



HORECA MARKET IN POLAND 2023

MARKET ANALYSIS AND DEVELOPMENT FORECASTS FOR 2023-2028

IMPACT OF INFLATION AND WAR IN UKRAINE

Findings from the report



Like in 2021, in 2022 a substantial majority of Poles used food services, and the value of the HoReCa market in Poland recorded a double-digit growth in nominal terms. Positive influences on the market included the recovery of tourism and the good condition of the labour market. However, 2022 was a period of rapidly rising inflation, so the real growth rate of the HoReCa market value was lower than that in nominal terms.

According out forecast, after its 2022 record spike, inflation will remain at a similar (in average annual terms) level in 2023, while the food service price index will be growing faster than inflation overall.

Although inflation has a restraining effect on the HoReCa market in Poland and, based on our cyclical surveys, food services are one of the first categories on which Poles reduce spending when prices rise, the consumers will not completely give up going out to food service establishments and, in particular, will not completely abandon tourist trips.

Rising prices are also affecting the supply side of the market, with food service companies citing high costs among the biggest barriers to doing business (71% in PMR's survey conducted in April/May 2023). Despite this, there will be new players entering the market in 2023 and in the coming years.

According to PMR forecasts, between 2023 and 2028 the highest compound annual growth rate (CAGR) will be recorded in the hotel food service segment, still driven by its recovery from a low base, while the lowest figure will be observed in the restaurant segment, which will remain the key segment for the HoReCa market.



About the report

Main objective

To provide a comprehensive description of the HoReCa market, also broken down by its segments.

Additional objectives

The studies and analyses were carried out for the Report with the specific aims 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
- sources of products supply to premises
- criteria for the selection of product suppliers to food service establishments
- market segments with the best prospects

What information can be found in the report?

- market value in 2019-2022
- market structure in 2019-2022 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 2028 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
 - changes in the prices of food services and other macroeconomic and demographic factors

Subject matter and scope

Time span: 2019-2022

Forecast horizon: 2023-2028

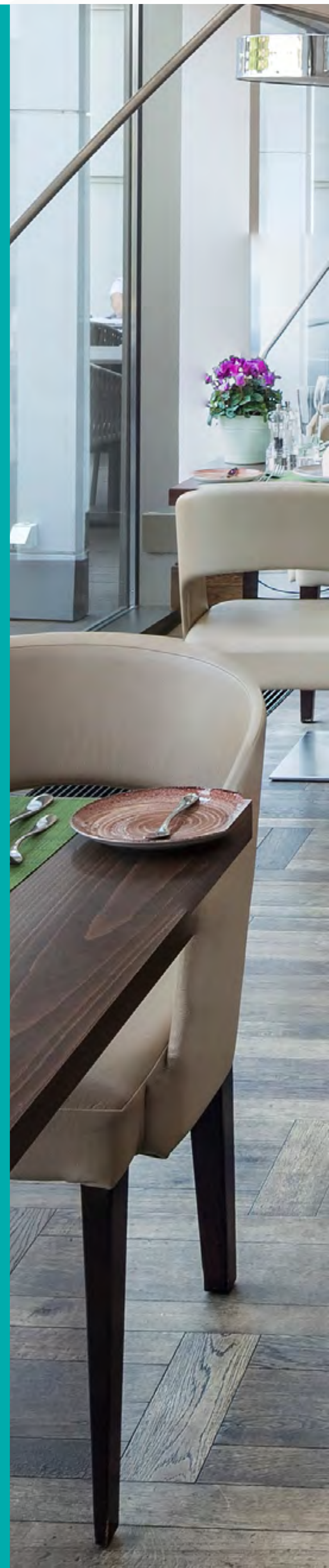
Geographic coverage: Poland

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



Additional information

FORECASTS

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

The forecasts cover the period 2023-2028.

In addition to projections for the market value and its segments and subsegments, the report also presents forecasts for 2023-2028 for selected demographic and 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

NUMBER OF FOOD SERVICE ESTABLISHMENTS, HOTELS AND CATERING COMPANIES

The report presents also the key parameters affecting the HoReCa market, including:

- number of food service establishments in Poland, by segments and subsegments (hotel restaurants, restaurants, pizzerias, fast food bars, cafes, drink bars)
- number of chain and non-chain food service establishments
- number of hotels
- number of catering companies, by headcount



Additional information

PROFILE OF USERS OF HORECA SERVICES IN POLAND

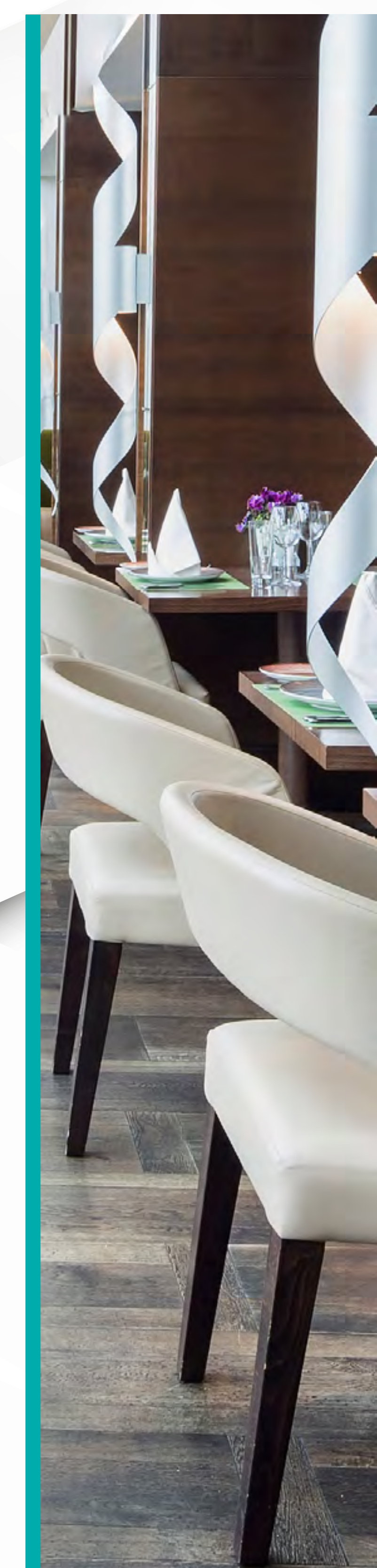
- use of food services in 2022
- impact of inflation on purchasing decisions and the use of HoReCa services
- frequency of eating out in 2022, by type of establishment
- factors considered when choosing a food service establishment
- meals and beverages ordered in food service establishments in 2022
- favourite cuisine types
- using different diets
- use of delivery services and food ordering portals and types of dishes ordered in 2022
- interest in vlogs and restaurant reviews and their impact on the decision to visit an establishment
- tourist trips in 2022
- use of personalised diet catering (boxed diet plans)

SURVEY OF FOOD SERVICE COMPANIES – OVERVIEW OF THE POLISH MARKET

- time of operating in the market, by type of establishment
- location of the establishment
- amenities and standards implemented in the premises, by type of establishment
- value and number of receipts, by type of establishment
- change in the sales level at the premises in 2022, by type of establishment
- expected change in the sales level in the current year, by type of establishment
- operating costs, by type of cost and type of establishment
- cuisine served, by type of establishment
- holding of a licence to sell alcohol, by type of licence and type of establishment
- age of customers visiting the establishment
- key barriers to operations and expanding the business

SURVEY OF FOOD SERVICE COMPANIES – SUPPLIES

- location and sources of supply in 18 product categories
- largest suppliers, by type of establishment
- key criteria for selecting a supplier, by type of establishment
- method of delivery of supplies, by type of establishment



Benefits of purchasing the Report

The Report answers, for instance, the following questions:

- What is the value of the HoReCa market in Poland?
- What are the value and development forecasts for each market segment in the next five 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.





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