



Consumer Foodservice in Austria

March 2026

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EXECUTIVE SUMMARY

Consumer foodservice remains resilient despite inflationary pressures

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INDUSTRY PERFORMANCE

Environment remains challenging for both consumers and operators

Third-party ordering platforms play central role

Enhanced retail foodservice offerings place pressure on traditional restaurants

WHAT'S NEXT?

Austrian foodservice faces slow growth

Operators will seek to cut costs through automation and focus on easy-to-prepare offerings

Sustainability to drive change across the industry

COMPETITIVE LANDSCAPE

McDonald's leads Austrian consumer foodservice

WGX Noodle-King leads growth with affordable Asian street-style offerings

Challenging operating environment leads to numerous closures

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Cafés/bars struggle amid changing consumer habits

INDUSTRY PERFORMANCE

Cafés/bars register sluggish performance

Juice/smoothie bars lead growth, while specialist coffee and tea shops lose momentum
Third-party delivery platforms help to generate revenues

WHAT'S NEXT?

Decreasing alcohol consumption will limit growth
Delivery offers untapped potential
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KEY DATA FINDINGS

2025 DEVELOPMENTS

Full-service restaurants come under pressure

INDUSTRY PERFORMANCE

Rising costs weigh on full-service restaurants
North American full-service restaurants show strong performance
Full-service restaurants continue to expand delivery offerings

WHAT'S NEXT?

Challenging outlook for full-service restaurants
Delivery will play small, yet growing role for full-service operators
Technological advancements should save costs in the long term

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INDUSTRY PERFORMANCE

Limited-service restaurants outperform their full-service counterparts

Asian limited-service restaurants lead value growth, driven by Noodle King expansion

Delivery drives growth in Austria's limited-service restaurants amid third-party platform dominance

WHAT'S NEXT?

Limited-service restaurants to see solid growth

Delivery will become even more dominated by third-party platforms

Greater adoption of technology across multiple processes

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Structural changes limit growth

INDUSTRY PERFORMANCE

Self-service cafeterias suffer from changing work environments

Self-service foodservice concept appears increasingly outdated

High concentration of eat-in sales

WHAT'S NEXT?

Growth potential for self-service cafeterias remains very limited

Continued focus on on-site dining.

Alternatives to self-service cafeterias will become more prevalent

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KEY DATA FINDINGS

2025 DEVELOPMENTS

Street stalls resonate with price-conscious consumers

INDUSTRY PERFORMANCE

On-the-go lifestyles and downtrading support street stalls

Kiosks are not present in Austria

Sales through delivery remain modest

WHAT'S NEXT?

Street stalls set for growth amid busy lifestyles and continuing price sensitivity
Untapped delivery services offer substantial growth opportunities
Traditional offerings will give way to global flavours

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2025 DEVELOPMENTS

Retail and standalone locations drive growth

INDUSTRY PERFORMANCE

Retail sees increased foodservice investment to boost footfall
Standalone outlets show resilience
Eat-in focus limits growth for retail, leisure and travel foodservice

WHAT'S NEXT?

Retail locations will lead non-standalone growth
Standalone locations will remain largest category
Travel locations could benefit from rising passenger numbers and infrastructure expansion

COMPETITIVE LANDSCAPE

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McDonald's strengthens presence in standalone locations

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