid-terms by Euromonitor International, through commentary and reports which will be published on both Euromonitor.com and our Passport platform.

Despite the war in Ukraine, Consumer Foodservice in Eastern Europe is expected to continue to show signs of recovery in 2022, with the removal of most pandemic restrictions. However, extremely high inflation rates are the main threat to recovery, and these rates are likely to accelerate due to the invasion of Ukraine, which has placed additional pressure on both food and energy prices. The war will also limit the number of incoming tourists into the region, an important consideration in boosting consumer foodservice value sales. Furthermore, as a result of the ongoing situation, local consumers across the region are currently less inclined to go out to eat, while donations to support Ukraine are becoming commonplace in shopping baskets, with a subsequent impact on discretionary income. All of these factors will slow the return to pre-pandemic growth levels, meaning recovery is unlikely to happen before the end of 2023 at the earliest.

SOURCES

Sources used during the research included the following:

Summary 1 Research Sources

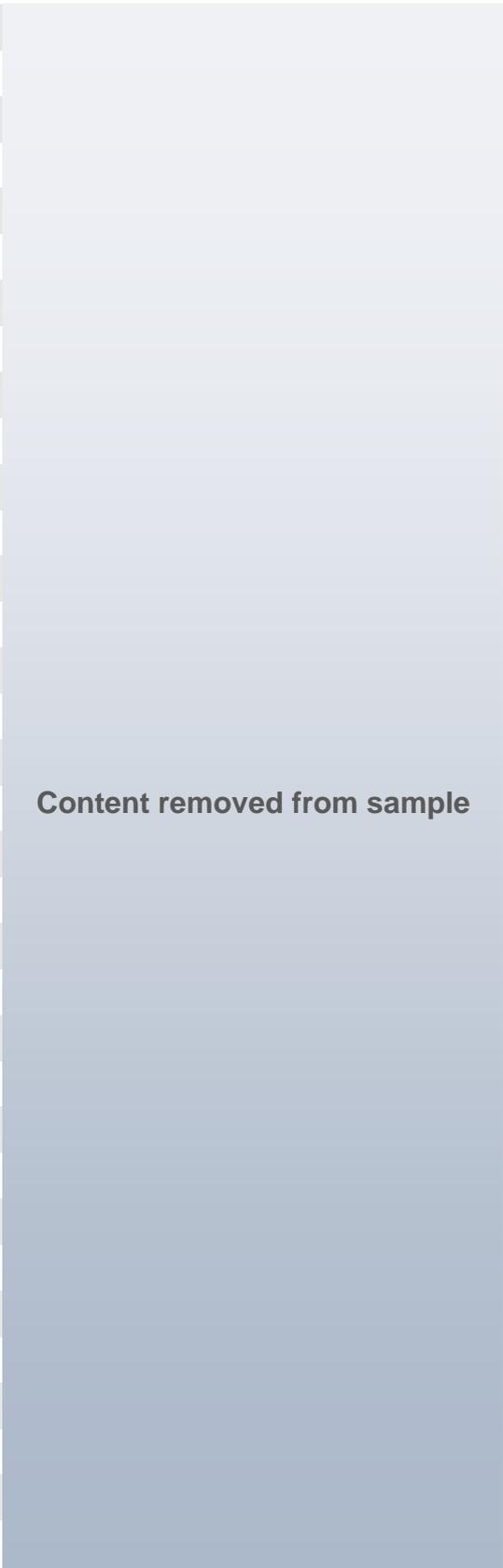
Official Sources

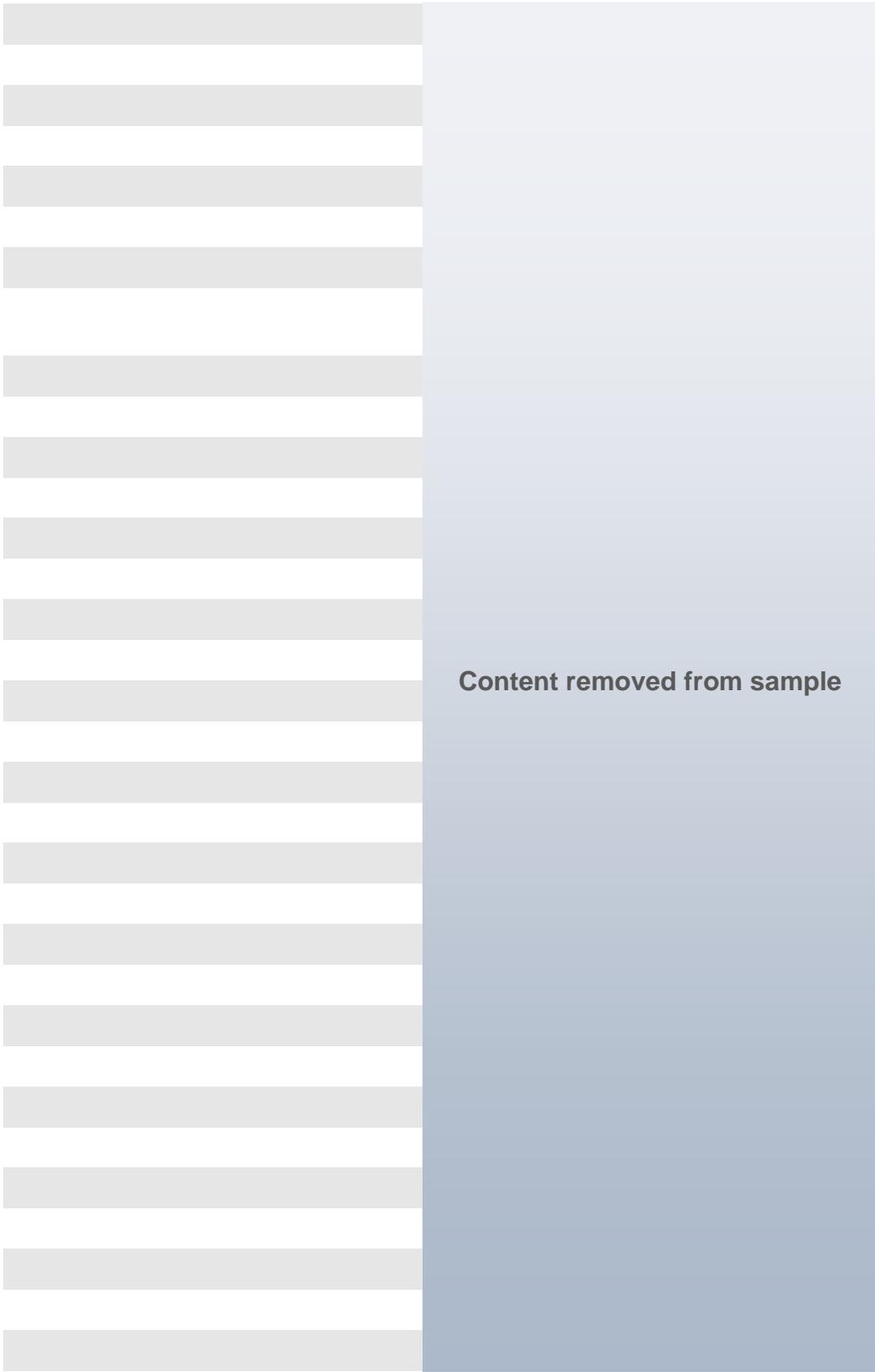
Trade Associations

Trade Press

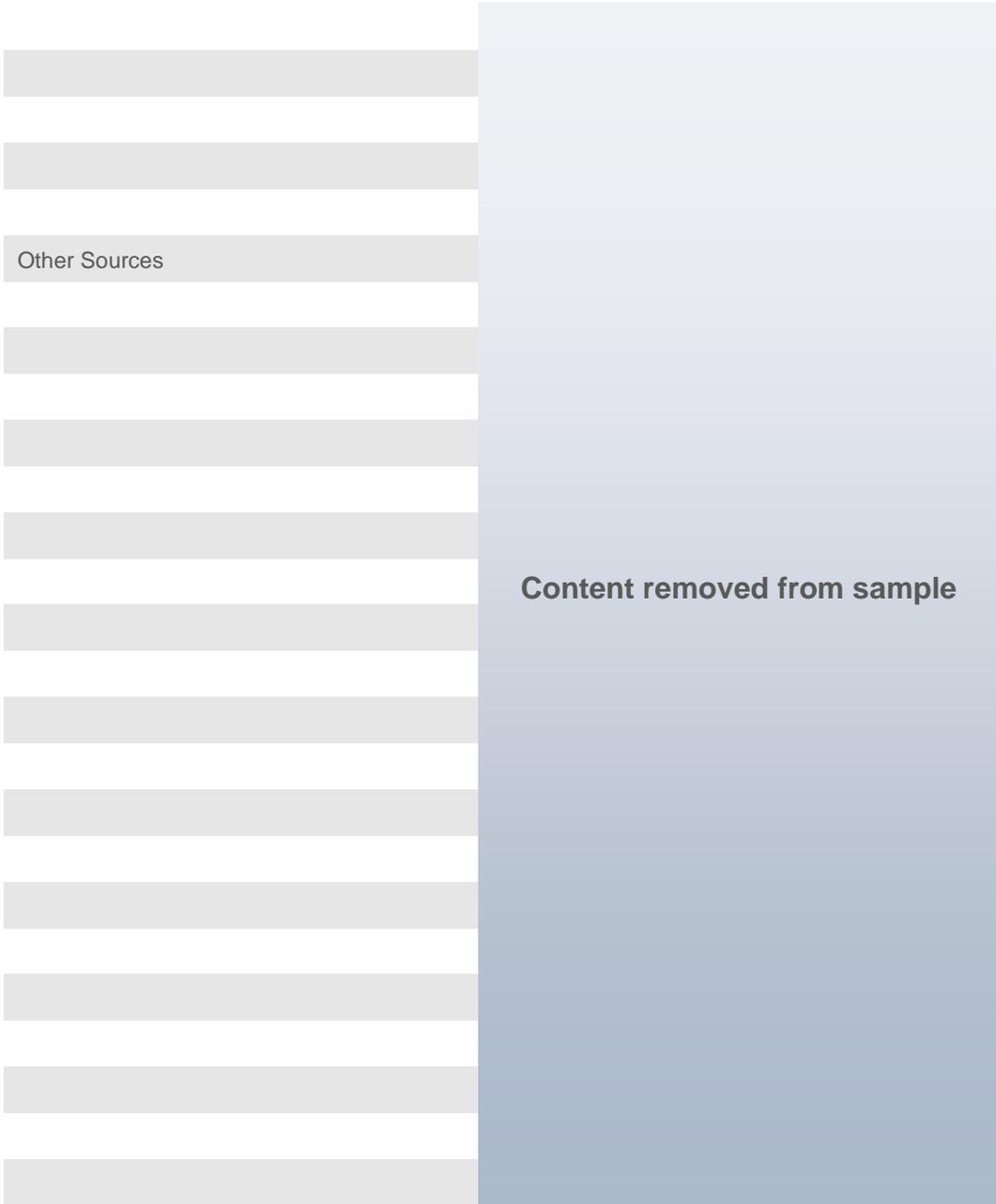
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Company Sources
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Source: Euromonitor International