



Limited-Service Restaurants in Bulgaria

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Limited-Service Restaurants in Bulgaria - Category analysis

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

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Consumer Foodservice in Bulgaria - Industry Overview

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

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Chained operators invest in locations and services

Independents show resilience among rising operating pressures

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