



**Euromonitor
International**

Full-Service Restaurants in Bulgaria

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Table of Contents

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 1 - Full-Service Restaurants by Category: Units/Outlets 2020-2025

Table 2 - Sales in Full-Service Restaurants by Category: Number of Transactions 2020-2025

Table 3 - Sales in Full-Service Restaurants by Category: Foodservice Value 2020-2025

Table 4 - Full-Service Restaurants by Category: % Units/Outlets Growth 2020-2025

Table 5 - Sales in Full-Service Restaurants by Category: % Transaction Growth 2020-2025

Table 6 - Sales in Full-Service Restaurants by Category: % Foodservice Value Growth 2020-2025

Table 7 - GBO Company Shares in Chained Full-Service Restaurants: % Foodservice Value 2021-2025

Table 8 - GBN Brand Shares in Chained Full-Service Restaurants: % Foodservice Value 2022-2025

Table 9 - Forecast Full-Service Restaurants by Category: Units/Outlets 2025-2030

Table 10 - Forecast Sales in Full-Service Restaurants by Category: Number of Transactions 2025-2030

Table 11 - Forecast Sales in Full-Service Restaurants by Category: Foodservice Value 2025-2030

Table 12 - Forecast Full-Service Restaurants by Category: % Units/Outlets Growth 2025-2030

Table 13 - Forecast Sales in Full-Service Restaurants by Category: % Transaction Growth 2025-2030

Table 14 - Forecast Sales in Full-Service Restaurants by Category: % Foodservice Value Growth 2025-2030

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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

CHANNELS

Chained operators invest in locations and services

Independents show resilience among rising operating pressures

MARKET DATA

Table 15 - Units, Transactions and Value Sales in Consumer Foodservice 2020-2025

Table 16 - Units, Transactions and Value Sales in Consumer Foodservice: % Growth 2020-2025

Table 17 - Consumer Foodservice by Independent vs Chained by Type: Units/Outlets 2025

Table 18 - Consumer Foodservice by Independent vs Chained: % Foodservice Value 2020-2025

Table 19 - Sales in Consumer Foodservice by Food vs Drink Split: % Foodservice Value 2020-2025

Table 20 - Sales in Consumer Foodservice by Food vs Drink Split by Type: % Foodservice Value 2025

Table 21 - Sales in Consumer Foodservice by Location: % Foodservice Value 2020-2025

Table 22 - Sales in Consumer Foodservice by Fulfillment: % Foodservice Value 2020-2025

Table 23 - GBO Company Shares in Chained Consumer Foodservice: % Foodservice Value 2021-2025

Table 24 - GBN Brand Shares in Chained Consumer Foodservice: % Foodservice Value 2022-2025

Table 25 - GBN Brand Shares in Chained Consumer Foodservice: Units/Outlets 2025

Table 26 - Forecast Units, Transactions and Value Sales in Consumer Foodservice 2025-2030

Table 27 - Forecast Units, Transactions and Value Sales in Consumer Foodservice: % Growth 2025-2030

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SOURCES

Summary 1 - Research Sources

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