



Consumer Foodservice in Poland

April 2026

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Consumer Foodservice in Poland

EXECUTIVE SUMMARY

Market continues to expand at a robust pace

KEY DATA FINDINGS

INDUSTRY PERFORMANCE

Rates of growth in value sales, transactions and outlet numbers slow moderately
Menu innovation, customer experiences and fulfilment are key points of competition
Investment in and engagement with loyalty programmes remain high

WHAT'S NEXT?

Outlook for consumer foodservice is broadly favourable
Digitalisation and automation set to become more visible across the market
Sustainability concerns will continue to shape company strategies

COMPETITIVE LANDSCAPE

McDonald's maintains market lead in value sales terms
Rex Concepts is the most dynamic performer overall
AmRest expands Starbucks chain into smaller cities

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Independents continue to dominate consumer foodservice in Poland
Adoption of digital tools is strongest among chains

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KEY DATA FINDINGS

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Growth in current value sales and transactions slows as outlet numbers decline

INDUSTRY PERFORMANCE

Independent bars/pubs continue to face significant challenges

Specialist coffee and tea shops is the most dynamic performer in value growth terms
Operators seek to justify price hikes by enhancing in-store experiences

WHAT'S NEXT?

Changing consumer habits will drive more independent bars/pubs out of business
Efforts to improve customer experiences set to intensify
Sustainability and health concerns will continue to influence competitive strategies

COMPETITIVE LANDSCAPE

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KEY DATA FINDINGS

2025 DEVELOPMENTS

Current value sales, transactions and outlet numbers continue to increase steadily

INDUSTRY PERFORMANCE

Rising disposable incomes and growth in inbound tourism bolster trade
Chained Asian full-service restaurants posts fastest current value growth rate
Use of discount promotions remains widespread

WHAT'S NEXT?

Maturity and threat from cheaper categories will temper growth prospects
Investment in digitalisation and automation set to rise
Operators will continue working to reduce their environmental footprint

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Limited-Service Restaurants in Poland

KEY DATA FINDINGS

2025 DEVELOPMENTS

Growth in current value sales, transactions and outlet numbers remains robust

INDUSTRY PERFORMANCE

Chains continue outperform independents

Middle Eastern limited-service restaurants posts highest current value growth

Faster order fulfillment remains a key battleground

WHAT'S NEXT?

Outlook for limited-service restaurants is bright

Digitalisation trend will continue to gain momentum

Sustainability credentials set to become a more important point of competition

COMPETITIVE LANDSCAPE

McDonald's Polska retains commanding overall lead in value sales terms

Rex Concepts PLK is the most dynamic performer

Differentiation strategies help independents weather challenging trading conditions

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DISCLAIMER

Self-Service Cafeterias in Poland

KEY DATA FINDINGS

2025 DEVELOPMENTS

Growth in current value sales and transactions picks up in 2025

INDUSTRY PERFORMANCE

Frequent promotions help to strengthen loyalty among core target demographics

Chained category registers strongest growth in current value terms

Digitalisation remains underdeveloped in self-service cafeterias

WHAT'S NEXT?

Trade set to remain reasonably steady

Operators will continue working to enhance menus and customer experiences

Efforts to improve sustainability credentials likely to intensify

COMPETITIVE LANDSCAPE

Ikea Retail Sp zoo strengthens its leadership

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Street Stalls/Kiosks in Poland

KEY DATA FINDINGS

2025 DEVELOPMENTS

Competitive prices and convenience factor remain key demand drivers

INDUSTRY PERFORMANCE

Menu diversification helps to maintain strong interest among consumers

Independent category grows fastest in value terms

Operators pursue a range of strategies to mitigate cost pressures

WHAT'S NEXT?

Innovation and improvements in quality standards will continue to boost trade
Investment in delivery services and digital tools expected to increase
Sustainability concerns set to become more influential

COMPETITIVE LANDSCAPE

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Dolci Saporì remains the most dynamic performer in value growth terms
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[Consumer Foodservice By Location in Poland](#)

KEY DATA FINDINGS

2025 DEVELOPMENTS

Supply of available locations improves but rental costs remain elevated

INDUSTRY PERFORMANCE

Travel and retail categories are the strongest performers in value growth terms
Standalone category continues to dominate
Pricing, convenience and quality are key battlegrounds in all locations

WHAT'S NEXT?

Consumer foodservice through travel predicted to grow fastest in value terms
Operators in all locations will continue to face cost challenges
Demographic trends set to gain influence over location strategies

COMPETITIVE LANDSCAPE

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