

Consumer Foodservice in Poland

Market Direction | 2023-03-13 | 97 pages | Euromonitor

AVAILABLE LICENSES:

- Single User Licence €1750.00
- Multiple User License (1 Site) €3500.00
- Multiple User License (Global) €5250.00

Report description:

Before the COVID-19 pandemic, consumer foodservice was driven by a change in the lifestyle of Poles to whom convenience, free time and exploring new cuisines were increasingly important. The demand for catering services, including delivery, was growing, in line with the mobility of Poles, as well as domestic and incoming tourism. The pandemic stopped the dynamic development of foodservice and strongly weakened the financial backing of operators. At the beginning of 2022, foodservice operators ho...

Euromonitor International's Consumer Foodservice in Poland report offers a comprehensive guide to the size and shape of the market at a national level. It provides foodservice sales, the number of outlets and the number of transactions by sector, allowing you to identify the foodservice sectors driving growth. It identifies the leading companies, the leading brands and offers strategic analysis of key factors influencing the market - be they eating habits, lifestyle changes, tourism spending or legislative issues. Forecasts to 2027 illustrate how the market is set to change.

Product coverage: Consumer Foodservice by Location, Consumer Foodservice by Type.

Data coverage: market sizes (historic and forecasts), company shares, brand shares and distribution data.

Why buy this report?

- * Get a detailed picture of the Consumer Foodservice market;
- * Pinpoint growth sectors and identify factors driving change;
- * Understand the competitive environment, the market's major players and leading brands;
- * Use five-year forecasts to assess how the market is predicted to develop.

Euromonitor International has over 40 years' experience of publishing market research reports, business reference books and online information systems. With offices in London, Chicago, Singapore, Shanghai, Vilnius, Dubai, Cape Town, Santiago, Sydney, Tokyo and Bangalore and a network of over 800 analysts worldwide, Euromonitor International has a unique capability to develop reliable information resources to help drive informed strategic planning.

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

Table of Contents:

Consumer Foodservice in Poland
Euromonitor International
March 2023

List Of Contents And Tables

CONSUMER FOODSERVICE IN POLAND

EXECUTIVE SUMMARY

Consumer foodservice in 2022: The big picture
2022 key trends
Competitive landscape
Independent foodservice developments
What next for consumer foodservice?

MARKET DATA

Table 1 Units, Transactions and Value Sales in Consumer Foodservice 2017-2022
Table 2 Units, Transactions and Value Sales in Consumer Foodservice: % Growth 2017-2022
Table 3 Consumer Foodservice by Independent vs Chained by Type: Units/Outlets 2022
Table 4 Consumer Foodservice by Independent vs Chained: % Foodservice Value 2017-2022
Table 5 Sales in Consumer Foodservice by Eat-In vs Delivery and To-Go: % Foodservice Value 2017-2022
Table 6 Sales in Consumer Foodservice by Food vs Drink Split: % Foodservice Value 2017-2022
Table 7 Sales in Consumer Foodservice by Food vs Drink Split by Type: % Foodservice Value 2022
Table 8 Sales in Consumer Foodservice by Online/Offline Ordering: % Foodservice Value 2017-2022
Table 9 Sales in Consumer Foodservice by Location: % Foodservice Value 2017-2022
Table 10 □GBO Company Shares in Chained Consumer Foodservice: % Foodservice Value 2018-2022
Table 11 □GBN Brand Shares in Chained Consumer Foodservice: % Foodservice Value 2019-2022
Table 12 □GBN Brand Shares in Chained Consumer Foodservice: Units/Outlets 2022
Table 13 □Forecast Units, Transactions and Value Sales in Consumer Foodservice 2022-2027
Table 14 □Forecast Units, Transactions and Value Sales in Consumer Foodservice: % Growth 2022-2027

DISCLAIMER

SOURCES

Summary 1 Research Sources

LIMITED-SERVICE RESTAURANTS IN POLAND

KEY DATA FINDINGS

2022 DEVELOPMENTS

Price sensitivity attracts consumers to convenience stores limited-service restaurants
Players expand their menus to respond to the growing demand for vegan options
Limited-service restaurants develop their omnichannel presence and innovate in concept to draw consumer attention

PROSPECTS AND OPPORTUNITIES

Limited-service restaurants are better positioned to weather the economic storm
More health-centric limited-service restaurants are expected to emerge as health awareness rises
Competitive landscape set to further consolidate

CATEGORY DATA

Table 15 Limited-Service Restaurants by Category: Units/Outlets 2017-2022
Table 16 Sales in Limited-Service Restaurants by Category: Number of Transactions 2017-2022
Table 17 Sales in Limited-Service Restaurants by Category: Foodservice Value 2017-2022
Table 18 Limited-Service Restaurants by Category: % Units/Outlets Growth 2017-2022

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

Table 19 Sales in Limited-Service Restaurants by Category: % Transaction Growth 2017-2022
 Table 20 Sales in Limited-Service Restaurants by Category: % Foodservice Value Growth 2017-2022
 Table 21 GBO Company Shares in Chained Limited-Service Restaurants: % Foodservice Value 2018-2022
 Table 22 GBN Brand Shares in Chained Limited-Service Restaurants: % Foodservice Value 2019-2022
 Table 23 Forecast Limited-Service Restaurants by Category: Units/Outlets 2022-2027
 Table 24 □Forecast Sales in Limited-Service Restaurants by Category: Number of Transactions 2022-2027
 Table 25 □Forecast Sales in Limited-Service Restaurants by Category: Foodservice Value 2022-2027
 Table 26 □Forecast Limited-Service Restaurants by Category: % Units/Outlets Growth 2022-2027
 Table 27 □Forecast Sales in Limited-Service Restaurants by Category: % Transaction Growth 2022-2027
 Table 28 □Forecast Sales in Limited-Service Restaurants by Category: % Foodservice Value Growth 2022-2027

CAFES/BARS IN POLAND

KEY DATA FINDINGS

2022 DEVELOPMENTS

Fuller recovery seen in 2022 as restrictions are lifted
 Competition from other channels stifles growth of cafes
 Coca-Cola transfers the control of Costa Coffee to Lagardere Group

PROSPECTS AND OPPORTUNITIES

Inflationary pressures will continue to negatively affect cafes/bars in 2023
 Cofix endeavours to open more locations in Poland
 New coffee-making habits might dampen sales growth of cafes/bars

CATEGORY DATA

Table 29 Cafes/Bars by Category: Units/Outlets 2017-2022
 Table 30 Sales in Cafes/Bars by Category: Number of Transactions 2017-2022
 Table 31 Sales in Cafes/Bars by Category: Foodservice Value 2017-2022
 Table 32 Cafes/Bars by Category: % Units/Outlets Growth 2017-2022
 Table 33 Sales in Cafes/Bars by Category: % Transaction Growth 2017-2022
 Table 34 Sales in Cafes/Bars by Category: % Foodservice Value Growth 2017-2022
 Table 35 GBO Company Shares in Chained Cafes/Bars: % Foodservice Value 2018-2022
 Table 36 GBN Brand Shares in Chained Cafes/Bars: % Foodservice Value 2019-2022
 Table 37 Forecast Cafes/Bars by Category: Units/Outlets 2022-2027
 Table 38 □Forecast Sales in Cafes/Bars by Category: Number of Transactions 2022-2027
 Table 39 □Forecast Sales in Cafes/Bars by Category: Foodservice Value 2022-2027
 Table 40 □Forecast Cafes/Bars by Category: % Units/Outlets Growth 2022-2027
 Table 41 □Forecast Sales in Cafes/Bars by Category: % Transaction Growth 2022-2027
 Table 42 □Forecast Sales in Cafes/Bars by Category: % Foodservice Value Growth 2022-2027

FULL-SERVICE RESTAURANTS IN POLAND

KEY DATA FINDINGS

2022 DEVELOPMENTS

Rising prices are the main driver of growth in 2022
 Consumers cut back on discretionary spending as prices rise
 Geo-political tensions negatively affect tourism

PROSPECTS AND OPPORTUNITIES

Inflationary pressures set to place a downward pressure on profit margins
 European full-service restaurants maintain their stronghold while Middle Eastern full-service restaurants rise in popularity
 Orkla keen to become a dominant player in pizza full-service restaurants

CATEGORY DATA

Table 43 Full-Service Restaurants by Category: Units/Outlets 2017-2022

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

Table 44 Sales in Full-Service Restaurants by Category: Number of Transactions 2017-2022

Table 45 Sales in Full-Service Restaurants by Category: Foodservice Value 2017-2022

Table 46 Full-Service Restaurants by Category: % Units/Outlets Growth 2017-2022

Table 47 Sales in Full-Service Restaurants by Category: % Transaction Growth 2017-2022

Table 48 Sales in Full-Service Restaurants by Category: % Foodservice Value Growth 2017-2022

Table 49 GBO Company Shares in Chained Full-Service Restaurants: % Foodservice Value 2018-2022

Table 50 GBN Brand Shares in Chained Full-Service Restaurants: % Foodservice Value 2019-2022

Table 51 Forecast Full-Service Restaurants by Category: Units/Outlets 2022-2027

Table 52 □Forecast Sales in Full-Service Restaurants by Category: Number of Transactions 2022-2027

Table 53 □Forecast Sales in Full-Service Restaurants by Category: Foodservice Value 2022-2027

Table 54 □Forecast Full-Service Restaurants by Category: % Units/Outlets Growth 2022-2027

Table 55 □Forecast Sales in Full-Service Restaurants by Category: % Transaction Growth 2022-2027

Table 56 □Forecast Sales in Full-Service Restaurants by Category: % Foodservice Value Growth 2022-2027

SELF-SERVICE CAFETERIAS IN POLAND

KEY DATA FINDINGS

2022 DEVELOPMENTS

Home working and studying and COVID-19 outlet closures hamper recovery

Rising prices contribute to strong value increase in 2022

Slow recovery for Ikea Restaurant

PROSPECTS AND OPPORTUNITIES

Positive factors set to lead to a rapid value rebound

Remote working and remote learning likely to negatively affect sales

Dominance of independent operators set to continue

CATEGORY DATA

Table 57 Self-Service Cafeterias: Units/Outlets 2017-2022

Table 58 Sales in Self-Service Cafeterias: Number of Transactions 2017-2022

Table 59 Sales in Self-Service Cafeterias: Foodservice Value 2017-2022

Table 60 Sales in Self-Service Cafeterias: % Units/Outlets Growth 2017-2022

Table 61 Sales in Self-Service Cafeterias: % Transaction Growth 2017-2022

Table 62 Sales in Self-Service Cafeterias: % Foodservice Value Growth 2017-2022

Table 63 GBO Company Shares in Chained Self-Service Cafeterias: % Foodservice Value 2018-2022

Table 64 GBN Brand Shares in Chained Self-Service Cafeterias: % Foodservice Value 2019-2022

Table 65 Forecast Self-Service Cafeterias: Units/Outlets 2022-2027

Table 66 □Forecast Sales in Self-Service Cafeterias: Number of Transactions 2022-2027

Table 67 □Forecast Sales in Self-Service Cafeterias: Foodservice Value 2022-2027

Table 68 □Forecast Self-Service Cafeterias: % Units/Outlets Growth 2022-2027

Table 69 □Forecast Sales in Self-Service Cafeterias: % Transaction Growth 2022-2027

Table 70 □Forecast Sales in Self-Service Cafeterias: % Foodservice Value Growth 2022-2027

STREET STALLS/KIOSKS IN POLAND

KEY DATA FINDINGS

2022 DEVELOPMENTS

New wave of mobile street stalls/kiosks with attractive designs

Chained street stalls/kiosks performs well as new opportunities are sought

Increased price sensitivity benefits street stalls/kiosks, at the expense of full-service restaurants

PROSPECTS AND OPPORTUNITIES

Strong growth prospects for street stalls/kiosks in the forecast period

Following consumer trends will be important

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

Recovery of tourism will benefit street stalls/kiosks

CATEGORY DATA

Table 71 Street Stalls/Kiosks: Units/Outlets 2017-2022

Table 72 Sales in Street Stalls/Kiosks: Number of Transactions 2017-2022

Table 73 Sales in Street Stalls/Kiosks: Foodservice Value 2017-2022

Table 74 Street Stalls/Kiosks: % Units/Outlets Growth 2017-2022

Table 75 Sales in Street Stalls/Kiosks: % Transaction Growth 2017-2022

Table 76 Sales in Street Stalls/Kiosks: % Foodservice Value Growth 2017-2022

Table 77 GBO Company Shares in Chained Street Stalls/Kiosks: % Foodservice Value 2018-2022

Table 78 GBN Brand Shares in Chained Street Stalls/Kiosks: % Foodservice Value 2019-2022

Table 79 Forecast Street Stalls/Kiosks: Units/Outlets 2022-2027

Table 80 □Forecast Sales in Street Stalls/Kiosks: Number of Transactions 2022-2027

Table 81 □Forecast Sales in Street Stalls/Kiosks: Foodservice Value 2022-2027

Table 82 □Forecast Street Stalls/Kiosks: % Units/Outlets Growth 2022-2027

Table 83 □Forecast Sales in Street Stalls/Kiosks: % Transaction Growth 2022-2027

Table 84 □Forecast Sales in Street Stalls/Kiosks: % Foodservice Value Growth 2022-2027

CONSUMER FOODSERVICE BY LOCATION IN POLAND

KEY DATA FINDINGS

2022 DEVELOPMENTS

Outlets at petrol stations and other travel locations see a fuller recovery

Inflationary pressures and declining purchasing power negatively affect value sales in consumer foodservice through leisure and lodging locations

Growing number of standalone outlets in residential areas

PROSPECTS AND OPPORTUNITIES

Growth across locations, with standalone holding up well

Travel locations to see dynamic growth as petrol stations elaborate on foodservice

CATEGORY DATA

Table 85 Consumer Foodservice by Location: Units/Outlets 2017-2022

Table 86 Sales in Consumer Foodservice by Location: Number of Transactions 2017-2022

Table 87 Sales in Consumer Foodservice by Location: Foodservice Value 2017-2022

Table 88 Consumer Foodservice by Location: % Units/Outlets Growth 2017-2022

Table 89 Sales in Consumer Foodservice by Location: % Transaction Growth 2017-2022

Table 90 Sales in Consumer Foodservice by Location: % Foodservice Value Growth 2017-2022

Table 91 Consumer Foodservice through Standalone: Units/Outlets 2017-2022

Table 92 Sales in Consumer Foodservice through Standalone: Number of Transactions 2017-2022

Table 93 Sales in Consumer Foodservice through Standalone: Foodservice Value 2017-2022

Table 94 □Consumer Foodservice through Standalone: % Units/Outlets Growth 2017-2022

Table 95 □Sales in Consumer Foodservice through Standalone: % Transaction Growth 2017-2022

Table 96 □Sales in Consumer Foodservice through Standalone: % Foodservice Value Growth 2017-2022

Table 97 □Consumer Foodservice through Leisure: Units/Outlets 2017-2022

Table 98 □Sales in Consumer Foodservice through Leisure: Number of Transactions 2017-2022

Table 99 □Sales in Consumer Foodservice through Leisure: Foodservice Value 2017-2022

Table 100 □Consumer Foodservice through Leisure: % Units/Outlets Growth 2017-2022

Table 101 □Sales in Consumer Foodservice through Leisure: % Transaction Growth 2017-2022

Table 102 □Sales in Consumer Foodservice through Leisure: % Foodservice Value Growth 2017-2022

Table 103 □Consumer Foodservice through Retail: Units/Outlets 2017-2022

Table 104 □Sales in Consumer Foodservice through Retail: Number of Transactions 2017-2022

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

| | |
|-----------|--|
| Table 105 | □Sales in Consumer Foodservice through Retail: Foodservice Value 2017-2022 |
| Table 106 | □Consumer Foodservice through Retail: % Units/Outlets Growth 2017-2022 |
| Table 107 | □Sales in Consumer Foodservice through Retail: % Transaction Growth 2017-2022 |
| Table 108 | □Sales in Consumer Foodservice through Retail: % Foodservice Value Growth 2017-2022 |
| Table 109 | □Consumer Foodservice through Lodging: Units/Outlets 2017-2022 |
| Table 110 | □Sales in Consumer Foodservice through Lodging: Number of Transactions 2017-2022 |
| Table 111 | □Sales in Consumer Foodservice through Lodging: Foodservice Value 2017-2022 |
| Table 112 | □Consumer Foodservice through Lodging: % Units/Outlets Growth 2017-2022 |
| Table 113 | □Sales in Consumer Foodservice through Lodging: % Transaction Growth 2017-2022 |
| Table 114 | □Sales in Consumer Foodservice through Lodging: % Foodservice Value Growth 2017-2022 |
| Table 115 | □Consumer Foodservice through Travel: Units/Outlets 2017-2022 |
| Table 116 | □Sales in Consumer Foodservice through Travel: Number of Transactions 2017-2022 |
| Table 117 | □Sales in Consumer Foodservice through Travel: Foodservice Value 2017-2022 |
| Table 118 | □Consumer Foodservice through Travel: % Units/Outlets Growth 2017-2022 |
| Table 119 | □Sales in Consumer Foodservice through Travel: % Transaction Growth 2017-2022 |
| Table 120 | □Sales in Consumer Foodservice through Travel: % Foodservice Value Growth 2017-2022 |
| Table 121 | □Forecast Consumer Foodservice by Location: Units/Outlets 2022-2027 |
| Table 122 | □Forecast Sales in Consumer Foodservice by Location: Number of Transactions 2022-2027 |
| Table 123 | □Forecast Sales in Consumer Foodservice by Location: Foodservice Value 2022-2027 |
| Table 124 | □Forecast Consumer Foodservice by Location: % Units/Outlets Growth 2022-2027 |
| Table 125 | □Forecast Sales in Consumer Foodservice by Location: % Transaction Growth 2022-2027 |
| Table 126 | □Forecast Sales in Consumer Foodservice by Location: % Foodservice Value Growth 2022-2027 |
| Table 127 | □Forecast Consumer Foodservice through Standalone: Units/Outlets 2022-2027 |
| Table 128 | □Forecast Sales in Consumer Foodservice through Standalone: Number of Transactions 2022-2027 |
| Table 129 | □Forecast Sales in Consumer Foodservice through Standalone: Foodservice Value 2022-2027 |
| Table 130 | □Forecast Consumer Foodservice through Standalone: % Units/Outlets Growth 2022-2027 |
| Table 131 | □Forecast Sales in Consumer Foodservice through Standalone: % Transaction Growth 2022-2027 |
| Table 132 | □Forecast Sales in Consumer Foodservice through Standalone: % Foodservice Value Growth 2022-2027 |
| Table 133 | □Forecast Consumer Foodservice through Leisure: Units/Outlets 2022-2027 |
| Table 134 | □Forecast Sales in Consumer Foodservice through Leisure: Number of Transactions 2022-2027 |
| Table 135 | □Forecast Sales in Consumer Foodservice through Leisure: Foodservice Value 2022-2027 |
| Table 136 | □Forecast Consumer Foodservice through Leisure: % Units/Outlets Growth 2022-2027 |
| Table 137 | □Forecast Sales in Consumer Foodservice through Leisure: % Transaction Growth 2022-2027 |
| Table 138 | □Forecast Sales in Consumer Foodservice through Leisure: % Foodservice Value Growth 2022-2027 |
| Table 139 | □Forecast Consumer Foodservice through Retail: Units/Outlets 2022-2027 |
| Table 140 | □Forecast Sales in Consumer Foodservice through Retail: Number of Transactions 2022-2027 |
| Table 141 | □Forecast Sales in Consumer Foodservice through Retail: Foodservice Value 2022-2027 |
| Table 142 | □Forecast Consumer Foodservice through Retail: % Units/Outlets Growth 2022-2027 |
| Table 143 | □Forecast Sales in Consumer Foodservice through Retail: % Transaction Growth 2022-2027 |
| Table 144 | □Forecast Sales in Consumer Foodservice through Retail: % Foodservice Value Growth 2022-2027 |
| Table 145 | □Forecast Consumer Foodservice through Lodging: Units/Outlets 2022-2027 |
| Table 146 | □Forecast Sales in Consumer Foodservice through Lodging: Number of Transactions 2022-2027 |
| Table 147 | □Forecast Sales in Consumer Foodservice through Lodging: Foodservice Value 2022-2027 |
| Table 148 | □Forecast Consumer Foodservice through Lodging: % Units/Outlets Growth 2022-2027 |
| Table 149 | □Forecast Sales in Consumer Foodservice through Lodging: % Transaction Growth 2022-2027 |
| Table 150 | □Forecast Sales in Consumer Foodservice through Lodging: % Foodservice Value Growth 2022-2027 |
| Table 151 | □Forecast Consumer Foodservice through Travel: Units/Outlets 2022-2027 |

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

Table 152 □Forecast Sales in Consumer Foodservice through Travel: Number of Transactions 2022-2027

Table 153 □Forecast Sales in Consumer Foodservice through Travel: Foodservice Value 2022-2027

Table 154 □Forecast Consumer Foodservice through Travel: % Units/Outlets Growth 2022-2027

Table 155 □Forecast Sales in Consumer Foodservice through Travel: % Transaction Growth 2022-2027

Table 156 □Forecast Sales in Consumer Foodservice through Travel: % Foodservice Value Growth 2022-2027

Consumer Foodservice in Poland

Market Direction | 2023-03-13 | 97 pages | Euromonitor

To place an Order with Scotts International:

- ☐ - Print this form
- ☐ - Complete the relevant blank fields and sign
- ☐ - Send as a scanned email to support@scotts-international.com

ORDER FORM:

| Select license | License | Price |
|----------------|--------------------------------|----------|
| | Single User Licence | €1750.00 |
| | Multiple User License (1 Site) | €3500.00 |
| | Multiple User License (Global) | €5250.00 |
| | | VAT |
| | | Total |

*Please circle the relevant license option. For any questions please contact support@scotts-international.com or 0048 603 394 346.

** VAT will be added at 23% for Polish based companies, individuals and EU based companies who are unable to provide a valid EU Vat Numbers.

| | | | |
|---------------|----------------------|-------------------------------|---|
| Email* | <input type="text"/> | Phone* | <input type="text"/> |
| First Name* | <input type="text"/> | Last Name* | <input type="text"/> |
| Job title* | <input type="text"/> | | |
| Company Name* | <input type="text"/> | EU Vat / Tax ID / NIP number* | <input type="text"/> |
| Address* | <input type="text"/> | City* | <input type="text"/> |
| Zip Code* | <input type="text"/> | Country* | <input type="text"/> |
| | | Date | <input type="text" value="2025-05-03"/> |
| | | Signature | <input type="text"/> |

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com