



Foodservice Market Structure 2025/26 - 2030

Germany | Poland

Understand, Forecast & Target the Foodservice Market

Two standalone country reports covering market structure, key players, trends and five-year forecasts

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In 2025, **Germany's foodservice market** generated sales estimated at **EUR 88.2 billion**. Nearly 70% of these sales are held by independent and self-operated foodservice providers compared to chains and contract caterers. By the end of 2026, despite consumer savings and continued weak footfall, the overall foodservice market in Germany is expected to grow in volume of meals & snacks served by **1.2% compared with 2025**, and by an even **higher rate between 2026 and 2030**.

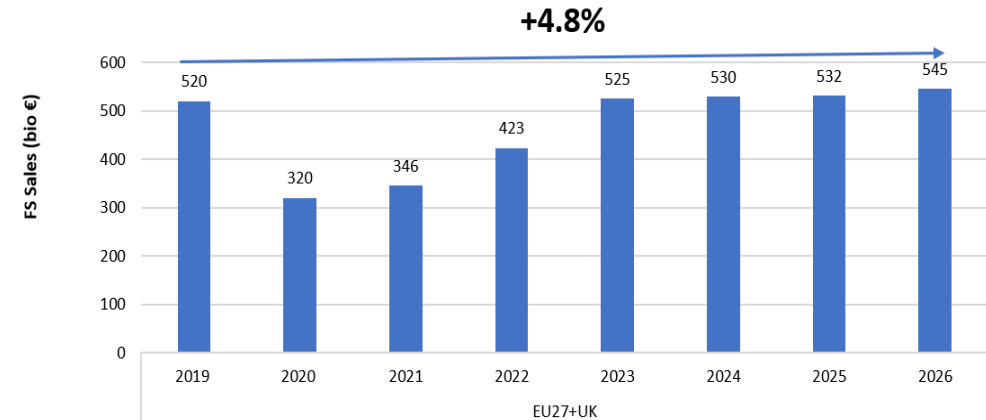
The estimated value of the foodservice market in Poland is **EUR 32.8 billion**, which is nearly three times smaller than that of Germany; however, it is expected to experience **much more dynamic growth rates up to 2030**.

In the **EU27+UK**, the foodservice market returned to its 2019 level in 2023. Overall, its value growth is estimated at **+4.8% in 2026 compared to 2019**. 2024 and 2025 were particularly bad for footfall; however, there has been a clear improvement since the beginning of **2026**, largely thanks to several measures to **reduce the VAT rate applied to the foodservice industry** in several countries.

Foodservice traffic across Europe is still lower than pre-COVID levels. However, this decline has been somewhat counterbalanced by an **increase in average meal checks**, which has helped maintain overall turnover. The reduction in customer footfall is influenced by several main factors, including the **ongoing cost-of-living crisis** and **rising prices** that continue to strain household spending on foodservice. Additionally, current **geopolitical tensions** have further weakened **consumer confidence**.

How can we mitigate the effects of low consumer confidence and rising market uncertainties? Considering that **social foodservice** typically offers lower prices than commercial foodservice, could this channel be positioned for more dynamic growth rates in the coming years? GIRA is optimistic that the foodservice market will begin to **recover, potentially as early as 2026**. However, during these still uncertain times, it is crucial to develop a deeper understanding of how various foodservice segments, outlet concepts, and players will evolve and recover. Key questions include how quickly this recovery will happen and which players are likely to succeed or struggle. In addition, what is the projected growth of the sector over the next five years, and which key trends will shape each market segment through to 2030?

Foodservice Sales' Evolution 2026e/2019 - Total EU27 + UK



Source: Gira compilation

- EU27+UK Foodservice sales in 2025 only **2.3% higher than 2019**
- But **+4.8% in 2026e** compared to 2019
- **Differences** between countries and foodservice segments

Gira's **Foodservice Market Structure** research is delivered through **two standalone country reports** covering **Germany** and **Poland**.

- Each report provides country-specific analysis of the foodservice market, including the market structure, key figures, trends, forecasts and analysis of the main foodservice segments and players.
- The two reports are available individually or together as a Germany + Poland Joint Offer.

Country-specific analysis of the Foodservice Market Structure

Two standalone reports: Germany | Poland

The same analytical framework is applied separately to each country, with country-specific data, segmentation and insights, where relevant.

- **Structure of the foodservice market: number of foodservice outlets, volume of meals/snacks served, foodservice market in value**
 - Turnover of meals/snacks served per year (net EUR), annual F&B purchases (net EUR), food cost/Cost Of Goods Sold (COGS) expressed as a percentage.
- **Channels: focus on social and commercial foodservice and their respective segments**
 - **Social foodservice**
 - Business & Industry (B&I): employee feeding restaurants
 - Education: school and university canteens (both state and private)
 - Healthcare & Welfare: meals/snacks served in hospitals and care homes (both state and private)
 - **Commercial foodservice**
 - Full-Service Restaurants (FSR), FSR including Self-Service Restaurants (SSR)
 - Quick-service restaurants (QSR) that include segments such as burger restaurants, bakeries/sandwich shops, bars, cafés and coffee shops, and other types of QSR concepts specific to each country (convenience stores in Poland)
 - Hotels and other accommodation
 - Other segments depending on the countries: Transport foodservice, Leisure & Event catering.
- **Players:**
 - **Market share** in value of organised/chained foodservice players vs independents within each segment
 - **Social foodservice:** Contract caterers
 - **Commercial foodservice:** Restaurant (FSR/SSR) and QSR chains, hotel chains & groups and other commercial foodservice groups (Transport specialists, Leisure & Event players).
- **Time period:**
 - 2025/26e
 - Forecasts for volume and key trends through to 2030.

Each standalone **Country Report** uses the same analytical framework

- Market structure and key figures
- Social foodservice
- Commercial foodservice
- Key players and market shares
- Trends and qualitative insights
- 2026–2030 forecasts
- Strategic recommendations

Comprehensive **Excel tables** are provided separately for Germany and Poland, consolidating the key market data in a structured and accessible format for operational purposes.

Foodservice Market Structure 2025

	Structure of the foodservice sector			Organised foodservice market****		Structure of foodservice purchases	
Foodservice Segments	Number of foodservice outlets	Number of meals served (mio/year)	Turnover of meals per year (EUR mio)	EUR million	Market share by value	Food cost / Cost of Goods Sold (COGS)	Annual food purchases (EUR mio)
Social foodservice					%	%	
of which Business & Industry*					%	%	
of which Education					%	%	
of which Health & Welfare					%	%	
Commercial foodservice					%	%	
of which Full-Service Restaurants (FSR)**					%	%	
of which Quick-Service Restaurants (QSR)					%	%	
of which Burger QSR					%	%	
of which Bakery / Sandwich					%	%	
of which Bars & cafés / Coffee shops					%	%	
of which Other snack-based outlets***					%	%	
of which Hotels & other accommodation					%	%	
TOTAL FOODSERVICE					%	%	

* Other captive segments such as the armed forces and prisons are included / ** Full-Service Restaurants include Self-Service Restaurants (SSR). If possible, supply of additional segments specific to the country / *** Other snack-based outlets are generally specific to the country (for example "Imbissstuben" in Germany etc.) / **** Mainly contract caterers / Restaurant and QSR chains, hotel chains, transport, leisure & events groups

NB: Meals include snacks / Vending machines are excluded from the scope of the study

Source: Gira compilations

Chapter 1: Synthesis

- **Main results in summary tables with key figures by country**
 - The market structure of foodservice, 2025
 - Top organised foodservice players, 2025
 - Leading contract caterers in social foodservice and groups & chains in commercial foodservice
 - 2026-2030f evolution in volume of meals & snacks served
- **Qualitative insights**
 - Trends in the foodservice sector by country
 - Strategic recommendations social foodservice, 2025/26 – 2030f
 - Strategic recommendations commercial foodservice, 2025/26 – 2030f

Chapter 2: Social foodservice by country

- **Trends in the social foodservice sector**
- **Main contract catering companies in social foodservice, 2025**
- **2026-2030f evolution in volume in social foodservice**
 - **Business & Industry**
 - Definition of the Business & Industry segment
 - The structure of the Business & Industry segment, 2025
 - Outsourcing in the Business & Industry segment, 2025
 - 2026-2030f evolution in volume in the Business & Industry Segment
 - Threats & opportunities Business & Industry, 2025/2026 – 2030f
 - **Education**
 - Definition of the Education segment
 - The structure of the education segment, 2025
 - Outsourcing in the education segment, 2025
 - 2026-2030f evolution in volume in the education segment
 - Threats & opportunities Education, 2025/2026 – 2030f
 - **Health & Welfare**
 - Definition of the Health & Welfare & Other segments
 - The structure of the health & welfare & other segments, 2025
 - Outsourcing in the health & welfare & other segments, 2025
 - 2026-2030f evolution in volume in the health & welfare & other segments
 - Threats & opportunities Health & Welfare, 2025/2026 – 2030f

Chapter 3: Commercial foodservice by country

- **Trends in the commercial foodservice sector**
- **Main chains & groups in commercial foodservice, 2025**
- **2026-2030f evolution in volume in commercial foodservice**
 - **Full-Service Restaurants**
 - Definition of the Full-Service Restaurants' segment
 - The structure of the Full-Service Restaurants' segment, 2025
 - Chains in the Full- and Self-Service Restaurants' segment, 2025
 - 2026-2030f evolution in volume in the Full-Service Restaurants' segment
 - Threats & opportunities Full-and Self-Service Rest., 2025/2026 – 2030f
 - **Quick-Service Restaurants**
 - Definition of the Quick-Service Restaurants' segment
 - The structure of the Quick-Service Restaurants' segment, 2025
 - Chains in the Quick-Service Restaurants' segment, 2025
 - Depending on the countries: sub-segmentation:
 - Chains in the Burger QSR segment, 2025
 - Chains in the Bakery / Sandwich segment, 2025
 - Chains in the Bars & Cafés / Coffee shops' segment, 2025
 - Convenience stores' segment, 2025
 - Chains in the Other snack-based outlets' segment, 2025
 - 2026-2030f evolution in volume in the QSR segment
 - Threats & opportunities QSR, 2025/2026 – 2030f
 - **Hotels & Other accommodation**
 - Definition of Hotels & Other Accommodation
 - The structure of the hotels & other accommodation segment, 2025
 - Chains & groups in the hotels & other accommodation segment, 2025
 - 2026-2030f evolution in volume in the hotels & other accommodation segment
 - Threats & opportunities hotels & other lodging, 2025/2026 – 2030f
 - **Depending on the countries: Transport, Leisure & Events**
 - Definition of Transport, Leisure & Events' segment
 - The structure of the Transport, Leisure & Events' segment, 2025
 - Chains & groups in the Transport, Leisure & Events' segment, 2025
 - 2026-2030f evolution in volume in the Transport, Leisure & Events' segment

The same structural analysis is applied separately to Germany and Poland, with country-specific segmentation and content where relevant.

GIRA's methodology is applied separately to Germany and Poland to ensure country-specific findings and forecasts.

Desk research

- Official statistics, trade press, internet resources, company websites etc.
- GIRA utilised its comprehensive understanding of the market, drawing on its prior analyses and reports on the foodservice industry.

Interviews

- **Around 15-20 qualitative telephone interviews per country** were conducted with key foodservice players and experts.
 - Large contract caterers, restaurant and QSR chains, other commercial foodservice groups, as well as independent operators
 - Foodservice distributors
 - Broadline distributors: full-line and specialised delivered wholesalers, cash & carry, logistics providers
 - Food industrial manufacturers, FMCG companies
 - Chefs' associations and other expert sources.
- **Main topics** of the interviews covered:
 - Interviewee opinions on the evolution of foodservice equipment rate and footfall, the average prices for snacks and meals, the food cost (COGS) possibly in comparison to pre-COVID 2019?
 - How foodservice currently "markets" its offering to consumers, its evolution in terms of foodservice concepts, dishes offered, prices - what will change significantly?
 - How foodservice operators are cutting their costs, and what measures they are implementing to achieve this?
 - How foodservice operators are adapting to reduced consumer disposable income?
 - Changing consumer demands and the evolution of consumption behaviours by client type, foodservice versus retail, where prices are lower?
 - The need for innovative products, the impact and evolution of home delivery, and take-away concepts?
 - etc...
- The **research and key interviews** have been **conducted by GIRA's experienced team of consultants**
 - **Muriel Régnier** is the **project manager and is in charge of the German and Polish report**
 - She started her expertise in foodservice and food industry market research and consultancy in Europe in 1995. She has a deep and Europe-wide knowledge of foodservice operators and their supply chains for over 30 years.
 - GIRA's consultants are experienced professionals with strong interviewing skills with foodservice executives:
 - **Malgorzata Falkowska** - GIRA consultant for the **Polish foodservice market**, native Polish speaker (over 30 years of expertise)

Timing

- Foodservice Market Structure in **Germany** - published **June 2026**
- Foodservice Market Structure in **Poland** - published **June 2026**.

Subscription Options

	Germany (Standalone Report)	Poland (Standalone Report)	Germany + Poland (Joint Offer)
Country Reports	€5,000	€5,000	€9,000
Deliverables	One PDF report + one-hour webinar	One PDF report + one-hour webinar	Two PDF reports + Two one-hour webinars

- **Each country report** is available separately for **€5,000** (before any applicable taxes), including a follow-up webinar
- The **Germany + Poland joint offer** provides access to both standalone reports for **€9,000**.
- Payment of 50% upon signing the formal agreement and 50% upon delivery of the report.

Reports

- Published in **English**.
- Each Foodservice Market Structure country report exceeds 60 pages.
- Clients receive an electronic copy of the report in searchable and printable PDF format.
- Hard copies are available at an additional cost of 400 EUR per full report.

Follow-up Webinar

- A dedicated webinar is provided for each client, presenting the key findings and recommendations, with an opportunity to exchange views and engage in a Q&A session tailored to your specific business situation.

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☐ **Germany + Poland (Joint Offer)** **EUR 9,000**

Includes both standalone country reports

Date of subscription (dd/mm/yyyy)

Signature:

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