Consumer Foodservice in Finland

March 2026

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Cafés show the smallest decline as price points and demand drivers differ
Loyalty schemes support value-for-money perceptions and repeat visits

WHAT'S NEXT?

A return to growth depends heavily on economic recovery and consumer sentiment
Takeaway remains more relevant than delivery for most cafés/bars formats
Sustainability could regain visibility if trading conditions improve

COMPETITIVE LANDSCAPE

Espresso House leads through network scale despite recent softness
NoHo Partners stands out through acquisition-driven momentum
Independent operators dominate, though ownership structures blur the split

CATEGORY DATA

DISCLAIMER

Full-Service Restaurants in Finland

KEY DATA FINDINGS

2025 DEVELOPMENTS

Cautious consumer spending limits growth despite stable demand for dining occasions

INDUSTRY PERFORMANCE

Economic weakness restrains growth in full-service restaurants
Middle Eastern concepts grow fastest from a small base
Lunch offers and multifunctional concepts support value-for-money positioning

WHAT'S NEXT?

Economic recovery and tourism growth will shape future performance
Eat-in continues to dominate fulfilment
Sustainability remains relevant but less prominent in industry debate

COMPETITIVE LANDSCAPE

S Group maintains leadership through scale and strong consumer loyalty
Pancho Villa stands out for continued expansion
Independent operators continue to dominate the category

CATEGORY DATA

Limited-Service Restaurants in Finland

Self-Service Cafeterias in Finland

KEY DATA FINDINGS

2025 DEVELOPMENTS

Economic pressures weigh on lunch spending despite steady demand for affordable meals

INDUSTRY PERFORMANCE

Economic pressures reduce demand for workplace lunches

Independent operators perform slightly better amid varied market conditions

Lunch benefits and buffet formats reinforce value-for-money positioning

WHAT'S NEXT?

Economic recovery and workplace attendance will shape future demand

Eat-in remains dominant despite some takeaway and delivery

Reducing food waste remains a key sustainability priority

COMPETITIVE LANDSCAPE

S Group maintains leadership through its ABC gas station network

Biltema expands rapidly through retail-based cafeteria concept

Chained operators dominate but independent outlets remain important locally

CATEGORY DATA

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DISCLAIMER

Street Stalls/Kiosks in Finland

KEY DATA FINDINGS

2025 DEVELOPMENTS

Weather conditions and economic pressures contribute to category decline

INDUSTRY PERFORMANCE

Weather conditions and economic weakness drive declining sales

Independent operators show slightly more resilience

Takeaway remains the dominant fulfilment format

WHAT'S NEXT?

Weather patterns and niche positioning shape future prospects

Takeaway and eat-in formats remain dominant

Sustainability continues to influence consumer expectations

COMPETITIVE LANDSCAPE

Froneri leads through its extensive Pingviini kiosk network

Independent operators show more stable performance

Independent operators maintain dominance in the category

CATEGORY DATA

DISCLAIMER

Consumer Foodservice By Location in Finland

KEY DATA FINDINGS

2025 DEVELOPMENTS

Location performance varies widely depending on outlet type and local conditions

INDUSTRY PERFORMANCE

Travel locations show the strongest growth among non-standalone outlets

Standalone outlets see only marginal growth

Shopping and foodservice continue to overlap in many locations

WHAT'S NEXT?

Travel locations expected to remain the most dynamic

Standalone locations expected to grow broadly in line with the industry

Increasing overlap between retail and foodservice

Demographic changes reshape location dynamics

COMPETITIVE LANDSCAPE

Market leadership difficult to define across location categories

Standalone locations characterised by high fragmentation

CATEGORY DATA