



HORECA SUPPLY MARKET IN POLAND 2025

MARKET ANALYSIS AND DEVELOPMENT
FORECASTS FOR 2025-2030





Main objective

To provide a comprehensive description of the market for HoReCa supply of food products, including a breakdown by segment and product category.

Additional objectives

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

- value of food products supply to the individual HoReCa market segments
- value of supply of the individual product categories
- key macroeconomic, demographic, demand-side, supply-side and technological factors and trends affecting the market for HoReCa supply of food products
- cost structure, including of food products purchases, in food service establishments and catering companies
- sources of products supply to establishments
- criteria for the selection of product suppliers to food service establishments
- profile of a perfect supplier

What is included in the report?

- **market value** in 2021-2025
- **market structure** in 2021-2025 by HoReCa market segment
- **market structure** in 2021-2025 by product category
- **macroeconomic, demographic, demand-side and supply-side factors** affecting the market
- **forecasts up to 2030** for:
 - value of the market for HoReCa supply of food products
 - value of food products supply to the individual HoReCa market segments
 - value of food products supply by product category
 - number of food service establishments
 - price changes, including prices of food services and food products (among other things, dairy products, meat, vegetables, fruit, cereal products, alcoholic and non-alcoholic beverages)
 - 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 segment and subsegment
- breakdown of the total market value by product category
- market development forecasts



PRODUCT CATEGORIES

- **alcoholic and non-alcoholic beverages:**
 - alcoholic beverages (beer, wine, spirits and other)
 - non-alcoholic beverages (mineral waters, juices, coffee, tea, soft drinks)
- **fresh food products:**
 - dairy
 - meat, cold cuts, fish
 - vegetables
 - fruit
- **frozen food products**
 - frozen dishes and semi-finished products
 - frozen fish and seafood
 - frozen chips
 - ice cream and ice desserts
 - frozen fruit and vegetables
 - frozen meat
- **other food products**
 - flour, pasta, groats, sugar, breadcrumbs, etc.
 - bakery products
 - oils, butters, other fats
 - spices
 - ketchup, mustard, mayonnaise, other sauces
 - canned vegetables, pickles, olives and the like
 - croissants and pastries made of puff pastry and semi-puff pastry
 - sweets, snacks



FORECASTS

For the purpose of the report, long-term development forecasts were prepared using econometric models and historical time series. The forecasts cover the period 2025-2030.

The report also includes forecasts for 2025-2030 for selected demographic and macroeconomic indicators, including:

- GDP per capita and real GDP growth rate
- overall CPI and price index for food services
- food prices by product category (e.g. meat, vegetables, fruit, cereals, alcoholic and non-alcoholic beverages)
- average annual LFS unemployment rate and real change in 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
- number of companies active in Poland
- change in the number of domestic and foreign tourists
- passenger traffic at airports: number of arrivals and departures



OPERATION OF FOOD SERVICE COMPANIES

- change in sales in different types of food service establishments and catering companies
- value and number of receipts by type of establishment
- average monthly revenue by type of establishment
- holding of a licence to sell alcohol by type of establishment
- costs of operating a food service establishment by type of cost
- cost structure for purchasing food products, broken down into:
 - water, juices, alcoholic and non-alcoholic beverages
 - fresh food products
 - frozen food products
 - other food products
- breakdown of beverage purchase costs by alcoholic and non-alcoholic beverages
- breakdown of purchase costs of fresh, frozen and other food products by category
- location and sources of supply in 18 product categories
- profile of a perfect supplier
- key barriers to operation and business development



Why buy this report, i.e. what important questions does it answer?

- What is the value of the market for HoReCa supply of food products in Poland?
- What is the value of food products supply to the individual market segments and forecasts for its growth over the next five years?
- What is the value of HoReCa supply of selected food product categories and projections for its development over the coming years?
- What is the cost structure of food product purchases by food service establishments?

Together with the report, we provide the **most important data in an 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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