

Linearis

FORMAT BRIEF

SWISS FOODSERVICE REPORT · OCTOBER 2026

Fast food & **take-away**

+28%

Fast-food outlets in Switzerland, 2018–2024, the fastest-growing format[1]

+53%

Take-away and delivery turnover of restaurants, cafés and fast food, 2018–2024[2]

≈4×

Sales of a Holy Cow! restaurant, about CHF 2.5 million, against a venue outside the chains (estimate)[3]

3 in 4

Fast-food outlets in the ten largest cities belong to no chain: room for brands with a standard format and a distinctive offer[4]

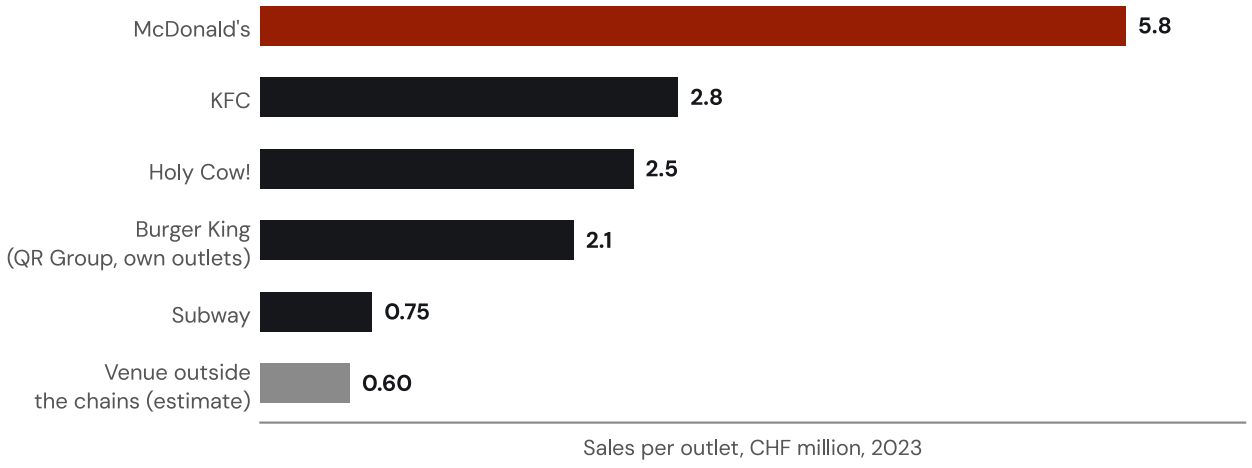
CONSUMER / RETAIL / HOSPITALITY

01
Volume, standard dishes, **preparation out of the outlet**

Fast food is the fastest-growing format in Switzerland, with 28% more outlets between 2018 and 2024,[1] while restaurants, cafés and fast food together sold 53% more to take away and deliver over the same years.[2] The format grows by focusing on standardized dishes, such as burgers, sushi and sandwiches, with limited table service and with the preparation moved out of the outlet, but it sells at a lower ticket: a take-away purchase is on average less than half of a meal at the table, about CHF 11 against 25 (estimate),[5] and a lunch menu costs CHF 18.75 at the median, against 23.75 in a restaurant.[6]

This lower ticket has to be compensated by volumes and efficiencies, developing new solutions or simplifying the operations. Half of McDonald's 190 Swiss restaurants have a drive-through and more than 165 offer delivery, which Dieci has also added to its pizzerias.[3,7] A McDonald's restaurant sells about CHF 5.8 million a year, almost six times the average venue, and a Burger King about 2.1 million.[3] To reach these volumes the restaurant leaves production to its suppliers: at McDonald's, industrial suppliers make the components to detailed specifications, and the restaurant only finishes and assembles.[8]

FIGURE 1 **Fast-food chains: sales per outlet, 2023**



Sales and outlets as published by foodservice (Top 42, 2023), partly estimated by the publisher; ratios calculated. Only operators that run a single fast-food brand. Staff per outlet: McDonald's 25 FTE, Subway 6. Venue outside the chains: restaurants, cafés and fast food, about CHF 0.6 million (2024, estimate).

Standardization is easier with large volumes, but also works for smaller networks: many brands run their own production unit, which gives them better control of quality, and some keep a kitchen in the outlet with a short menu, together with take-away. Holy Cow!, with about fifteen restaurants, sold about CHF 2.5 million per restaurant in 2023.[3] All the chains in Figure 1 sell from about CHF 0.75 million (Subway) to 5.8 million (McDonald's) per outlet, against about 0.6 million (estimate) for an average venue outside the chains, yet three quarters of fast-food outlets in the ten largest cities still belong to no chain.[3,4] Entering the market is relatively easy, but keeping a good margin can be challenging,[9] while setting up a chain requires a specific organization but offers opportunities to develop and succeed.

1 BFS, Statistics on enterprise structure (STATENT), NOGA 561001, 2018–2024; split by format with OpenStreetMap.
2 ESTV, VAT statistics, NOGA 561001, 2018–2024.
3 foodservice, Top 42 Gastro-Unternehmen Schweiz 2023, Jahrbuch Ausser-Haus-Markt 2023/24.
4 Linearis, market screening of the ten largest Swiss cities, 2026.
5 Schweizer Bauer (sda), Verpflegung ausser Haus: Schweizer geben weniger Geld aus, 23 April 2014 (GastroSuisse annual media conference). Data 2014; no more recent figure published.
6 Lunchmenu.ch, price indices, September–October 2026.
7 McDonald's Schweiz, Zahlen und Fakten, September 2026 (104 restaurants with McDrive, more than 165 with McDelivery).
8 McDonald's Schweiz, Impact Report 2026 – Essen, 28 September 2026.
9 Restaurants with less than CHF 550,000 of sales: only four in ten give their owner a satisfactory income (Promptus, Branchenkennzahlen Gastronomie Schweiz, data GastroSuisse Branchenspiegel 2026, 6 August 2026); many bakeries with less than CHF 750,000 of sales cannot pay the owner an adequate salary (Swiss Bakers' Association, Branchenspiegel 2019).

02

Central production **or cooking in the outlet**

Many local chain brands leverage a production unit that supplies the outlets with finished or semi-finished products, which are then finalized at the outlet and offered to take away or in menus.

TABLE 1 **Fast-food and take-away production models, 2026**

Model	Brands (outlets in Switzerland)	Outlet	Comments	Limits
Own production unit, outlets finish and sell	Tiny Fish (11), Yooji's (14), SushiZen (17 points of sale), Brezelkönig	Small counter, few or no seats	Same quality in every outlet; the unit can also supply retail: Yooji's makes ZENBU for Coop, Tenz Momo supplies Migros, Felfel and Farmy	Outlets within delivery distance of the unit; pays off from about five outlets
Cooking in the outlet, short menu	Holy Cow! (about 15), Kaimug (12)	With a dining room, about 140–300 m² and CHF 2–2.5 million of sales	High-traffic sites and an efficient layout bring high sales per outlet, which cover the duplicated costs	Equipment and kitchen staff duplicated in every outlet
Industrial suppliers (reference)	McDonald's (190)	Counter, seats, drive-through	Outlets only finish and assemble	Needs the volume to have suppliers produce to its specifications

Sources: Moneycab, 5 June 2026 (Tiny Fish); Two Spice, job advertisements, 2025; SushiZen, company website; Kaimug, company website, September 2026; foodservice, Top 42 Switzerland 2023; NoHo Partners, 2023; Die Mobiliar (Tenz Momo); McDonald's Schweiz, Zahlen und Fakten and Impact Report 2026. Five outlets: Linearis estimate.

Brezelkönig's central plant in Emmenbrücke makes about 11 million pieces of raw dough a year for all its Swiss outlets and keeps them frozen; the outlets only bake, fill and sell them.[10] Yooji's production site in Rümlang employs more than 90 people and delivers several times a day to its 14 restaurants and stores.[11] This centralization makes expansion easier and helps keep the quality of the offer under central control, as the CEO of Tiny Fish says of the central production that supplies its eleven outlets.[12] SushiZen produces more than 35,000 sushi fresh every day and sells them the same day in its eight shops and nine corners in Manor stores.[13] The same unit can also work for retail: the Rümlang site makes the ZENBU sushi and poké sold by Coop, and Tenz Momo, whose dumplings are folded by hand, supplies Migros, Felfel and Farmy.[11,14]

Other brands cook in the outlet, with a short menu and orders at the counter and no service. The chains of this group that keep a dining room, mostly burger and Asian concepts, often with a terrace, use about 140–300 m² and sell about CHF 2–2.5 million a year, as Five Guys does in Europe, about 2.4 million.[15]

10 Luzerner Zeitung, Brezelkönig baut Produktionsstätte in Emmenbrücke aus, 2019.
11 Two Spice AG, job advertisements, January and December 2025.
12 Moneycab, Tobias Bischoff, Co-Founder und CEO Tiny Fish AG, im Interview, 5 June 2026.
13 SushiZen, Histoire, company website, accessed 22 October 2026.
14 Die Mobiliar, Erfolgreicher Jungunternehmer aus Tibet (Tenz Momo), undated.
15 NoHo Partners, inside information, 6 July 2023; Restaurant Online, 24 September 2024.

03
Traffic-focused chains **and city chains**

Depending on where they open, these chains can be split into two groups: the traffic-focused chains, such as Brezelkönig or Dunkin', which keep more than 30% of their outlets within 400 m of the main station and tend to be present in multiple cities, and the city chains, such as Tiny Fish or Kaimug, which keep 30% or less and usually focus on a limited number of cities.[4] Some large brands, such as McDonald's, are present in both types of location.

Choosing high-traffic sites requires a structure able to meet the complex requirements to rent the spaces, the restrictions set by the real estate operator and the long opening hours, and most outlets in the main stations, about seven in ten, are run by chains, retailers or catering groups, such as Brezelkönig, Dunkin' or Rice Up![4]

City chains are usually recent concepts or historic names of their city, such as Tiny Fish or Kaimug, that sell mostly to go, usually with few seats. Their hours follow lunch and the working day. The selection of the location and its configuration is often the key criterion for success. Tiny Fish, for example, serving up to 3,000 customers a day in its eleven outlets, chooses its sites considering the number of offices within walking distance, footfall, visibility, floor plan distribution and rent, and also looks for sites in the suburbs.[12]

TABLE 2 **Chain outlets in the main stations, 2026**

	Zurich HB	Bern	Winterthur	Lucerne	Geneva Cornavin	Basel SBB	St. Gallen	Lausanne	Biel/Bienne	Nine main stations
Outlets	71	25	22	17	17	16	15	11	4	198
Chains*	48	20	16	13	7	11	11	7	3	136
Share	**68%**	**80%**	**73%**	**76%**	**41%**	**69%**	**73%**	**64%**	**75%**	**69%**

Outlets inside the station building or within 12 m of it: restaurants, cafés, fast food, take-away, bakeries, pastry shops, bars, kiosks and convenience stores. *Run by chains (brands with at least five outlets in Switzerland), retailers (Migros, Coop, migrolino, k kiosk, avec) or catering groups. Lugano: no data. Source: market screening, 2026 (OpenStreetMap).

TABLE 3 **Traffic-focused chains and city chains, ten largest cities, 2026**

	Traffic-focused chains	City chains
Examples	Brezelkönig, Dunkin', Subway, Burger King, Holy Cow!	Tiny Fish, Kaimug, Thai Style, Burgermeister, Kaisin
Outlets within 400 m of the main station	About half (48–55%)	14–21% (venues outside chains: 14%)
Network	Present in several cities	Few cities, many outlets in one (Kaimug: 8 of 12 in Zurich)
Opening hours	Long hours, following the station's traffic	Lunch and the working day
Site selection	High-traffic sites, with the landlord's requirements and restrictions	Offices within walking distance, footfall, visibility, floor plan, rent (Tiny Fish)

Chains with at least five outlets in the ten largest cities. Traffic-focused chains: more than 30% of their outlets within 400 m of the main station; city chains: 30% or less. Source: market screening, 2026; Kaimug, company website, September 2026; Moneycab, 5 June 2026 (Tiny Fish).

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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.

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