



Consumer Foodservice in Hungary

March 2026

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Consumer Foodservice in Hungary

EXECUTIVE SUMMARY

Continuing resilience in challenging environment

KEY DATA FINDINGS

INDUSTRY PERFORMANCE

Value sales increase, though profit margins remain under pressure

Delivery online ordering now crucial revenue stream

Experience and loyalty programmes increasingly important

WHAT'S NEXT?

Outlook uncertain

Space for innovation, though traditional still dominates

Increasing focus on sustainability

COMPETITIVE LANDSCAPE

McDonald's continues to lead

Local chain Simon's Burger gains value share

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Juice/smoothie bars gains most value share

Eat-in still dominant, though home delivery growing revenue stream

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KEY DATA FINDINGS

2025 DEVELOPMENTS

Mixed performance in 2025

INDUSTRY PERFORMANCE

Polarising effect, with community restaurants in decline

Asian restaurants register highest value growth

Home delivery continues to grow, but with challenges

WHAT'S NEXT?

Positive outlook over forecast period

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Sluggish economy supports limited-service restaurants

Burger limited-service restaurants perform strongly

Takeaway and online ordering and delivery continue to register growth

WHAT'S NEXT?

Continuing healthy value growth over forecast period

Stronger emphasis on eat-in

Increasing emphasis on quality

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Affordable, healthy food supports sales

INDUSTRY PERFORMANCE

Positive value growth, though facing increasing competition from limited-service restaurants

Office workers and shoppers key consumer base

Limited demand for online delivery

WHAT'S NEXT?

Moderate constant value growth over forecast period

Hone delivery gains some ground

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COMPETITIVE LANDSCAPE

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2025 DEVELOPMENTS

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Healthy value growth in 2025

Chains making gains

Value sales supported by on-the-go consumption

WHAT'S NEXT?

Muted constant value growth over forecast period
Growth in eat-in options
Space both for chained and independent outlets to grow, with differing focuses

COMPETITIVE LANDSCAPE

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[Consumer Foodservice By Location in Hungary](#)

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2025 DEVELOPMENTS

Retail locations benefit from delivery platforms and food courts

INDUSTRY PERFORMANCE

Retail best performing location for non-standalone
Positive increase in value sales for standalone
Delivery online ordering continues to gain value share

WHAT'S NEXT?

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Changing demographics influence choice of location

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