



Consumer Foodservice in Bulgaria

March 2026

Table of Contents

Consumer Foodservice in Bulgaria

EXECUTIVE SUMMARY

Tourism, digitalisation and services add dynamism to consumer foodservice

KEY DATA FINDINGS

INDUSTRY PERFORMANCE

Economic conditions influence foodservice operations and spending

Online and drive-through continue to penetrate the consumer foodservice landscape

Experiential dining and loyalty programmes strengthen consumer engagement

WHAT'S NEXT?

Steady value growth forecast but higher prices represent a challenge

Innovation through expansion, diversification and personalisation

“Greener” operations to emerge more fully

COMPETITIVE LANDSCAPE

Chains and independents foster dual market dynamic

Happy Bar&Grill leverages brand name and good quality, affordable menus

McDonald's expands footprint in key locations

CHANNELS

Chained operators invest in locations and services

Independents show resilience among rising operating pressures

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 Bulgaria

KEY DATA FINDINGS

2025 DEVELOPMENTS

Cafés/bars remains the most popular consumer foodservice category in Bulgaria

INDUSTRY PERFORMANCE

Economic and tourism recovery and strong coffee and socialising cultures underpin growth opportunities

Modern, experiential specialist coffee and tea shops enjoy growing popularity
Expanding menus encourage eat-in trade

WHAT'S NEXT?

Coffee and socialising cultures to provide robust consumption occasions
Takeaway digital ordering to add dynamism to fulfillment
Sustainability and innovation to gain impetus in the forecast period

COMPETITIVE LANDSCAPE

Nedelya leads with a wide presence and affordable, local positioning
Growing presence in key locations boost Costa Coffee
Authentic and community aspects and large footprint maintain independents' dominance

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 Bulgaria](#)

KEY DATA FINDINGS

2025 DEVELOPMENTS

Strong trends visible in full-service restaurants

INDUSTRY PERFORMANCE

Consumers are seeing dining out as an affordable luxury
Bulgarians appreciate experiential dining in Asian full-service restaurants
Delivery emerging as a growth driver

WHAT'S NEXT?

Economic, cultural and dining trends to maintain positive value sales growth
Delivery to continue to develop as a strong fulfillment type
Digitalisation, menu and experiential moves to add dynamism

COMPETITIVE LANDSCAPE

Happy Bar&Grill continues to lead and drive growth
Independents offer authenticity and personalisation to dominate the category

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 Bulgaria

KEY DATA FINDINGS

2025 DEVELOPMENTS

Players cater to local consumers' food and fulfillment needs and preferences

INDUSTRY PERFORMANCE

Resilient demand for a wide range of options

Affordability and convenience boost Middle Eastern and chicken formats

Delivery increases penetration in limited-service restaurants

WHAT'S NEXT?

Positive, but more stable growth projection

Delivery and drive-through to continue to grow in popularity

Bulgarian consumers' preferences to influence innovation

COMPETITIVE LANDSCAPE

McDonald's leverages brand popularity and consumer trust to stay ahead of the field

KFC focuses on local tastes and service speed to make gains

Independents hold sway but chains gain ground

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 Bulgaria

KEY DATA FINDINGS

2025 DEVELOPMENTS

Self-service cafeterias retain popularity with dynamism visible

INDUSTRY PERFORMANCE

Young adult audience adds dynamism to self-service cafeterias

Convenience and value for money positioning draw consumers

Self-service cafeterias appeal as an affordable dining experience

WHAT'S NEXT?

Players to continue to embrace a younger audience

Eat-in to remain the core type and focus of fulfillment

Sustainability is gaining weight in the strategies of self-service cafeterias

COMPETITIVE LANDSCAPE

BMS Group leverages value, familiarity and high-traffic locations to retain leadership

Ikea Restaurant enjoys appeal as a unique dining experience

Independents dominate through community presence and daily routine familiarity

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 Bulgaria

KEY DATA FINDINGS

2025 DEVELOPMENTS

Consumers appreciate a wide and varied choice of units and menus

INDUSTRY PERFORMANCE

Sales growth despite a drop in outlet numbers

Independents gain from specialisation in popular, authentic street food items

Takeaway is the core fulfillment type

WHAT'S NEXT?

Expansion of contemporary offer to draw younger consumer base

App-based ordering to suit high-traffic locations

Smart kiosks to add dynamism to the landscape

COMPETITIVE LANDSCAPE

Fornetti is a widely available, reliable and popular chain

Go Grill taps into evolving consumer preferences in high-traffic areas to gain ground

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 Bulgaria](#)

KEY DATA FINDINGS

2025 DEVELOPMENTS

Foodservice locations see opportunities and challenges

INDUSTRY PERFORMANCE

Retail foodservice benefits from high foot traffic

Standalone dominates, particularly in major cities

Online delivery continues to increase penetration in foodservice

WHAT'S NEXT?

Foodservice operators are tapping into growing opportunities in leisure locations

Standalone outlets to remain most accessible for everyday dining

Varying challenges and opportunities depending on the location type

Demographic changes to increase focus on tourism and older consumer groups

COMPETITIVE LANDSCAPE

Retailers benefit as consumers look for dining that fits with shopping routines

International chains focus on prime locations

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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