



Euromonitor
International

Consumer Foodservice By Location in Poland

April 2026

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KEY DATA FINDINGS

2025 DEVELOPMENTS

Supply of available locations improves but rental costs remain elevated

INDUSTRY PERFORMANCE

Travel and retail categories are the strongest performers in value growth terms

Standalone category continues to dominate

Pricing, convenience and quality are key battlegrounds in all locations

WHAT'S NEXT?

Consumer foodservice through travel predicted to grow fastest in value terms

Operators in all locations will continue to face cost challenges

Demographic trends set to gain influence over location strategies

COMPETITIVE LANDSCAPE

Zabka remains the top player in non-standalone locations

McDonald's still the leading company in standalone locations

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Consumer Foodservice in Poland - Industry Overview

EXECUTIVE SUMMARY

Market continues to expand at a robust pace

KEY DATA FINDINGS

INDUSTRY PERFORMANCE

Rates of growth in value sales, transactions and outlet numbers slow moderately

Menu innovation, customer experiences and fulfilment are key points of competition

Investment in and engagement with loyalty programmes remain high

WHAT'S NEXT?

Outlook for consumer foodservice is broadly favourable

Digitalisation and automation set to become more visible across the market

Sustainability concerns will continue to shape company strategies

COMPETITIVE LANDSCAPE

McDonald's maintains market lead in value sales terms

Rex Concepts is the most dynamic performer overall

AmRest expands Starbucks chain into smaller cities

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Adoption of digital tools is strongest among chains

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