



HORECA MARKET IN POLAND 2025

MARKET ANALYSIS AND DEVELOPMENT
FORECASTS FOR 2025-2030



Main objective

Providing a comprehensive description of the HoReCa market, including a breakdown into segments.

Additional objectives

The specific objectives of the research and analysis carried out for the report were to identify:

- segments of the HoReCa market
- key macroeconomic, demographic, demand-side, supply-side, and technological factors and trends affecting the HoReCa market
- value of HoReCa market segments
- number of food service establishments by market segment and subsegments
- behaviour and preferences of HoReCa users
- socio-demographic profile of customers by type of foodservice establishment
- market segments with the best prospects

What information can be found in the report?

- market value in 2021-2024
- **market structure** in 2021-2024 by segments
- macroeconomic, demographic, demand-side, supply-side, and technological factors affecting the market
- **scale of using HoReCa services** by Poles over the last year
- **major players** in the HoReCa market, also by segment
- **forecasts until 2030** for:
 - HoReCa market
 - main segments of the HoReCa market
 - number of food service establishments
 - number of food service establishments in the main segments of the HoReCa market
 - number of food service establishments in the Re subsegments
 - changes in the prices of food services and other macroeconomic and demographic factors



TIME SPAN: 2021-2024

FORECAST HORIZON: 2025-2030

GEOGRAPHIC COVERAGE: Poland

SCOPE

- Ho (hotel food service)
- Re (restaurant market), including its subsegments:
 - restaurants
 - pizzerias
 - fast food bars
 - cafes
 - drink bars
- Ca (catering)

SUBJECT MATTER

- market value
- breakdown of the total market value by segments and subsegments
- forecasts for:
 - entire market
 - each market segment
 - each market subsegment
- major players
 - in the entire market
 - in each market segment
 - by specific market subsegments
 - profiles of the top market players



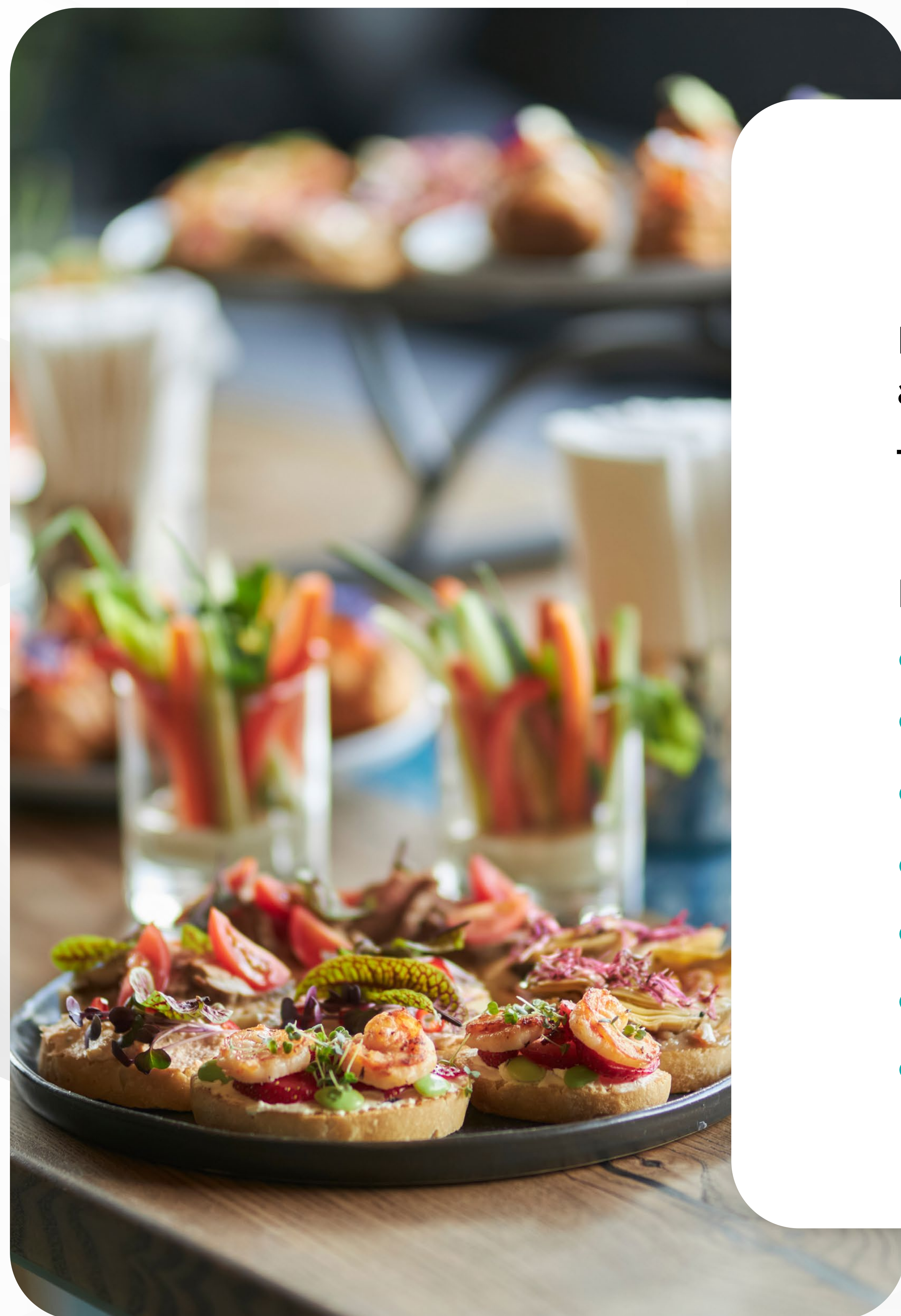
FORECASTS

For the report, long-term market development forecasts were prepared using econometric models and a 10-year time series.

The forecasts cover the period 2025-2030.

In addition to projections for the market value and its segments and subsegments, the report also presents forecasts for selected macroeconomic indicators, including:

- per capita GDP and GDP real growth rate
- overall CPI and price index for food services
- average annual LFS unemployment rate and real change of average monthly gross wage in Poland
- real change in disposable income of Polish households and private consumption
- number of Poland's residents and share of each demographic group
- change in the number of domestic and foreign tourists
- passenger traffic at airports: number of arrivals and departures



PROFILE OF USERS OF HORECA SERVICES IN POLAND

- use of food services in 2024, by type of service
- impact of inflation on purchasing decisions and the use of HoReCa services, including a breakdown by Ho, Re, and Ca
- frequency of eating out in 2024, by type of establishment
- factors considered when choosing a food service establishment
- reasons for eating out
- use of food delivery services, including the socio-demographic profile of delivery users, ordering frequency and methods, most popular platforms, most frequently ordered dishes, and reasons for ordering delivery
- meals and beverages ordered in food service establishments
- favourite cuisine types
- using different diets
- interest in vlogs and restaurant reviews and their impact on the decision to visit an establishment
- eating breakfast out and using lunch offers
- differences in HoReCa service usage and attitudes by generation
- socio-demographic profiles of visitors to restaurants, pizzerias, quick service bars, cafés, pubs, and hotel restaurants
- tourist trips in 2024
- use of personalised diet catering (boxed diet plans)





NUMBER OF FOODSERVICE VENUES, HOTELS, AND CATERING COMPANIES

The report also presents key parameters related to the HoReCa market that influence its development, including:

- the number of foodservice venues in Poland, broken down by segments and subsegments (hotel restaurants, restaurants, pizzerias, quick-service bars, cafés, alcohol-serving bars)
- the number of foodservice venues by type: chain vs. independent
- the number of hotels
- the number of catering companies, by employment size

FOODSERVICE BUSINESS OPERATIONS

- change in sales in foodservice venues by type, and in catering companies
- value and number of receipts, by type of venue
- average monthly turnover, by type of venue
- main barriers to running and growing a foodservice business



Why to buy this report, i.e. what important questions it answers:

- What is the value of the HoReCa market in Poland?
- What are the value and development forecasts for each market segment in the next 5 years?
- How do Poles use HoReCa services?
- What are the prevailing trends in the HoReCa market and its segments?
- What is the impact of high inflation on the HoReCa market in Poland?
- What is the real growth rate for the HoReCa market in Poland?

Together with the report, we provide **the most important data in the Excel spreadsheet for individual aggregation.**



We are one of the leading research and analytics companies in Poland!

As **PMR Market Experts**, we help our Clients to obtain and analyse data, enabling them to better understand market processes, plan strategic and operational actions, and ultimately develop their business.

We boast **30 years of experience** and a **team of nearly 100 experts**. In our reports, we use secondary data combined with proprietary primary databases and qualitative and quantitative research.

We provide **market analyses for four main sectors:**

- construction,
- retail,
- healthcare and pharmaceuticals,
- IT and telecommunications.

We also prepare **customised research projects** focused on the area chosen by the Client. In addition, we offer **consultancy services** combining different areas, i.e. marketing research, market sizing, forecasting, and sales management.





RETAIL

MARKET ANALYSIS AND 5-YEAR DEVELOPMENT FORECASTS

- Retail market of **home appliances, electronics and digital media** in Poland
- **Food to Go** retail market in Poland
- **Cosmetics** retail market in Poland
- **DIY** retail in Poland
- **Home furnishings** retail market in Poland
- **HoReCa** market in Poland (additional data update: March, September, December)
- **Grocery** retail market in Poland
- **Clothing and footwear** retail market in Poland
- **Sports goods** retail market in Poland
- **Children's products** retail market in Poland
- **Online retail** market in Poland (additional data update: March)
- **Diet catering** market in Poland
- **Non-food discounters** market in Poland
- **Pet care and products** market in Poland
- **HoReCa supply** market in Poland
- **Non-food discounters** market in Poland
- **Diet catering** market in Czech Republic
- **Clothing and footwear** retail market in Czech Republic
- Weekly: **PMR Retail Insight** (Poland, Hungary, Romania, Slovakia, Czech Republic)

NOVELTIES

Forecasting methodology

The class and type of the developed **econometric models** are selected according to the **characteristics of the data analysed**. In practice, models using **multiple regression** (the least squares method) and **autoregression** (ARIMA, VAR) are the most common. We use both **primary variables** and their **transformations** (e.g. logarithms) to capture the relevant relationships.

The **final market value forecasts** are not just based on a single best model but are a **weighted average of forecasts** from a selected set of best models. The weights are selected based on model fit indices. This procedure makes it possible to consider **more factors** influencing market development, hence **improving the forecast precision**.

When developing the **final forecasts**, we take into account not only the **statistical quality of the models** (model adjustment to empirical data, normality and homoscedasticity of residuals, statistical significance of structural parameters) but also their **consistency** with market knowledge and **qualitative information** gathered by PMR's analytical team.

The models use data on industry sectors, macroeconomic indicators and demographics, as well as the results of our analyses. Most often, there are **60-80 types of indicators** considered.



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KONTAKT:

Iwona Pacyniak

Business Development Manager

tel.: +48 721 710 501

iwona.pacyniak@pmrmarketexperts.com



BIURO

Królewska 57
30-081 Kraków, Polska



KONTAKT

tel.: +48 609 290 093
+48 782 011 000

sales@pmrcorporate.com
info@pmrcorporate.com



WWW

www.pmrmarketexperts.com
www.mypmr.pro

