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FORMAT BRIEF

SWISS FOODSERVICE REPORT · OCTOBER 2026

Bakery, pastry & **tea rooms**

+9% / -12%

Bakery tea rooms in Switzerland grew by 9% between 2018 and 2024, while bakery shops without seating fell by 12%[1]

2 in 3

Two thirds of bakery products are sold by retailers and discounters: against them, bakeries compete with unique products and the experience they can offer in their shop[2]

+50%

On average, a bakery with a tea room sells 50% more than a bakery with a shop only[3]

+44%

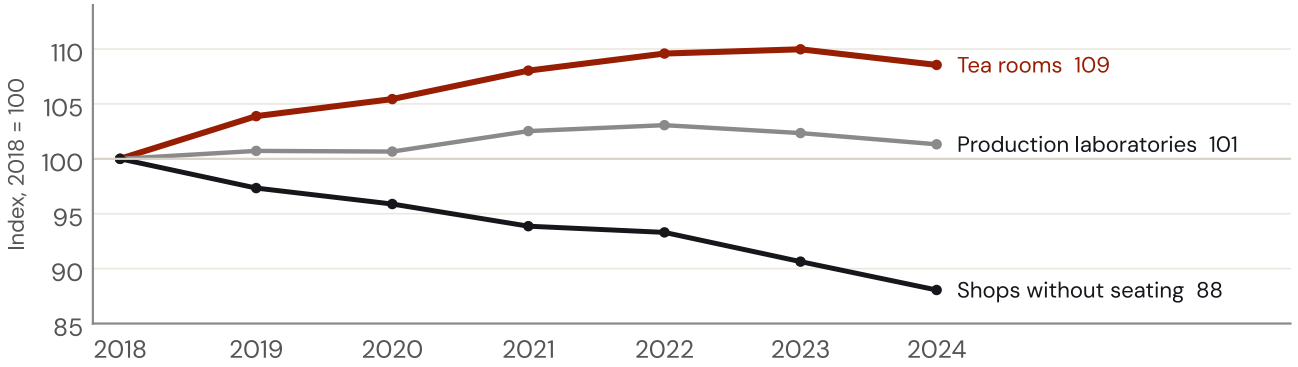
Branches of SBC member bakeries over twenty years, while their points of sale fell by 18%: the sector is moving into networks[4]

CONSUMER / RETAIL / HOSPITALITY

01
Fewer shops, **more tea rooms**

Between 2018 and 2024 the number of bakery shops fell by 12%, while the number of production laboratories stayed almost stable, a trend that shows two changes: the concentration of the sector, with laboratories serving several shops, and a shift in the type of outlets. Over the same years tea rooms, bakery shops that also offer seating and drinks with their own products, grew by 9%, in line with cafés (+13%, estimate) (Figure 1).[1] This seems to be mostly a response to competition: since about two thirds of bakery products are sold through large retailers, discounters and other channels,[2] brands need unique product ranges and a better in-shop experience to succeed.

FIGURE 1 **Bakery and pastry: outlets by type, index 2018 = 100**



Establishments, December. Laboratories (NOGA 107100), shops without seating (472401, incl. pastry and confectionery shops), tea rooms (472402). 2024 adjusted for the reclassification of 19 tea rooms in St. Gallen and Vaud. Source: BFS STATENT.

The shift is toward a format able to capture more consumption occasions in the same outlet, at breakfast and at lunch, at the table or to take away, while adding offers that increase the average ticket, such as hot beverages, which on average cost about 8% of their selling price.[5] Across food service, the take-away and delivery turnover of restaurants, cafés and fast food grew by 53% between 2018 and 2024,[6] and a tea room can capture part of this growth with the same products sold to go. Demand for breakfast and lunch offers is also increasing, with more than half of bakery visits in Germany combining food and a drink.[7,8]

As it happens for other types of food service, the growth of tea rooms concentrates in the large cities: Zurich and Geneva account for two thirds of the new outlets, while other cantons, such as Valais, Neuchâtel and Jura, show a negative growth path (Table 1).

TABLE 1 **Tea rooms by canton, largest changes, 2018–2024**

Canton	2018	2024	Change
Zurich	80	109	**+29**
Geneva	117	131	**+14**
St. Gallen	48	57	**+9**
Vaud	123	131	**+8**
Jura	15	11	**–4**
Neuchâtel	12	7	**–5**
Valais	69	64	**–5**
Switzerland	**772**	**838**	**+66**

Establishments, NOGA 472402. 2024 adjusted for the reclassification of 19 tea rooms in St. Gallen and Vaud. Source: BFS STATENT.

1 BFS, Statistics on enterprise structure (STATENT), establishments and FTE, NOGA 107100, 472401, 472402, 2018–2024.
2 Swiss Bakers' Association (SBC), Branchenspiegel 2018 des Bäcker-Konditor-Confiseur-Gewerbes, 2018.
5 Promptus, Branchenkennzahlen Gastronomie Schweiz (data: GastroSuisse Branchenspiegel 2026), 6 August 2026.
6 ESTV, VAT statistics, NOGA 561001 (restaurants, cafés and fast food), turnover at the reduced take-away rate, 2018–2024.
7 Lebensmittel Praxis (S. Klopsch), Backwarenmarkt 2026: Warum Snacks, Brötchen und Aufbackwaren boomen (Circana), Germany, 15 September 2026.
8 food-service.de, Verbraucherpanel CREST: Bäcker setzen auf Kaffee (NPD Group, Germany, data 2017), 6 March 2018.

02
More shops bring volume, **tea rooms bring margin**

Bakeries with their own laboratory follow two growth paths, a network of shops supplied by the same laboratory or a wider offer in the existing shops, with seating and drinks, or a mix of the two. Each of them affects costs and margins differently (Table 2).[3]

TABLE 2 **Bakeries and confectioneries by business type: reference figures**

2026 (estimate)	Laboratory + single shop	Laboratory + selling branches*	Laboratory + tea room
Sales, CHF thousand per year	1,270	2,750	1,910
Goods, % of sales	30.5–31	30–30.5	28.5–29
Staff, % of sales	46.5–48	49–50.5	49–50.5
Rent, % of sales	5.5	6.5	5.5
Overhead expenses, % of sales	13–14.5	10.5–11.5	10.5–12
Profit before depreciation, CHF thousand per year	15–55	25–110	65–125
Profit before depreciation, % of sales	**1–4.5%**	**1–4%**	**3.5–6.5%**

*On average, sales equal to about 2.2 single shops. Tea room: SBC category "mit Café". Ranges: higher and lower growth of costs since 2018; the lower costs give the higher profit. Overhead expenses: energy, maintenance, administration and other operating costs. Source: SBC, Branchenspiegel 2019; 2026: Linearis estimate (sales prices, raw materials, wages and rents updated with BFS indices, volumes unchanged).

Centralizing production is the trend of the sector, but of the three main cost items, only overhead expenses decrease as a share of sales when the laboratory serves more shops:

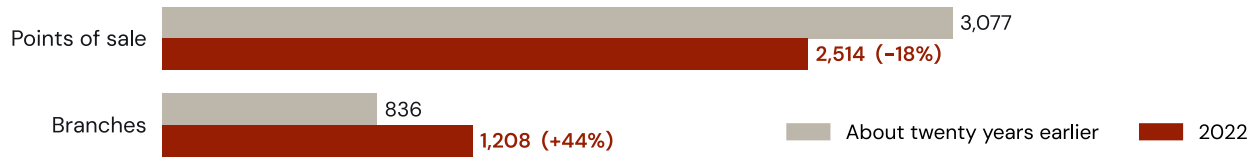
- Goods, about 30% of sales: in a small network the purchasing advantage is limited.
- Staff, about 50%. Production is manual work, and each shop needs its own sales staff.
- Overhead expenses, about 10.5–14.5%: energy, maintenance and administration are the only costs spread over more volume, but the saving is taken by the staff and rent of the extra shops.

Compared with a laboratory with a single shop, a laboratory with a tea room spends a larger share on staff, as it serves at the table, and a smaller share on goods (Table 2). The difference in profit comes from the higher sales and the economies of scale, as overhead expenses take about 10.5–12% of revenues in a tea room against about 13–14.5% in a laboratory with a single shop.

Seating comes with extra revenue opportunities, but it requires extra staff and space. A tea room employs about 1.7 FTE more than a shop without seating, which brings a cost of roughly CHF 105,000 a year considering the standard salaries, and seats need more floor area, with an impact on rent.[1] A lunch menu costs CHF 18.33 at the median in cafés and bakeries, against 23.75 in restaurants and 18.75 in fast food and take-away.[9]

Sales volume is therefore what makes the difference, and it has driven a growing concentration among the companies: over twenty years SBC members' points of sale fell from 3,077 to 2,514, while branches rose from 836 to 1,208.[3,4]

FIGURE 2 **Bakeries of SBC members: points of sale and branches**



About 2002 and 2022. Source: SBC annual report 2022, in Blick, 30 August 2023.

3 Swiss Bakers' Association (SBC/BCS), Branchenspiegel 2019; 2026 values: Linearis estimate with BFS price and wage indices. Almost a third of the bakeries in the SBC sample turn over less than CHF 750,000, and many cannot pay the owner an adequate salary.
4 Blick (J.-C. Raemy), Mehr Kosten, weniger Nachwuchs: Diese Bäckereien sind in den letzten Jahren verschwunden, 30 August 2023 (data: SBC annual report 2022).
9 Lunchmenu.ch, price indices, September–October 2026.

03
Bakery chains **and pastry chains**

For the bakery chains the tea room has become the main format: about half of their outlets in the ten largest cities have one, and most chains concentrate them in one city, within reach of their laboratory, as Sutter Begg in Basel, Schwyter in St. Gallen or Walter Buchmann in Zurich. The chains without tea rooms rely either on traffic, like Brezelkönig with its kiosks in stations, or on a concept clear enough to build the brand on its own, like Äss-Bar, which sells the previous day's products of partner bakeries at reduced prices (Table 3).[10,11]

TABLE 3 **Bakery and pastry chains in the ten largest cities, 2026**

Brand	Type	Outlets in Switzerland	In the ten largest cities	Outlets with a tea room	Notes
Brezelkönig (Valora)	Bakery	50+	28	0 of 28	Pretzel kiosks, mostly in stations; dough made centrally in Emmenbrücke
Sutter Begg	Bakery	27	17	11 of 17	
Paillasse (Aimé Pouly)	Bakery	19	16	n/a	
Schwyter	Bakery	18	12	10 of 12	
Hug	Bakery	18	11	7 of 11	Production sold to Jowa (Migros) in 2017
Bakery Bakery	Bakery	11	11	7 of 11	Founded in 2019; about five openings a year
Walter Buchmann	Bakery	11	11	8 of 11	
Äss-Bar	Bakery	10	10	0 of 10	Sells the previous day's products of partner bakeries at reduced prices
Jung	Bakery	9	9	1 of 9	
Steiner Flughafebeck	Bakery	11	8	8 of 8	
Kuhn Back & Gastro	Bakery	17	7	7 of 7	
St. Jakob Beck & Kafi	Bakery	8	7	7 of 7	
Pougnier	Bakery	8	6	3 of 6	
Wüst	Bakery	16	6	2 of 6	
Fleur de Pains	Bakery	28	5	n/a	
Reinhard	Bakery	8	5	0 of 5	
Macchi	Bakery	7	5	0 of 5	
Sterchi	Bakery	6	5	1 of 5	
Stocker	Bakery	5	5	1 of 5	
Sprüngli	Pastry	32	19	1 of 19	Five shops in Zurich main station
Bachmann	Pastry	26	16	5 of 16	Zurich Airport opened in 2025
Eichenberger	Pastry	6	5	4 of 5	

Chains with at least five outlets in the ten largest cities. Tea room: outlet with seating, as described on the chain's website; outlets in stations are counted without tea room, since the website does not say if there are seats; n/a: the website does not distinguish tea rooms and shops. Sutter Begg: one outlet on the Novartis campus counted as a shop. Brezelkönig: outlets in Switzerland as given by the chain (50+). Source: market screening, 2026; notes: sources 12–16.

The logistics of the distribution and the management of the operational aspects are the drivers that decide the set-up and the expansion of a chain. A dense network in one city allows fresh deliveries several times a day and makes the brand known in its area, but ties growth to the region. Preparing the products centrally and baking them in the outlet, as Bakery Bakery and Brezelkönig do, allows smaller outlets and sites further from the laboratory, stations included,[12,14] but every outlet needs its own oven and staff to finish the products, with a direct impact on the set-up and operating costs. In every model the core of sales has to be the chain's own products, because selling products made by others cuts the margin.[17]

Traffic sites bring volume, but also dependence on the station's owner: at Reinhard in Bern the station outlet contributes about a third of the company's result, and in 2024 it had to close and move because of the works in the station.[18]

10 Linearis, market screening of the ten largest Swiss cities, 2026 (chain websites and OpenStreetMap).
11 Zürich Tourismus, Äss-Bar, zuerich.com, accessed 25 October 2026.
12 Luzerner Zeitung, Brezelkönig baut Produktionsstätte in Emmenbrücke aus, 2019.
13 zentralplus, Luzerner Bäckerei Hug wird zum Migros-Betrieb, 19 June 2017.
14 Blick (M. Kälin), Diese Bäckerei eröffnet 5 Filialen pro Jahr, obwohl vielerorts der Ofen ausgeht, 16 June 2026.
15 Horizont, Sprüngli: Hingucker-Store im Hauptbahnhof Zürich, 17 March 2024.
16 zentralplus, Confiserie Bachmann expandiert in Zürich weiter, 30 June 2025; Confiserie Bachmann expandiert weiter, 10 October 2025.
17 Bakeries with a large share of products bought from others (SBC: mit Handelswaren) had a profit before depreciation between -1.5% and 0.8% of sales in 2013–2017, the lowest of all business types (SBC, Branchenspiegel 2018).
18 Plattform J (B. Abegglen), Filiale im Bahnhof Bern: Bäckerei Reinhard muss schliessen, 3 July 2024.

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