



Euromonitor
International

Consumer Foodservice in Bulgaria

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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

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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

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Nedelya leads with a wide presence and affordable, local positioning
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Authentic and community aspects and large footprint maintain independents' dominance

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[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
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COMPETITIVE LANDSCAPE

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Limited-Service Restaurants in Bulgaria

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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

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KFC focuses on local tastes and service speed to make gains

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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

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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

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[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

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