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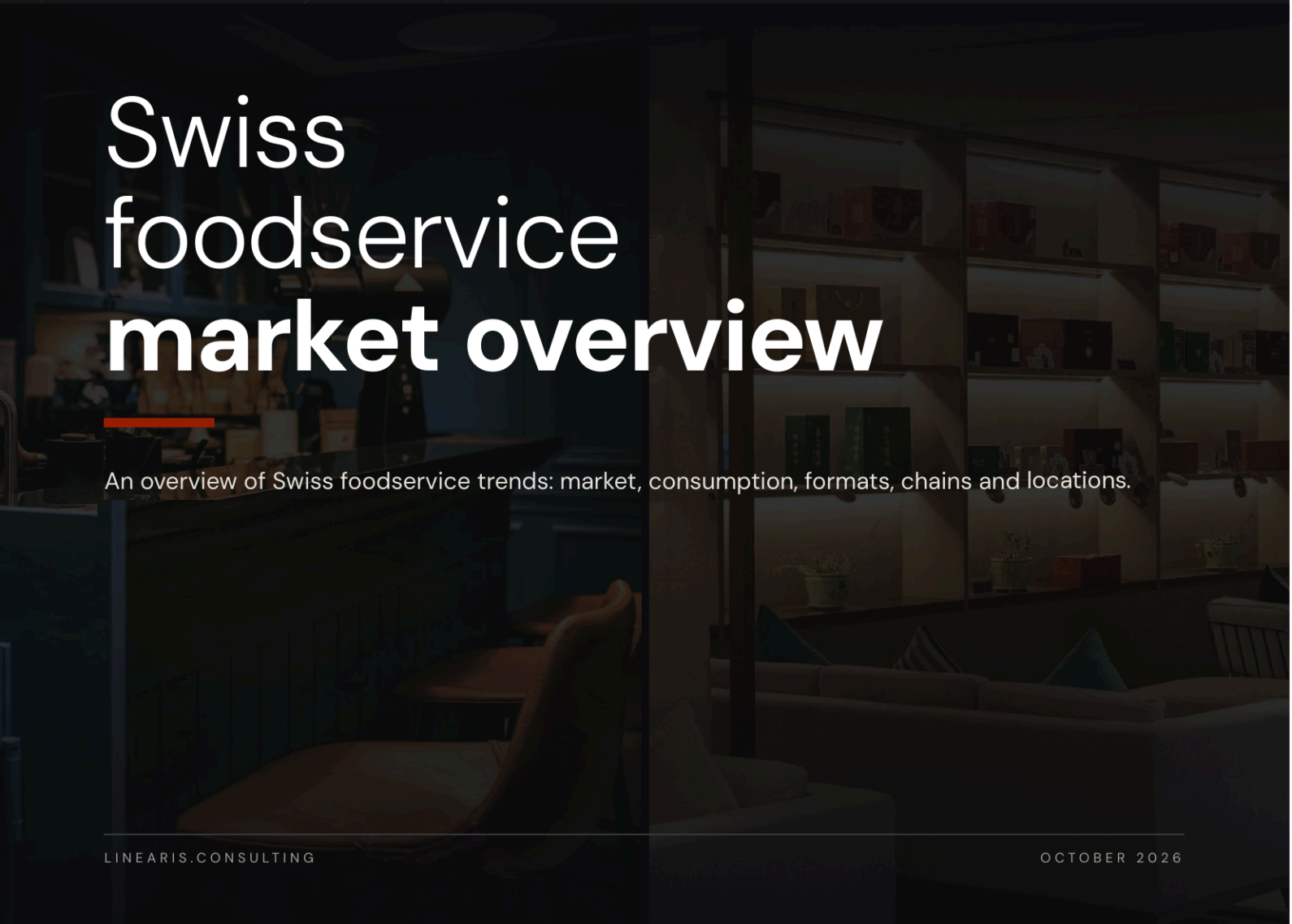
CONSUMER / RETAIL / HOSPITALITY

SWISS FOODSERVICE REPORT

OCTOBER 2026

Swiss foodservice **market overview**

An overview of Swiss foodservice trends: market, consumption, formats, chains and locations.



A flat market, **where take-away, lunch-focused and organised groups do better**

CHF 18.2 bn

Market in scope, 2024: CHF 16.2 bn for restaurants, cafés, fast food, bars and pubs, about CHF 2 bn for artisanal bakeries, pastry shops and tea rooms[1,2]

-3%

Turnover of restaurants, cafés, fast food, bars and pubs, 2018–2024, net of the rise in menu prices, which was about 9%[1,3]

19%

Share of take-away and delivery in the turnover of restaurants, cafés and fast food, 2024, up 53% since 2018[1]

42%

Share of sales that goes to staff in Swiss food service[4]

+28%

Fast-food outlets, 2018–2024; pubs -27%, restaurants -3%[5]

+17%

Sales per FTE of restaurant groups against the independent restaurant[6]

Swiss foodservice turned over about CHF 18.2 bn in 2024, of which CHF 16.2 bn for restaurants, cafés, fast food, bars and pubs and about CHF 2 bn for artisanal bakeries, pastry shops and tea rooms.[2] Between 2018 and 2024 the turnover of restaurants, cafés, fast food, bars and pubs rose by 6%, but net of the rise in menu prices it shrank by 3%, a level which is not expected to improve by the end of 2026 (estimate). Households eat and drink out of home (OOH)[7] less, and customers' spending moves towards take-away and fast food.

Lunch and the morning coffee hold up while the evening out declines, especially among young people, and the growth in outlets concentrates in the cantons of the large cities, Zurich, Geneva and Vaud, while in most of the other cantons their number falls.

In the food-service industry business results are driven by staff costs, with staff taking about 42% of sales. This explains why, on average, less than half of restaurants are fully profitable, while formats that offer limited table service, prepare little on site, leverage take-away and maximize the use of their retail space, offering several consumption occasions through the day, improve their performance.

Groups and chains sell more per FTE than independent venues, as they maximize economies of scale by sharing purchasing, recipes, training and management. Chains that depend on their own kitchen tend to grow first in the city where they are known, while chains that live on passing traffic target high-traffic locations, such as train stations, which are usually difficult and expensive to access for smaller companies.

1. Federal Tax Administration (ESTV), VAT statistics, NOGA 561001 and 563001, 2018–2024.
2. Swiss Bakers' Association (SBC), estimate of the turnover of artisanal bakeries, pastry shops and tea rooms.
3. Federal Statistical Office (BFS), Swiss consumer price index (LIK), restaurants, cafés and fast food, 2018–2026.
4. Federal Statistical Office (BFS), Accounting results of Swiss companies, T 06.04.01 and T 06.04.02, NOGA 56, 2024 provisional.
5. Federal Statistical Office (BFS), Statistics on enterprise structure (STATENT) and accounting results of Swiss companies, NOGA 56, 2018–2024.
6. Estimate: foodservice, Top 42 2023 (groups) and GastroSuisse Branchenspiegel 2026 via Promptus, 6 August 2026 (independent restaurant); full-time employees at CHF 61,000 each (BFS), for the groups and for the independent restaurant.
7. In the food and beverage industry, out of home (OOH), also called away from home (AFH), means all food and drink consumed outside the consumer's home.

Technical note. This report covers restaurants, cafés, fast food, bakery and pastry tea rooms, bars and pubs; hotels, canteens, catering, nightclubs, gelaterias and kiosks are excluded. Turnover comes from VAT statistics (ESTV, 2018–2024) and, for artisanal bakeries, from Swiss Bakers' Association estimates; outlets and staff come from the business register (BFS STATENT). The split of restaurants, cafés and fast food, which share one NOGA code, is estimated from OpenStreetMap shares. Values marked "estimate" are Linearis calculations.

01
A market smaller than in 2018, **net of prices**

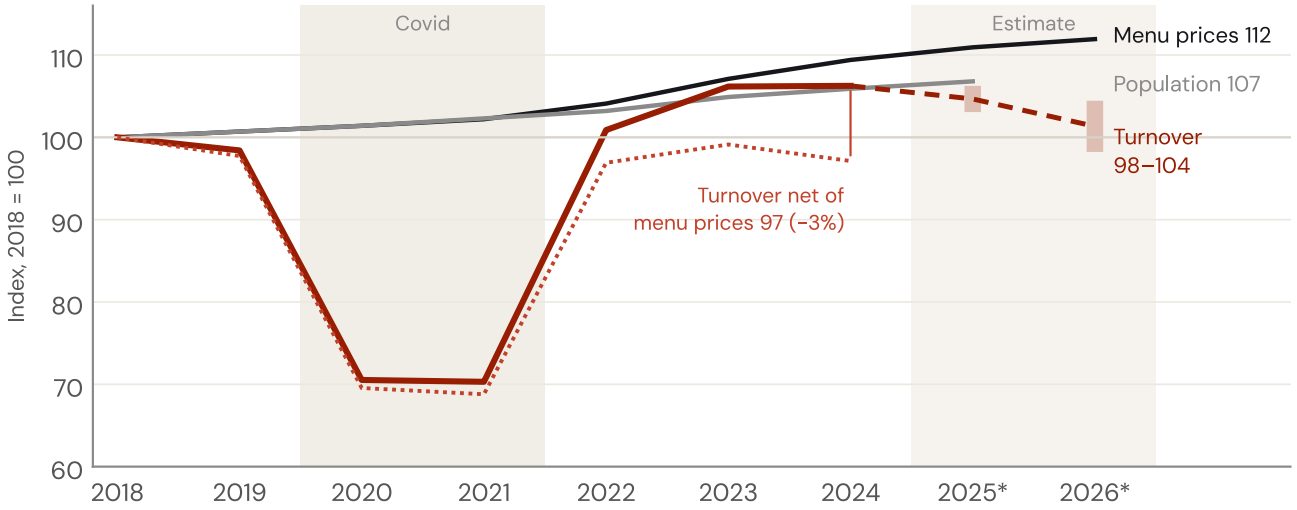
Turnover rose by 6% in current francs between 2018 and 2024, in line with the growth of the resident population. Menu prices rose by 9%, mostly to cover the increase in costs, but as households did not increase their spending in the segment, the rise in menu prices did not make up for the lower volumes (Table 1, Figure 1).[1,3,8] Per inhabitant, the market net of menu prices is about 8% smaller than in 2018, as the resident population grew by 6% while the market shrank by 3% (estimate).[9]

TABLE 1 **Turnover in current francs and net of price increases, 2018 and 2024**

Turnover, CHF million	2018	2024	Change, current francs	Change, net of price increases
Restaurants, cafés & fast food	14,388	15,355	+7%	-2%
on site	12,510	12,491	0%	-9%
take-away & delivery	1,878	2,864	**+53%**	**+40%**
Bars & pubs	864	851	-2%	-10%
Total, VAT data	**15,252**	**16,206**	**+6%**	**-3%**
Artisanal bakeries, pastry & tea rooms*	n/a	~2,000	n/a	n/a
Market in scope	**n/a**	**~18,200**	**n/a**	**n/a**

Turnover of VAT-registered businesses (ESTV VAT statistics, NOGA 561001 and 563001), net of VAT. Change net of price increases: change in turnover after removing the rise in menu prices (BFS consumer price index, restaurants, cafés & fast food, +9.3% from 2018 to 2024). On site = turnover at the normal VAT rate; take-away & delivery = turnover at the reduced rate. *SBC estimate, about CHF 2 bn a year; no figure by year, because VAT data mix artisanal bakeries with industrial producers.

FIGURE 1 **Turnover, menu prices and population, index 2018 = 100, 2018–2026**



Turnover net of menu prices: turnover divided by the menu price index. Turnover: restaurants, cafés, fast food, bars and pubs, current francs (ESTV VAT statistics). Menu prices: BFS consumer price index, restaurants, cafés and fast food (2026: January–August). Population: permanent resident population, 31 December (BFS). *2025 and 2026: estimate from the quarterly turnover of restaurants (KOF/GastroSuisse), as published (lower bound) and corrected for the gap to VAT data in 2024 (upper bound).

Considering the trends, for 2026 the market in scope is expected to stay between CHF 17.0 and 18.0 bn,[10] with restaurants, cafés, fast food, bars and pubs between CHF 15.0 and 16.0 bn, potentially below the CHF 16.2 bn of 2024, and artisanal bakeries, pastry shops and tea rooms stable at about CHF 2 bn.[2]

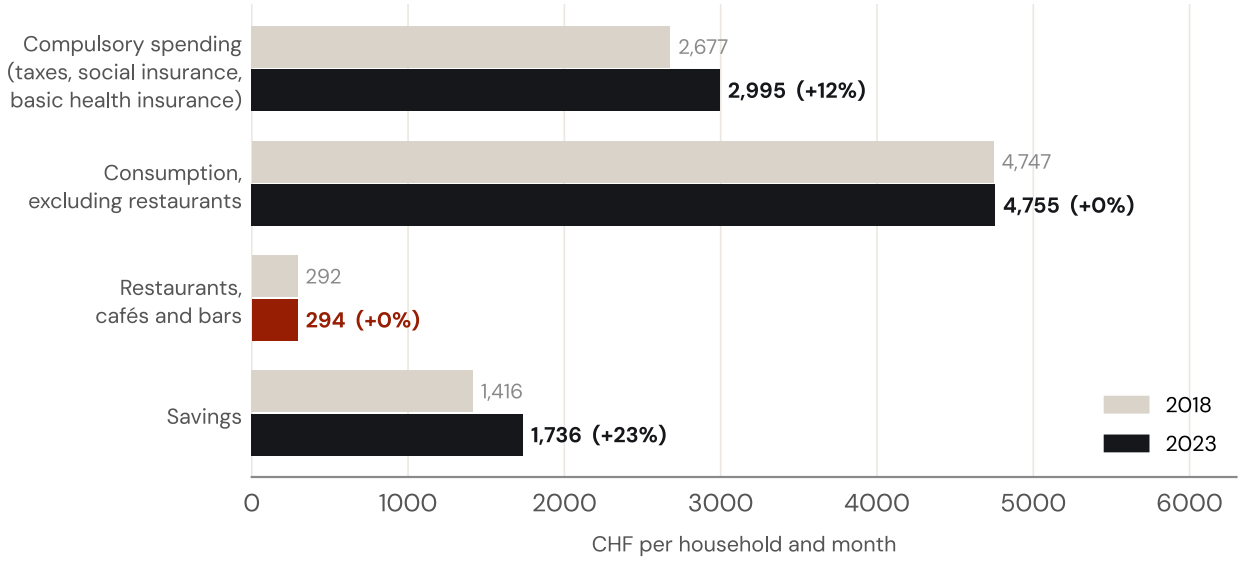
8. Federal Statistical Office (BFS), Household budget survey (HABE): household income and expenditure, 2006–2023 (tables je-d-20.02.01.00.01 and je-d-20.02.01.02.01).
9. Estimate: turnover of restaurants, cafés, fast food, bars and pubs net of menu prices (ESTV, BFS consumer price index) divided by the permanent resident population (BFS), 2018–2024.
10. KOF/GastroSuisse, quarterly survey of the restaurant industry, first half of 2026: most GastroSuisse members expected demand to stay flat in the coming months, and almost a quarter expected it to fall.

02

Average income rises, **but spending out of home stays flat**

Between 2018 and 2023 a household's disposable income rose by 7%, while its monthly spending in restaurants, cafés and bars stayed almost flat at about CHF 290, corresponding to 4% of income.[8] Households saved more instead, with savings up 23% and compulsory spending, mostly taxes and health insurance, up 12%, while all other spending stayed flat (Figure 2).

FIGURE 2 **Household spending pattern, 2018 and 2023**



Source: BFS, household budget survey (HABE), all households, current francs. Disposable income CHF 6,699 (2018) and 7,186 (2023), +7%. Consumer prices +5% over the same years (BFS). Weighting model revised in 2022: compare with care.

Consumer spending concentrates at lunch, as more than half of what is spent on meals out of home is spent at midday,[11] which makes lunch the main consumption occasion for most venues and brings many of them to be located in working neighbourhoods. From a price perspective, the restaurant gets a higher ticket, with a lunch menu at CHF 23.75 at the median, against 18.75 in fast food and take-away and 18.33 in cafés and bakeries (Table 2).[12] The lower ticket of the other formats is balanced by a higher number of customers, creating a flow which has to be organised from both an operational and a site layout perspective.

TABLE 2 **Prices of lunch, coffee and drinks, 2026**

Lunch menu	CHF	Coffee	CHF	Drinks	CHF
Restaurants	23.75	Espresso	4.50	Draught beer, 3 dl	5.00
Fast food & take-away	18.75	Café crème	4.80	Draught beer, 5 dl	7.50
Cafés & bakeries	18.33	Cappuccino	5.50	Mineral water, 5 dl	5.80

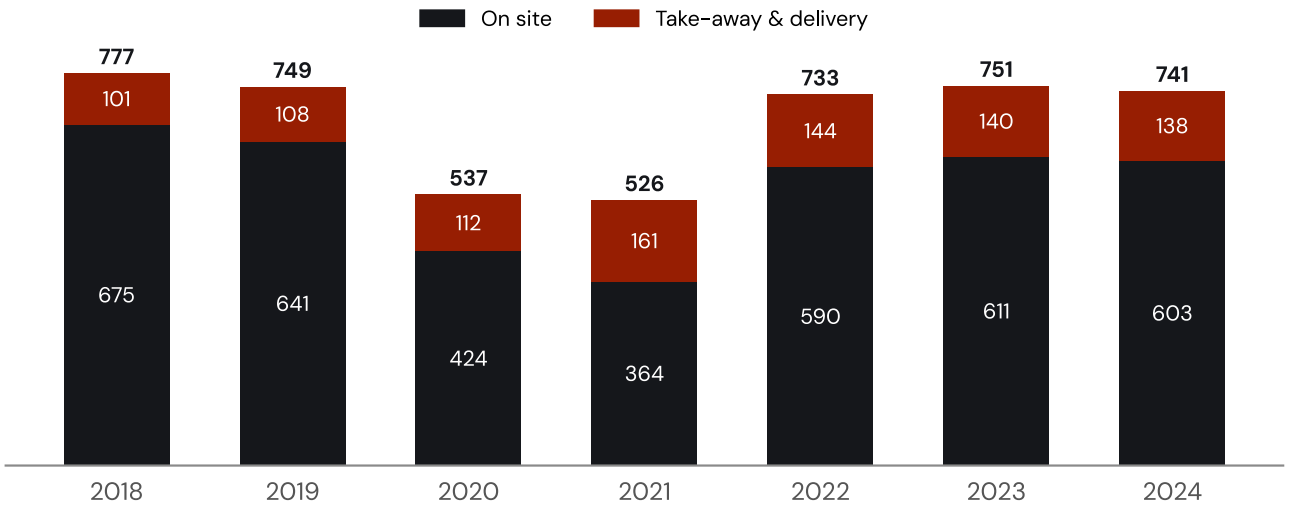
Median price, Switzerland, incl. VAT. Lunch: 1,248 restaurants in 36 cities; espresso: 613; draught beer 3 dl: 267. Source: Lunchmenu.ch price indices, September–October 2026.

11. SRF News, Beim Auswärtsessen wird gespart, 17 April 2013 (GastroSuisse, via sda). No more recent figure has been published; we expect the share of lunch to be at least as high today, as the evening out declines and workplace canteens lose part of the meals eaten out of home to the other venues (page 5).
12. Lunchmenu.ch price indices, published menus and price lists, September–October 2026; median of each restaurant's prices, then median across restaurants.

Take-away grows, **while the evening out declines**

Since Covid the consumption pattern has changed, with customers of restaurants, cafés and fast food spending 53% more on take-away and delivery between 2018 and 2024, which now make up 19% of their turnover. Per outlet this translates into about 37% more take-away sales at 2024 prices, from CHF 101,000 to 138,000, while sales on site per outlet fell (Figure 3).[13] Food sold to go also pays 2.6% VAT, against 8.1% for what is consumed on site.

FIGURE 3 **Turnover per outlet of restaurants, cafés and fast food, CHF thousand at 2024 prices**



Turnover: ESTV VAT statistics, NOGA 561001; on site = normal rate, take-away & delivery = reduced rate; flat-rate filers split with the same shares. Outlets: BFS STATENT. Prices: BFS consumer price index, restaurants, cafés and fast food. Ratio of two sources: indicative. 2020–21: Covid closures.

Coffee, in its to-go version, is the item sold most in the morning, usually on the way to work or at stations,[14] where venues and retailers sell a café crème to go for about CHF 3.70 (estimated average),[15] about a franc less than the median of CHF 4.80 at the table (Table 2).

The change of customers' habits due to remote work also had an impact on the distribution of lunches during the week. Workplace canteens, the direct competitors of restaurants at lunch, are losing ground, as their share of meals and drinks consumed out of home fell from 16% to 11% between 2018 and 2024, and on Fridays lunches in staff restaurants fell by about a third after Covid.[16]

At stations the traffic concentrates at rush hours, with few travellers in between, while office districts have a breakfast and a lunch peak and tend to empty in the afternoon and at weekends, which is why most speciality coffee bars in city streets close between 3 and 6.30 p.m.[14]

The change of habits also impacted the evening venues, with the share of young people who go to a club at least once a week falling from about a third in 2007 to less than a tenth in 2022.[17] The share of beer drunk in bars, restaurants and hotels also fell, from half of all the beer sold in Switzerland in 2012 to 31% in 2024/25,[18] a number that can be directly connected with the decline of pubs, which lost more than a quarter of their outlets between 2018 and 2024 (page 6).[5]

13. ESTV, VAT statistics, 2018–2024 (on site: normal rate, 8.1%; take-away and delivery: reduced rate, 2.6%); BFS STATENT (outlets) and consumer price index (2024 prices).
14. Linearis, market screening of the ten largest Swiss cities: venues and chains from OpenStreetMap and chain websites, opening hours, listings of commercial ground floors, September–October 2026.
15. Blick (U. Rotzinger), 30 Anbieter im grossen BLICK-Check: Heisse Preisunterschiede beim Becherkaffee, 20 August 2018; updated to 2026 (estimate).
16. SRF News, Kantinen verlieren Marktanteile – und setzen auf «Ultrafrische», 9 June 2026.
17. SRF (A. Kreidler), Kein Spass am Nachtleben: Warum gehen junge Menschen nicht mehr aus?, 17 May 2026.
18. GastroJournal, Schweizer Bierkonsum ist rückläufig, 28 November 2023; Swiss Brewers' Association (SBV), Braujahr 2024/25, press release, 26 November 2025.

03
Fast food and tea rooms grow, **evening formats lose**

The total number of food-service outlets in Switzerland rose from 2018 until 2022, when it reached about 26,700, and then fell in the next two years, with a higher impact on the restaurant category, which lost about 400 outlets between 2022 and 2024 (Table 3).[5]

TABLE 3 **Establishments by category, 2018–2024**

Category	2018	2019	2020	2021	2022	2023	2024	2018–24
Restaurant*	15,655	15,755	15,548	15,652	15,615	15,458	15,219	**–3%**
Café*	2,666	2,770	2,841	2,906	2,970	2,986	3,015	**+13%**
Fast food*	1,940	2,049	2,085	2,190	2,304	2,390	2,488	**+28%**
Tea room	772	802	814	834	846	849	838	**+9%**
Bakery laboratory	1,664	1,676	1,675	1,706	1,715	1,703	1,686	+1%
Bakery shop (no seating)	1,239	1,206	1,188	1,163	1,156	1,123	1,091	**–12%**
Bar*	1,577	1,633	1,615	1,551	1,537	1,506	1,471	**–7%**
Pub*	662	641	607	561	540	513	481	**–27%**
Total	**26,175**	**26,532**	**26,373**	**26,563**	**26,683**	**26,528**	**26,289**	**0%**

Establishments in Switzerland (December). Source: BFS STATENT (NOGA 561001, 563001, 107100, 472401, 472402). *Split within the NOGA code estimated from OpenStreetMap shares (ohsome API). Gelaterias removed; kiosks excluded. 2024 adjusted for the reclassification of 19 tea rooms in St. Gallen and Vaud.

Fast food is the only format showing constant growth, with new outlets every year, even in 2020 and 2021 when dining rooms were closed, while cafés and tea rooms grew until 2022 and then stopped.[5] Growth remains concentrated in the large cities, and in the cantons of Zurich, Geneva, Basel-Stadt, Vaud and Bern restaurants, cafés and fast food grew by 6% since 2018, while the other cantons lost outlets (Table 4).

Among all the types of venue, the evening-focused formats are the ones which lost the most, as bars and pubs together lost 13% of their outlets, almost 300.[5] Tea rooms, in this report considered comparable to a bakery with seating areas, added 9% of outlets, while bakeries and pastry shops without seating lost 12%, and the laboratories that supply them stayed flat, a trend that shows how the segment is consolidating and offering a better customer experience.[19]

If we consider all the cantons, Geneva, Zurich and Vaud are the ones adding outlets; St. Gallen, Bern and Ticino lose the most.[5]

TABLE 4 **Restaurants, cafés and fast food, outlets**

	2018	2024	Change
Cantons of the five largest cities	9,434	9,991	**+6%**
Other cantons	11,083	10,992	**–1%**
Switzerland	**20,517**	**20,983**	**+2%**

BFS STATENT, NOGA 561001. Five largest cities: Zurich, Geneva, Basel, Lausanne, Bern.

TABLE 5 **Largest net change in outlets, all formats**

Canton	2018	2024	Net
Geneva	1,991	2,220	**+229**
Zurich	3,904	4,039	**+135**
Vaud	2,505	2,623	**+118**
Ticino	1,652	1,600	**–52**
Bern	2,910	2,827	**–83**
St. Gallen	1,705	1,599	**–106**

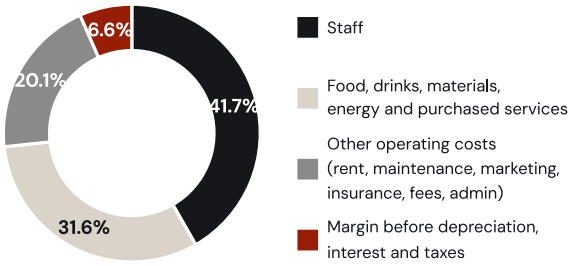
All formats in Table 3. Source: BFS STATENT, December.

19. Blick, Mehr Kosten, weniger Nachwuchs: Diese Bäckereien sind in den letzten Jahren verschwunden, 30 August 2023 (Swiss Bakers' Association, annual report 2022): bakery sales points down from 3,077 to 2,514 in twenty years, branches of bakery companies up from 836 to 1,208.

04
Menu prices up 9%, **absorbed by cost increases**

As the market is saturated and fragmented, with relatively low barriers to enter, little growth and a product offering that can be easily perceived by customers as a commodity, competition becomes fierce. Differentiation alone might not be enough, and even top-rated restaurants with higher prices often have to rely on the hotels that host them to cover their costs,[20] so for medium and small players the economies of scale of a network, with shared purchasing, recipes, training and management, become the main lever. The global menu increase mainly covered the extra charges driven by inflation or related to the other cost increases, leading the food service segment to keep about 7% of revenue before depreciation.[4] Staff is the largest cost, followed by goods and by rent and the other operating costs (Figure 4). In restaurants staff weighs even more (Table 6).

FIGURE 4 **Cost structure of Swiss food service, % of revenue, 2024**



BFS, T 06.04.01 and 06.04.02, NOGA 56, 2024 provisional. Rent is part of other operating costs, energy of goods.

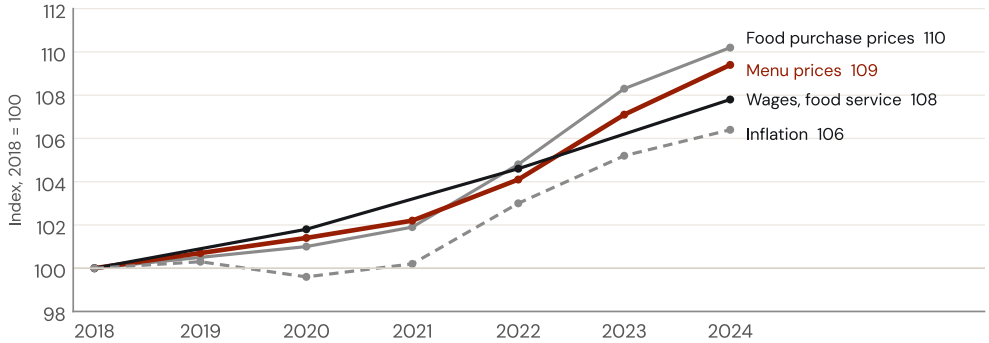
TABLE 6 **Cost structure by format, % of revenue**

% of revenue	All food service (BFS, 2024)	Restaurants (GastroSuisse, 2026)	Bakeries (SBC, 2019)
Staff	41.7%	51%*	48–50%*
Goods	31.6% (incl. energy and services)	26%	~29%
Rent	20.1% (rent and other operating costs)	8–12%	5–6%
Other operating costs	incl. above	14–18%	9–12%
Margin before depreciation	**6.6% (before interest and taxes)**	**about -4%***	**5–8%**

Sources: BFS, T 06.04.01 and T 06.04.02 (NOGA 56, 2024 provisional); GastroSuisse Branchenspiegel 2026, as reported by Promptus; restaurant rent: Schweizer Gastronomiefernschule (2024); SBC Branchenspiegel 2019. *Includes a salary for the owner's work (restaurants: market salary estimated by GastroSuisse, 7.7% of sales). Restaurants: margin after a market salary for the owner (7.7% of sales); without it, about +4%.

Menu prices rose faster than inflation and about as much as wages and food purchase prices (Figure 5).[3] Per outlet, however, sales grew by only 4% while staff costs grew by about 11%, as an outlet employs about 3% more full-time staff than in 2018 and pays them about 8% more, so the higher prices did not cover the higher cost of staff.[5,21]

FIGURE 5 **Costs and menu prices, 2018 = 100**



Annual averages. Menu prices: BFS consumer price index, restaurants, cafés and fast food. Inflation: BFS consumer price index, total. Wages: BFS Swiss Earnings Structure Survey, median monthly wage in food service (NOGA 56), surveyed every two years. Food purchase prices: BFS producer and import price index, food products (C10).

20. Blick, Immer mehr GaultMillau-Köche stellen ihren Herd ab: Was ist bei den Spitzenrestaurants los?, 31 October 2025 (B. Imhof, GastroSuisse; U. Pfäffli, GastroZürich).

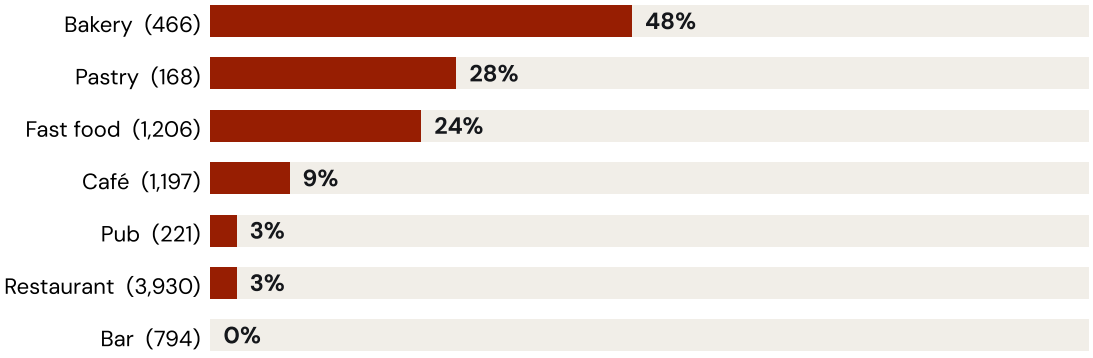
21. Federal Statistical Office (BFS), Swiss Earnings Structure Survey (LSE), median monthly wage in food service (NOGA 56), 2018–2024; full-time staff per outlet: BFS STATENT, restaurants, cafés and fast food, 4.9 in 2018 and 5.07 in 2024.

05

Chains sell more per FTE, **and their venues last longer**

Better performances are made by chains, mainly thanks to the standardization of their processes, which leads to higher sales per outlet.[22] Standardizing purchasing, recipes, training and part of the preparation allows groups to sell about 17% more per FTE and spend about 7 points less of their sales on staff.[6] Part of this advantage also comes from the greater availability of capital compared with smaller competitors, which gives access to larger venues and to sites with more traffic. By counting as chains all brands with at least five outlets in the country, about one outlet in ten in the ten largest cities belongs to one of them (Table 7),[14] and across Switzerland, even if chains still represent a small part of the number of outlets, they take a larger part of the sales, making about a fifth of the CHF 18 bn of the market.[22]

TABLE 7 **Share of chain outlets by format, ten largest cities, 2026**



Outlets in brackets. Total: 7,982 outlets, 10% chains. Source: market screening, 2026 (OpenStreetMap and chain websites).

While the food service of retailers lost outlets, with 33 fewer for Migros and 12 fewer for Coop since 2019, Swiss groups built around one cuisine type, such as Bindella, Dieci and Two Spice, grew both their sales and their network.[22] Chains and groups also withstand changes in the market better than independents: in Zurich, whose register of venues is public, 59% of the venues they opened between 2014 and 2020 were still open five years later, against 48% of those opened by independents (Figure 6).[23]

FIGURE 6 VENUES STILL OPEN AFTER FIVE YEARS, CITY OF ZURICH, VENUES OPENED 2014–2020



All formats. Source: City of Zurich, Stadtpolizei, register of venues (open data), January 2026; Linearis analysis.

22. foodservice (dfv Mediengruppe), Top 42 Gastro-Unternehmen Schweiz 2023, Jahrbuch Ausser-Haus-Markt 2023/24; reported in HORIZONT Schweiz (J. Pfannschmidt-Wahl), Gastro-Player knacken fast die sechs Milliarden Umsatz-Marke, 21 October 2024.

23. City of Zurich, Stadtpolizei, FG Bewilligungen, Gastwirtschaftsbetriebe der Stadt Zürich (open data), last updated 12 January 2026; Linearis analysis of the venues opened 2014–2020. Zurich is the only one of the ten largest cities that publishes the history of its venues (opendata.swiss, October 2026).

06

International chains grow through franchising, **Swiss groups with their own outlets**

TABLE 8 **Largest food-service operators serving the public**

Operator	Formats	Sales 2023, CHF m	vs 2019	Outlets 2023	vs 2019
McDonald's	Fast-food outlets	1,035*	+30%	179	+9
Migros	Restaurants and take-away counters in supermarkets, staff restaurants	635	-12%	335	-33
Coop	Restaurants and take-away counters, motorway restaurants (Marché)	362	+1%	229	-12
Bindella	Restaurants, Italian	170	+12%	46	+2
Autogrill	Restaurants and take-away counters on motorways and at stations	154*	-10%	96	-6
Dieci	Restaurants, pizza delivery	143	+83%	54	+8
Two Spice	Fast-food outlets (Yooji's), take-away counters (Rice Up!)	114	+10%	32	+1
Valora Food Service	Take-away counters (Brezelkönig, BackWerk), cafés (Caffè Spettacolo)	108*	-1%	90	-6

Source: foodservice, Top 42 Switzerland 2023 (Jahrbuch Ausser-Haus-Markt 2023/24). *Estimated by the publisher. Ranked by net sales 2023; changes in current francs. Contract caterers and airline catering excluded. Migros and Coop include their staff restaurants and catering; Coop includes Marché (CHF 122 million).

Large chains often grow through franchising, and foreign brands use it to enter a country through a local partner, who invests in the outlets and pays fees and usually a contribution to marketing. These extra costs leave room only for formats with high margins and a menu that is easy to replicate, based on standardised components, without table service and with take-away. For an established brand with its own central kitchen and a solid organisation, franchising can be the best way to grow, as the franchisees bring the capital and the brand earns on both the fees and the goods it supplies. The concept has to prove itself first, and Swiss Distribution, the association of franchisors, admits only members with at least two years of franchising and two franchisees.[24]

In Switzerland, for example, McDonald's runs 13 of its 190 restaurants itself; the other 177 are run by 45 franchisees.[25] Burger King works through a master franchisee, QR Group, which runs 39 outlets and passes 44 more to sub-franchisees such as Marché, Autogrill, SSP and Candrian.[22] A McDonald's franchisee in Switzerland in 2017 had to invest at least CHF 1.5 million, with at least CHF 0.5 million of own capital, and commit for at least 20 years.[26]

Among the local groups, franchising is rarer and generally limited to formats without table service, such as Dieci, Big Burger and Holy Cow!:[27] Big Burger, with 22 outlets, asks its franchisees an entry fee from CHF 70,000 and 3.5% of gross sales.[28] Most local groups, such as Bindella, tibits, Wiesner, Two Spice, Tiny Fish and ViCAFE, open with their own capital, one outlet at a time: they run table-service restaurants or cook much of their offer on site, formats which leave little room for royalties. The Swiss market is also small and split by language, so few operators have the capital and the experience to become franchisees, while a group that finances its own growth keeps the whole margin and the control of quality.

24. V. Jäggi, M. M. Jeanrenaud and C. Rapin (Kellerhals Carrard), Franchise 2022: Switzerland, Lexology Getting The Deal Through, July 2021.
25. McDonald's Schweiz, Zahlen und Fakten, September 2026.
26. McDonald's Schweiz, Voraussetzungen für eine Franchising-Partnerschaft mit McDonald's, 2017.
27. Dieci: Observatoire de la Franchise, interview with Dieci, 13 May 2017. Holy Cow!: Observatoire de la Franchise, first French franchise in Rouen, November 2012, royalty 5% of sales, consulted October 2026; owned by NoHo Partners since 2023 (NoHo Partners, NoHo Partners closes transaction to acquire the Swiss premium burger chain Holy Cow!, 2023).
28. Big Burger, Franchise, company website, consulted November 2026.

07
Traffic-focused chains **and city chains**

Chains can be grouped into two types, based on how they choose their locations: traffic-focused chains, which keep more than 30% of their outlets within 400 m of the main station, and city chains, which keep 30% or less (Table 8).[14] Traffic-focused chains live on passing customers, often with a short offer based on few products and supplied by national logistics or industrial producers, as Brezelkönig, and they need a structure able to meet the requirements of the station landlords and the long opening hours, so that about seven in ten outlets in the main stations are run by chains, retailers or catering groups.

City chains, usually recent concepts or historic names of their city, live on regular customers and focus more on the customer experience, often with a wider offer or table service, or with a specific brand positioning. They depend on their own laboratory or central kitchen, which keeps the network within delivery distance, and grow by opening several outlets in the city where they are known, where the costs are also lower than at the stations. Some large brands, such as McDonald's, are present in both types of location. For a brand, the group it belongs to shows which competitors it meets and what its organisation must be able to sustain.

TABLE 9 **Traffic-focused chains and city chains by format, ten largest cities, 2026**

Traffic-focused chains focus their outlets around the main station, while city chains target central urban areas.

	Traffic-focused chains			City chains		
Format	Chains	Outlets within 400 m of the station	Main examples	Chains	Outlets in other urban areas	Main examples
Take-away counter	5	55%	Brezelkönig, Tenz Momo, Dunkin'	6	86%	Tiny Fish, Kaimug, Thai Style
Fast-food outlet	5	48%	Subway, Burger King, Holy Cow!	6	79%	McDonald's, Burgermeister, Kaisin
Café	4	51%	Starbucks, Caffè Spettacolo, Adrianos	5	89%	ViCAFE, Joe & The Juice, MAME
Bakery shop	4	49%	Sprüngli, Bachmann, Reinhard	7	86%	Paillasse, Äss-Bar, Jung
Tea room	4	48%	Bakery Bakery, Kuhn, Pougnier	6	91%	Sutter Begg, Schwyter, Walter Buchmann
Restaurant	2	45%	Negishi, VITO	8	86%	Santa Lucia, Molino, Suan Long
Self-service restaurant	2	53%	tibits, Hiltl	–	–	
Total	**26**	50%		**38**	**85%**	

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, other urban areas: more than 400 m from the main station. Main examples: chains with the most outlets in the ten cities. Source: market screening, 2026.

Most city chains keep growing away from the station, but the approach can vary depending on the stage of development of the brand, since some brands reach the station after they have made their name in the city, and with a smaller format (estimate).[29]

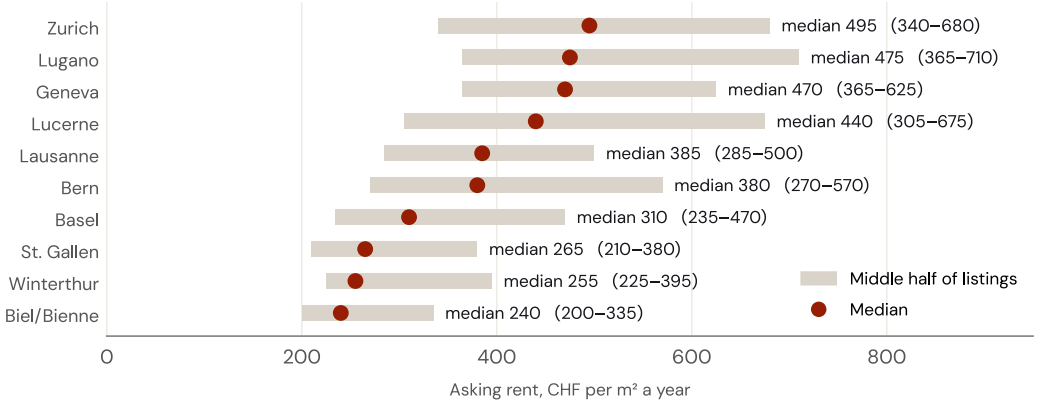
29. HeiGIT (Heidelberg Institute for Geoinformation Technology), ohsome API, OpenStreetMap history data, queried 2026.

08

Growth concentrates in the large cities, **with new cafés opening in trendy neighbourhoods close to the centre**

Location is a key component for food services, since it is linked to traffic and visibility, and its cost varies widely with the city and the venue. Between the large cities, and excluding very premium locations, the median rent of a ground-floor shop goes from CHF 240 per m² a year in Biel/Bienne to 495 in Zurich (Figure 7). If on average a restaurant pays about 8–12% of its sales in rent,[30] an outlet's annual sales per m² must be about eight to twelve times the annual rent per m².

FIGURE 7 **Asking rents of commercial ground floors by city, 2026**



Market screening, 2026. Asking rents of ground-floor shops, gross (where only the net rent is published, charges estimated at 7–11% depending on the city). Premium streets excluded.

Some shopping streets in the city centres are showing an increase in the number of empty shops compared with a year ago, such as rue de Bourg in Lausanne and Gerbergasse in Basel,[31] which can reduce footfall and helps explain why new cafés, brunch places and bars open in the neighbourhoods close to the centre, which are becoming popular and often have more affordable rents. Among these neighbourhoods are Wiedikon, the Langstrasse district and Zurich West in Zurich,[32] Eaux-Vives in Geneva,[33] Sous-Gare in Lausanne,[34] Länggasse and Breitenrain in Bern,[35] St. Johann in Basel,[36] the Bruchquartier in Lucerne[37] and Lagerplatz in Winterthur.[38] In Zurich the median rent in the Langstrasse district is about CHF 550 per m² a year, against about 1,100 in the old town, premium streets excluded.[14]

Knowing city dynamics is also key: in Zurich a venue opened where two or more have already failed lasts five years in 40% of cases, against 57% at a new address (Figure 8).[23]

FIGURE 8 **Venues still open after five years by address, city of Zurich, venues opened 2014–2020**



All formats. Source: City of Zurich, Stadtpolizei, register of venues (open data), January 2026; Linearis analysis.

30. Schweizer Gastronomiefernschule, Mietvertrag in der Gastronomie – alles, was Sie wissen müssen, updated 30 October 2024.
31. 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.
32. Swiss Magazine, a local's guide to Zürich's hottest spots, consulted October 2026.
33. The AU Review, Geneva's coolest neighbourhoods, 13 September 2025.
34. Mona Mona, Lausanne: 12 adresses quartier Sous-Gare, 15 January 2023.
35. Blick / Handelszeitung, welche Quartiere in Bern angesagt sind, updated 20 January 2026.
36. von Bartha, Basel's St. Johann district, 20 August 2022.
37. zentralplus, Das Luzerner Bruchquartier, 11 June 2019.
38. ZHAW Impact, Lagerplatz Winterthur, 19 June 2019.

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

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