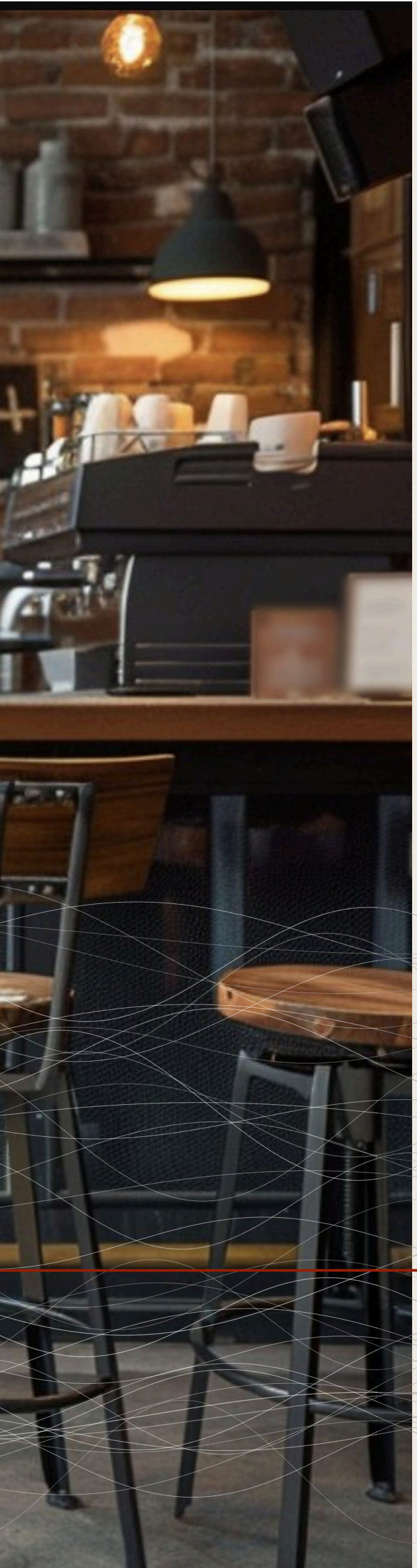


Linearis

SWISS FOODSERVICE REPORT · OCTOBER 2026

Cafés

+13%

Cafés in Switzerland, 2018–2024, the second fastest-growing format after fast food[1]

73% / 2%

Coffees sold to go: kiosk-café against a restaurant a few metres away, in the same station[2]

≈25%

Share of food in the sales of a coffee chain: the drink brings the customer, food raises the ticket[3]

+45%

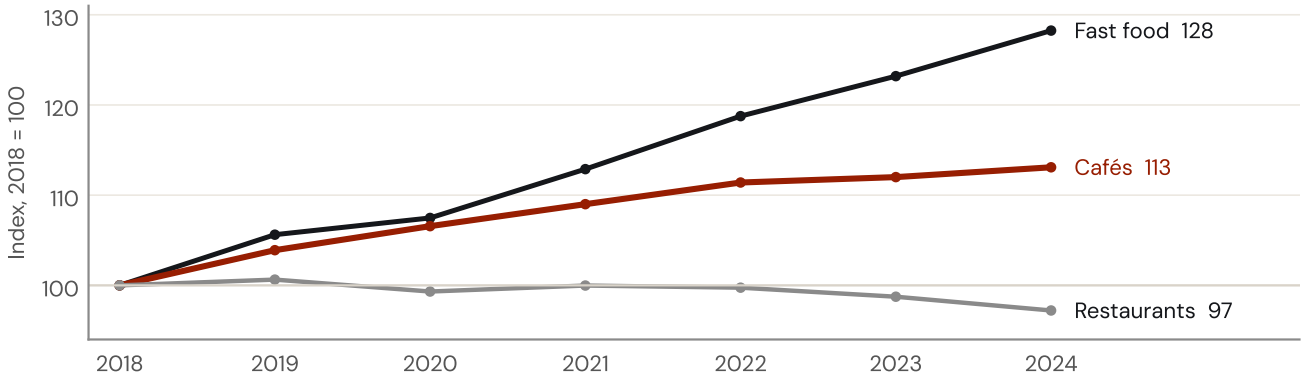
Price of a café crème: coffee shop against kiosk, at the same site[4]

CONSUMER / RETAIL / HOSPITALITY

01
Cafés grow in the large cities, **with coffee sold to go in the morning**

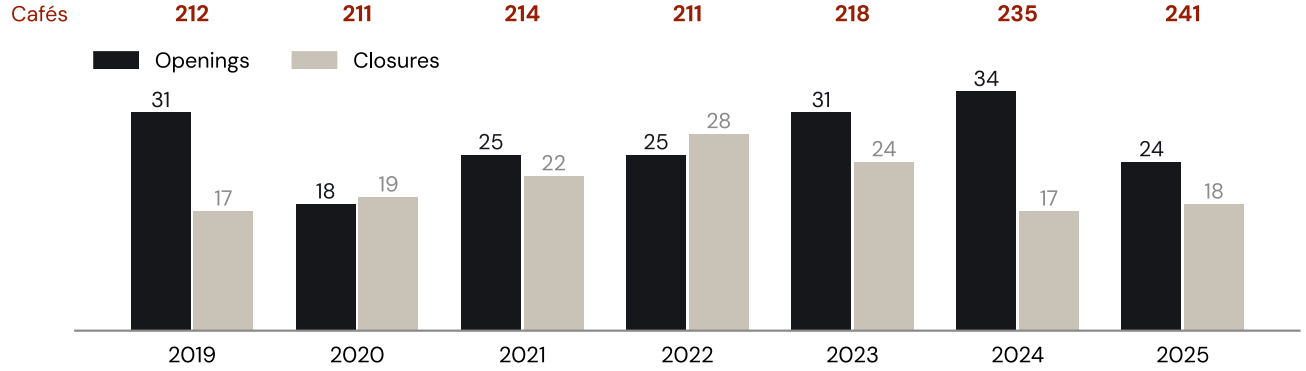
In Switzerland cafés are the second fastest-growing segment after fast food (Figure 1),[1] but across the country the growth has slowed, leaving the increase mainly in the large cities: in Zurich about thirty open every year, and their number rose by 14% between 2022 and 2025, even faster than fast food (Figure 2).[5] While some shopping streets in the city centres have more empty shops than a year ago, such as rue de Bourg in Lausanne and Gerbergasse in Basel,[6] new cafés, brunch places and bars open in the neighbourhoods close to the centre, where rents are often lower:[7] Wiedikon, the Langstrasse district and Zurich West in Zurich, Eaux-Vives in Geneva, Sous-Gare in Lausanne, Länggasse and Breitenrain in Bern, St. Johann and Feldbergstrasse in Basel, the Bruchquartier in Lucerne and Lagerplatz in Winterthur.[8]

FIGURE 1 **Cafés, fast food and restaurants in Switzerland, index 2018 = 100**



Establishments in Switzerland, December. Split between restaurants, cafés and fast food within NOGA 561001 estimated from OpenStreetMap shares; part of the change between formats may come from how venues are recorded there. Source: BFS STATENT.

FIGURE 2 **Cafés in the city of Zurich: openings, closures and total, 2019–2025**



2019–2025: 188 openings and 145 closures; cafés from 198 at the end of 2018 to 241 at the end of 2025. Licensed establishments of the City of Zurich, classified as cafés by matching with OpenStreetMap.

1 BFS, Statistics on enterprise structure (STATENT), NOGA 561001, 2018–2024; split between restaurants, cafés and fast food estimated with OpenStreetMap shares.
2 Badischer Bahnhof, Basel: the kiosk-café sold 73% of its coffees to go, the restaurant a few metres away just over 2%; the format tells customers how to buy. Wirteverband Basel-Stadt, Eine gute Milliarde Umsatz mit «Coffee to go», 10 October 2017.
3 Starbucks, Investor Day 2026, corrected transcript, 29 January 2026.
4 Zurich Airport, July 2025: café crème CHF 3.20–3.90 at kiosks and convenience counters (Coop to go, Press & Books, Brezelkönig), CHF 4.60–5.50 in coffee shops (Caffè Spettacolo, Roots, Züri Kafi, Starbucks); about 45% more at the central values. 20 Minuten (comparison by Tages-Anzeiger), 29 July 2025.
5 City of Zurich, Stadtpolizei, Gastwirtschaftsbetriebe der Stadt Zürich (open data), January 2026; cafés identified by Linearis by matching with OpenStreetMap.
6 CBRE, Understanding Retail Destinations, data as of March 2026: vacancy from 5.6% to 7.4% on rue de Bourg and from 2.8% to 4.2% on Gerbergasse, March 2025 – March 2026.
7 Linearis, market screening, 2026 (asking rents of commercial ground floors); zentralplus, Das Luzerner Bruchquartier, 11 June 2019.
8 Articles on city neighbourhoods: Swiss Magazine (2026); The AU Review (2025); Mona Mona (2023); Blick / Handelszeitung (2023); von Bartha (2022); Der Internaut (2020); zentralplus (2019); ZHAW Impact (2019).

02
To go **and at the table**

Sales of a café peak on average at two moments of the day, the morning and the break. In the morning the item mostly sold is coffee, largely in its to go version, and usually at stations or in places on the way to work.[9] Hot drinks are often paired with food if the site and the offering are properly designed. At the Badischer Bahnhof in Basel, the kiosk-café sold 73% of its coffees to go, while the restaurant a few metres away sold just over 2%. In the city centre, the Confiserie Bachmann sold 40% of its coffees to go between 6 and 9 a.m., when people pass on their way to work.[2] In Zurich, Basel and Lausanne, ViCAFE's espresso bars serve mostly to go through a window, open at 6.30 or 7 a.m. and close between 3 and 6 p.m.[10]

On average coffee is the product with the best margin: coffee and tea cost about 8% of their sales in goods,[11] and a kilo of coffee, which makes about 70–80 café crèmes, is sold for up to about CHF 400 at the price of a café crème at the table.[12] Nevertheless, since a coffee alone makes a small ticket, unless the value of the beverage is increased through specialties or recipes, it is usually food that makes the revenues: in established coffee chains food can reach a quarter of sales.[3]

The VAT difference for products sold on the go (2.6% against 8.1%) adds margin to the cost savings that come with take-away: the service at the table requires a waiter to take orders, and space for a seat and a table, which impacts on rent (Table 1). On the other hand, table service can give further earning opportunities: guests at the table often pair food with beverages,[13] and table service brings customers in day moments when the on-the-go traffic is limited. The combination of seating and take-away pays better when the guest orders at the counter and brings the order directly to the table, as at Starbucks, ViCAFE or Caffè Spettacolo.

TABLE 1 **What a café crème at CHF 4.80 leaves for the other costs, CHF**

	To go	At the table
Price net of VAT	4.68	4.44
Coffee and milk	-0.38	-0.38
Cup and lid	-0.10 to -0.25	–
Barista, 1 minute	-0.55	-0.55
Table service, 2–3 minutes	–	-1.10 to -1.65
Seat, 2 m²	–	-0.23 to -0.34
Left for the other costs	**about 3.5**	**about 1.5–2.2**

Estimate.[14]

The format of the outlet and the type of experience offered to customers shape the value customers perceive, sustaining the difference between a coffee prepared by a barista and one from a standard machine, which at the same site goes up to +45% (Table 2).[4,15]

TABLE 2 **Price of a coffee by format at the same site, 2025, CHF**

Site	Kiosk or retailer counter	Coffee shop or bar	Difference
Zurich Airport, café crème	3.20–3.90 (kiosk, Coop to go, Press & Books, Brezelkönig)	4.60–5.50 (Caffè Spettacolo, Roots, Züri Kafi, Starbucks)	about +45%
Zurich main station, espresso	3.70 (Coop Sapori d'Italia)	4.40 (Caffè Spettacolo), 5.40 (Time Lounge & Bar)	+19% to +46%

Difference at the central values. Sources: 20 Minuten (comparison by Tages-Anzeiger), July 2025; Nau.ch, March 2025.

9 Linearis, market screening of the ten largest Swiss cities, 2026 (chain websites, OpenStreetMap and opening hours).
10 ViCAFE, Espresso Bars, company website, accessed 19 October 2026; Linearis, market screening, 2026.
11 Promptus, Branchenkennzahlen Gastronomie Schweiz (data: GastroSuisse Branchenspiegel 2026), 6 August 2026.
12 Dose of 12–15 g of coffee for a café crème (Kaffeemacher, Café crème vom Feinsten, 20 January 2017); median price CHF 4.80 at the table (Lunchmenu.ch, 2026), VAT included.
13 food-service.de, Verbraucherpanel CREST: Bäcker setzen auf Kaffee (NPD Group, Germany, data 2017), 6 March 2018.
14 Estimate, café crème at CHF 4.80: VAT 2.6% to go, 8.1% at the table; coffee and milk 8% of the price; cup CHF 0.10–0.25; staff CHF 0.55 a minute (CHF 61,000 per FTE); 1 minute of barista, plus 2–3 minutes of table service; seat of 2 m² at the Zurich median rent, room occupied 40% of 12 hours, 20–30 minutes per guest.
15 Nau.ch, Deutscher empört sich über Kaffee-Preise am HB Zürich, 4 March 2025.

03
Retailers, café chains **and the brand**

Retailers are in general among the largest food-service operators, and compete with take-away and coffee, especially at stations: Migros and Coop are the second and third food-service companies in Switzerland by sales, after McDonald's, and Valora, with k kiosk, Avec, Brezelkönig and Caffè Spettacolo, mostly in stations, is the eighth.[16]

Among the main coffee chains, the ones with many outlets near the main station belong to large groups, as Caffè Spettacolo (Valora) and Starbucks; the others, both espresso bars that sell mostly to go, as ViCAFE, and coffee shops with seating, as MAME, Boréal or Rent a Barista, are often concentrated in one geographical area, which makes operations easier (Table 3).[9]

TABLE 3 **Main coffee chains in the ten largest cities, 2026**

Brand	Outlets in Switzerland	In the ten largest cities	Where	Model	Within 400 m of the main station
ViCAFE	19	18	Zurich 15, Basel 2, Lausanne 1	Small espresso bars, mostly to go	3 of 18
Caffè Spettacolo (Valora)	27	10	Zurich 4, Lausanne 2, four other cities	Espresso bars, mostly in stations	6 of 10
Joe & The Juice	11	10	Zurich 7, Geneva 2, Lucerne 1	Juice and food bar with seating	1 of 10
MAME	7	6	Zurich 4, Geneva 2	Speciality coffee shop with seating	0 of 6
Adrianos	6	6	Bern 4, Biel/Bienne 2	Café and roaster, with seating and in stations	2 of 6
Boréal	5	5	Geneva 4, Zurich 1	Speciality coffee shop with seating	1 of 5
miró	5	5	Zurich 5	Speciality coffee, with seating and to go in stations	2 of 5
Rent a Barista	5	5	Zurich 5	Speciality coffee shop with seating	0 of 5
Oakberry	9	5	five cities, one each	Açaí bowls to go	0 of 5
Starbucks (reference)	50+	32	Zurich 12, Geneva 6, six other cities	Coffee shop with seating	17 of 32

Chains: brands with at least five outlets in Switzerland; the table lists the café chains with at least five in the ten largest cities. McCafé (inside McDonald's restaurants) and retailers' counters excluded. Source: market screening, 2026.

The margins a coffee shop makes on food weigh on its profits: food prepared in-house costs about 30% of its price in goods,[11] while food bought from a third party leaves a lower margin, and a corner that sells the chain's beverages and buys its food can work as long as drinks are most of the ticket. A coffee shop in a central location gives the brand a stronger image, but food is needed to reach the sales targets: some coffee brands work with a local bakery, as Blasercafé with Bäckerei Reinhard in Bern since 2018 and Oetterli Kaffee with Bäckerei Laube in Solothurn since 2016,[17] while ViCAFE opened its own bakery in 2021 to supply its espresso bars in Zurich.[18]

Chains and groups survive more often: in Zurich, 59% of the venues they opened between 2014 and 2020 were still open five years later, against 48% of the others. Their advantage largely comes from knowing how to run the operations of the outlet and how to select and optimize the site.[19]

For roasters that also sell to bars, restaurants and offices, branded accessories can be a good tool both for marketing purposes and to attract new customers. In Switzerland Blasercafé rents cups, glasses, grinders and barista equipment to its restaurant clients,[20] and illy has printed its cups with the work of more than 100 artists since 1992.[21] Starbucks launches limited-edition cups every holiday season, and Blue Bottle designs collections.[22]

16 foodservice, Top 42 Gastro-Unternehmen Schweiz 2023, Jahrbuch Ausser-Haus-Markt 2023/24 (via Horizont, 21 October 2024).
17 Swiss Bakers' Association (SBC), panissimo, Gewerbliche Zusammenarbeit als Chance, 11 March 2020.
18 ViCAFE, Bei Amy in der neuen ViBakery (blog), 21 October 2021.
19 City of Zurich, Stadtpolizei, Gastwirtschaftsbetriebe der Stadt Zürich (open data), January 2026; Linearis analysis of the venues opened 2014–2020.
20 Blaser Café, Gastronomy: Competences, accessed 19 October 2026.
21 Global Cosmetic Industry, illycaffè and the art of enjoyment, 6 July 2017.
22 Fortune, Starbucks apologizes for 'Bearista' chaos, 7 November 2025; The Korea Herald, Marimekko and Blue Bottle Coffee collaboration.

We are a Swiss-based strategy practice **working with consumer, retail and hospitality companies.**



Whether you are developing a new format and need to define the target customer and evaluate its profitability, expanding into a new set of locations, testing a new concept or entering a new market, or have a portfolio that has become too complex without improving performance, we can help.

We also work selectively with founder-led and emerging businesses developing their first physical concept, from defining the proposition and offer to assessing the business case and format.

Reach out to discuss

contact@linearis.consulting

+41 (0)21 652 07 52
linearis.consulting
Mont-sur-Lausanne, Switzerland