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Report Highlights: In comparison to 2023, Czech food service sales increased 5 percent in 2024 to CZK 70.7 billion (USD 3.5 billion). Competition in the food service sector intensified in 2024, especially with key online retailers increasing their focus on ready-to-eat meal delivery services. As economic conditions began to improve in 2024, Czechs became more inclined to dine out, boosting demand for full-service restaurants. Pilsen Urquell is the leading player in 2024, with a foodservice value share of 3 percent. Prague continues to attract international tourism, which annually generates significant revenue. The iconic Hotel InterContinental has reopened as the five-star Fairmont Golden Prague following a total (USD 190 million) five-year renovation. The Czech market offers good opportunities for U.S. exporters of consumer-oriented food products, particularly nuts, seafood products, and distilled spirits.

Market Fact Sheet: Czechia

Executive Summary

The Czech Republic, also known as Czechia, boasts a stable and open market economy. In 2024, agriculture contributed 2.1 percent to Czechia's GDP, while the industry and services sectors accounted for 30 percent and 57.9 percent, respectively. After stagnating in 2023, the Czech economy has begun to grow moderately since 2024.

Trade Policy

As a European Union (EU) member, the Czech Republic follows all EU rules. Most Czech food legislation is harmonized at the EU level; where harmonization is absent, abiding with Czech law is required. The most important trade partner is Germany, accounting for almost one third of the country’s exports and imports. Within the EU’s Common Agricultural Policy (CAP), Czechia advocates for policies supporting large-scale farming, innovation, and sustainability.

Agricultural Imports

In 2024, Czechia’s total agricultural imports reached USD 15.2 billion, an 8 percent increase over 2023. European countries (EU 27) are the main agricultural trading partners, with Germany accounting for 20 percent of agricultural trade, followed by Poland, the Netherlands, and Slovakia. Imports of agricultural products from the United States totaled USD 188 million, a 16 percent increase from 2023. However, the import data may be misleading as some agricultural products originally from the United States can be re-exported, often after sorting, repacking, or further processing from other EU countries, mainly Germany or Netherlands.

Foodservice – HRI Industry

In 2024, value sales increased by 5 percent to \$3.5 billion. With higher economic growth in 2024, Czechs became more willing to spend more on high-quality dining out. The growing popularity of food home-delivery is driving the expansion of third-party delivery platforms that partner with many smaller restaurants to expand their customer base.

Why Should U.S. Companies Export to Czechia?

Czechia’s location in the heart of Europe serves as an entry point for U.S. companies, with easy access to Czech and surrounding markets. It is easily accessible via train, taking only 4 hours from Berlin, DE to the capital city of Prague. The Czech government is supportive of innovations and businesses that will further develop the economy.

Quick Facts CY 2024

Imports of Agricultural Products from USA

\$188 million

Imports of Consumer-Oriented Products from USA

\$127.9 million

List of Top 10 Sales Value Agri Products imported to the Czech Republic from the World

1. Pork Meat

3. Bread & Pastry

5. Chocolate

7. Poultry

9. Soft Drinks
2. Animal Feed Preps

4. Food Preps

6. Cheese

8. Coffee

10. Wine

GDP/Population

Population (million): 10.9
GDP (billion USD): \$337 (CZK 7,619)
GDP per capita (USD): \$30,956
Real Economic Growth Rate: 2.0% (May 2025)
2025 Annual Economic Growth Rate (Forecast): 1.2%

Exchange rate

1 USD = 21.323 Czech Crown (08/05/2025, Czech National Bank)

Data and Information Sources: Trade Data Monitor, Czech National Bank, International Monetary Fund, Czech Statistical Office, ReportLinker

Strengths	Weaknesses
One of the largest markets in central and eastern Europe that is highly integrated with some larger economies	Local importers prefer doing business in small orders making it harder for U.S. exporters that prefer larger quantities of goods
U.S. style food is popular, and U.S. products are widely accepted	Retailers require listing fees to introduce new products
	Food retailers and wholesalers typically do not buy directly from non-EU suppliers
Opportunities	Threats
Consumers are growing more conscious about sustainability and health trends in food and seeking high quality products	Czech language labeling requirements
One distributor can cover Czechia and Slovakia	Misinformation and misrepresentation about U.S. products
	Some products using biotechnology are prohibited as they are not approved in the EU

SECTION I. MARKET SUMMARY

Despite being a small country geographically, the Czech Republic, particularly its capital city Prague, is highly attractive to international companies and serves as an excellent base to Central and Eastern Europe. It is regarded as one of the most appealing environments for international businesses in Central Europe. Many international companies have increased their footprint in Czechia due to long-term growth in Czech purchasing power, which showed signs of improvement in 2024 following high inflation and increased living costs in 2022 and 2023. Additionally, several international brands have been drawn to Prague due to Czechia's (and especially Prague's) status as a global tourist and shopping destination. This is particularly evident in central Prague and major shopping centers, where new international brands often choose to open their first stores.

Overall Business Climate

The fundamental strengths of the Czech economy continue to be its central location, mild climate, skilled, English-speaking, and relatively (compared to Western EU countries) less expensive labor force, high-quality communications infrastructure, and a rather stable political climate. Czechia has a stable and open market economy and some of the lowest unemployment rates (forecast at 2.5 percent in 2025) among all EU member states. The economy is expected to grow by 1.6 percent in 2025. Agriculture's share of Czechia's gross domestic product (GDP) continues to be about 2 percent. The industry and services sectors contributed about 30 percent and 57.9 percent, respectively. Czechia's most important export and import partner is Germany, accounting for about one-third of total exports and imports.

Foodservice Market

The Czech commercial food service market includes hotels, restaurants, fast food and take-away outlets, bars, cafeterias, coffee shops, and home-delivery channels. The institutional food service market consists of hospitals, universities, nursing homes, and cafeterias.

In comparison to 2023, Czech food service sales increased by 5 percent in 2024 to CZK 70.7 billion (USD 3,316 million). Outlet numbers grew by 0.2 percent to 6,876 in the same year. Middle Eastern full-service restaurants are the best performing category in 2024, with foodservice value sales growing by 7 percent to CZK 218 million. Pilsner Urquell is the leading player in 2024, with a foodservice value share of 3 percent. Foodservice value sales are set to rise by 4 percent to CZK 83.9 billion.

Table 1. Consumer Foodservice Sales, in million CZK

	2020	2021	2022	2023	2024
Full-Service Restaurants Total	34,300	39,601	57,363	67,411	70,659
Chain Full -Service Restaurants	2,751	3,031	3,766	4,085	4,119
Independent Full-Service Restaurants	31,549	36,570	53,597	63,326	66,540

Source: Euromonitor

Table 2. Full-Service Restaurants Sales by Cuisine Type, in million CZK

	2020	2021	2022	2023	2024
Full-Service Restaurants Total	34,300	39,601	57,363	67,411	70,659
European Restaurants	22,627	25,817	37,700	44,287	46,353
Pizza Restaurants	7,204	8,628	12,161	14,427	15,177
Asian Restaurants	2,709	3,162	4,707	5,539	5,818
Latin American Restaurants	360	387	558	642	670
North American Restaurants	420	489	604	619	647
Middle Eastern Restaurants	114	126	177	204	218

Source: Euromonitor

Table 3. Brand Shares in Chain Restaurants: % Foodservice Value 2021-2024

Restaurant Name	Global Brand Owner	2021	2022	2023	2024
Pilsner Urquell Original Restaurant	Asahi Group Holdings Ltd	24.2	23.8	23.8	20.3
Kozlovna	Asahi Group Holdings Ltd	17.0	16.6	17.1	18.9
Potrefena Husa	Molson Coors Brewing Co	11.1	12.0	11.4	12.7
Pizza Coloseum	Coloseum Restaurants sro	5.8	6.9	7.7	7.5
Ambiente Restaurants	AMBI CZ sro	5.2	5.2	5.9	6.4
Hard Rock Café	Hard Rock Café International Inc	5.4	5.7	6.0	6.2
Radegastovna	Asahi Group Holdings Ltd	4.8	4.9	5.0	5.3
Svejk Restaurant	Daos Plus sro	4.3	4.0	4.2	4.2
Srdcovka	Asahi Group Holdings Ltd	2.8	2.7	2.7	3.1
The Pub	Pub Franchising sro, The	2.8	3.1	2.9	2.4
Satlava	3E Projekt as	2.0	2.1	2.2	2.3
Bernard Pub	Duvel Moortgat NV	1.6	1.8	1.9	2.0
Salanda	Heineken NV	1.8	1.7	1.7	2.0
Šnyt Restaurace	CEFC China Energy Co Ltd	1.5	1.4	1.5	1.7

Restaurant Name	Global Brand Owner	2021	2022	2023	2024
Original 1869	Asahi Group Holdings Ltd	2.8	2.3	1.6	1.7
Hooters	Hooters of America Inc	1.2	1.2	1.3	1.3
Original Pivnice Budvarka	Budejovicky Budvar np	1.4	1.2	1.2	1.0
Nase Hospoda	Molson Coors Brewing Co	1.4	1.8	1.8	1.0
TGI Fridays	TGI Fridays Inc	3.0	1.7	-	-
Total	Total	100.0	100.0	100.0	100.0

Source: Euromonitor

Consumer Trends

New Menus to Address Health-Conscious Consumers

Health and environmental concerns are increasingly shaping food consumption patterns in the Czech Republic, influencing not only grocery shopping but also the foodservice sector, particularly full-service restaurants. In response to these trends, many operators have diversified their menus to feature more vegetarian and vegan options, meals with reduced sodium and fat content, and dishes prepared with fresh, organic, and locally sourced ingredients. Independent restaurants have taken the lead in partnering with local farmers and producers, leveraging this strategy as a key differentiator to appeal to health-conscious diners. This focus on healthier and more sustainable dining options also resonates with some consumers' preference for supporting domestic suppliers—a sentiment that has gained momentum since the pandemic.

Fine Dining Versus Savings on Extras

Full-service restaurants have been positively impacted by the gradual stabilization of the Czech economy, particularly decreasing inflation. During 2022 and 2023, rising living costs reduced consumers' purchasing power, prompting greater caution in discretionary spending. However, as economic conditions began to improve in 2024, Czechs became more inclined to dine out, boosting demand for full-service restaurants. Although higher menu prices led some consumers to reconsider their dining choices, the overall effect was favorable for the restaurant sector, as many prioritized fine dining experiences over the cost-saving behaviors that were more common in earlier years.

While Czech consumers are willing to spend more on high-quality dining experiences, they are also seeking ways to reduce expenses. One notable trend is a decline in the purchase of add-ons such as soups, drinks, and post-meal coffees, especially during lunchtime. A recent value added tax (VAT) increase has driven up beverage prices, prompting many diners to skip these extras. Additionally, the rising popularity of food delivery services is amplifying this shift, as customers ordering meals for delivery are less inclined to include drinks or soups. This pattern has contributed to an overall decrease in supplementary purchases even at full-service restaurants.

Delivery Applications Popularity Driven by Millennials and GenZ

Rising demand for convenience and flexible dining options is fueling the growth of third-party delivery applications within the Czech Republic's consumer foodservice market. These platforms cater to consumers' preference for a seamless and contact-free experience, enabling them to order a wide range of meals with ease from the comfort of their homes. This trend is expected to gain further popularity, driven mainly by [Millennials](#) and [Generation Z](#). With many customers deciding where to dine out or place an order for food, often via their smartphones, maintaining a robust digital presence, especially on social media, has become essential for attracting clients.

As major delivery applications grow in popularity, many smaller restaurants that previously managed their own delivery services are now collaborating with larger platforms to broaden their customer base. Even restaurants that maintain in-house delivery services are increasingly listing their menus on these apps, recognizing their potential to attract new customers.

Online Marketing Role Growing

Online marketing is becoming an increasingly vital factor in the success of consumer foodservice establishments, including full-service restaurants. Restaurants are dedicating more resources to creating curated online content including targeted promotions, leveraging visually striking images, and engaging with food influencers to generate appealing posts. By utilizing social media to generate excitement and anticipation, restaurants can shape customer decisions before they even step out of their homes.

Foodservice Prospects

Full-service restaurants are well-positioned to take advantage of anticipated economic growth driven by lower inflation, stabilizing operating costs, and rising purchasing power. More consumers are expected to prioritize fine dining experiences as disposable income increases.

Despite these better prospects, many establishments may face challenges, particularly restaurants in smaller towns and rural areas that serve traditional Czech cuisine due to shifting consumer preferences towards new cuisine and competition from cafés, limited-service restaurants, and street stalls/kiosks. To stay competitive, they may need a very good value-for-price offer as well as introducing innovative and healthier dishes to their menus. Additionally, investing in digital marketing, especially through direct engagement on social media, and expanding takeaway and delivery services could help attract a broader customer base.

Competition in the food service sector intensified in 2024, especially with food online retailers Rohlik.cz and Kosik increasing their focus on ready-to-eat meal delivery services. These grocery giants, offering ready meals, meal kits, and delivery services, became attractive alternatives to traditional foodservice

options, especially during times of high inflation when consumers were more cautious with their spending.

Prague’s hotel sector experienced a relatively successful year in 2024, with four- and five-star hotels achieving an annual average occupancy of 75.2 percent, marking a five-percentage-point increase compared to 2023, when occupancy reached 70.8 percent. The average price in this accommodation segment rose by nearly €6 to €115.92 per occupied room per night (compared to €110.23 in 2023). Last year Prague's average occupancy was 3 percent higher than Vienna’s, 5 percent higher than Budapest’s, and approximately 12 percent higher than Bratislava’s.

Table 4. Advantages and Challenges of the Czech Foodservice Market for U.S. Suppliers

Advantages	Challenges
Generation Z demonstrates increased awareness about food choices and consumes meals outside the home even more frequently than Millennials, while prioritizing affordable prices. This trend presents significant opportunities for the food service industry.	Intense competition from other EU Member States and non-EU countries, such as Canada and Mexico, which have secured lower tariff rates.
Foodservice companies that provide online ordering and home delivery have experienced strong performance since the pandemic. This creates opportunities for U.S. food service chains seeking to enter this growing market segment.	Transatlantic transportation is expensive, time-consuming, and increasingly scrutinized, particularly in the context of greenhouse gas emissions and climate change discussions.
Unique and unusual products supported by a “story behind the scene” are appealing to higher-income consumers.	Some products, such as non hormone-free beef or poultry, cannot be exported to Czechia.
Overall consumers’ consciousness and interest in cooking and food quality is growing, supported by large popularity of cooking TV shows and social media foodies’ blogs.	Whereas social media can bring very positive vibes in favor of a specific product, they can also cause damage to the image of another one.

Source: FAS Prague

SECTION II. ROAD MAP FOR MARKET ENTRY

Entry Strategy

The Czech market presents good opportunities for U.S. exporters of consumer-oriented agricultural products, however success in introducing food products depends heavily on understanding the market. New-to-market exporters are advised to examine EU and Czech food laws, packaging and labeling requirements, business practices, trade regulations, tariffs, potential importers, and the distribution system.

Following market research, U.S. companies should explore attending or exhibiting at international trade shows. These events provide valuable opportunities to connect with local buyers, showcase products, and assess buyer interest. The FAS office can offer guidance on European trade shows worth considering for attendance or exhibition. Additionally, participating in Trade Missions organized by U.S. agricultural industry groups has consistently proven to be an effective strategy for engaging with local buyers.

In addition to this report, the FAS Office in Prague publishes an [Annual Exporter Guide](#) that can help a new-to-market exporter better understand the Czech market and can be downloaded from the [FAS](#) website.

Market Structure

Unlike the retail sector, the Czech food service sector is highly fragmented and has many independent players. This is especially true for cafés/bars, restaurants, cafeterias, and street stalls/kiosks. Many limited-service restaurants, however, are consolidated and often part of an international chain, such as McDonalds, KFC, Burger King or Subway. Chains from the United States are popular because of their efficiency, consistency, late opening hours, easy accessibility, and affordable prices. These chains continue to be successful because they have been able to respond to changing consumer demands and now, for instance, offer vegetarian and healthier food options.

SECTION III. COMPETITION

This section outlines the competitive landscape for U.S. suppliers in the Czech foodservice industry. U.S. exporters of products which are also grown or produced within the EU face challenges related to proximity, shipping times, tariffs, exchange rates, and certification requirements. For many products U.S. companies frequently compete with suppliers from other non-EU countries. Only a limited number of U.S. products face minimal competition in this market.

Table 5. Competitive Situation for Consumer-Oriented Products, 2024

Product Category (Product Code) Imports in Thousands of USD	Main Suppliers By Percentage		Note
Tree Nuts (HS0802) Total imports: \$117,979 From USA: \$55,584	1. USA 2. Russia 3. Ukraine 4. Germany 5. Georgia	47% 11% 11% 6% 6%	USA ranks first and U.S. nuts are valued for their quality. The U.S share is growing.
Food preparations (HS2106) Total Imports: \$670,777 From USA: \$19,746	1. Germany 2. Poland 3. Turkey 4. Netherlands 5. China 6. Italy 7. Slovakia 8. Austria 9. USA	20% 13% 11% 8% 6% 5% 5% 3% 2.9%	
Distilled Spirits (HS Group 2208) Total imports: \$244,342 From USA: \$11,679	1. Ireland 2. Germany 3. U.K. 4. Netherlands 5. Italy 6. Slovakia 7. France 8. USA	12% 11% 10.5% 8.% 7.5% 6% 5% 4.8%	There is competition from products produced in EU countries. However, U.S. origin products are very popular on the Czech market.
Seafood products (HS Commodity Group 03) Total imports: \$371,093 From USA: \$10,611	1. Norway 2. Germany 3. Vietnam 4. Poland 5. Netherlands 6. China 7. USA	52% 6% 5% 4% 4% 3% 3%	The landlocked country depends on imports of Alaska pollack, hake, wild salmon, cod, shrimp.
Beef and beef products (HS Commodity 0201) Total imports: \$258,266 From USA: \$6,329	1. Netherlands 2. Poland 3. Germany 4. Ireland 5. Austria 6. Spain 7. Argentina 8. USA	25% 24% 11% 10% 6% 4% 3% 2.5%	Grain-fed and marbled beef is in high demand in fine dining food service. Imports from the Netherlands and Germany very likely include re-export of U.S. origin beef.

Hops (HS Commodity 1210) Total imports: \$7,418 From USA: \$2,648	1. USA 2. Germany 3. Ukraine	36% 34% 11%	Hops is a key ingredient for beer, the most popular Czech beverage. There is significant demand for high quality aroma hops varieties for local craft beer making.
Pet Food (HS 2309) Total imports: \$810,351 From USA: \$11,644	1. Germany 2. Poland 3. Netherlands 4. U.K. 5. France 6. Hungary 7. Austria 14. USA	31% 11% 8% 7% 6% 5% 4.5% 1.5%	There is continuous demand for high quality pet food as pet ownership is a significant aspect of life in Czechia with a notable number of households owning pets, mostly cats and dogs.

Source: Trade Data Monitor

SECTION IV. BEST PRODUCT PROSPECTS CATEGORIES

Top Consumer-Oriented Products Imported from the World:

- Pork
- Food Preparations
- Beef
- Exotic Fruits

Top Consumer-Oriented Products Imported from the United States:

- Tree Nuts
- Food Preparations
- Distilled Spirits
- Seafood

Products Present in Market with Good Sales Potential:

- Nuts and dried fruits
- Sauces and condiments
- Seafood
- Snack foods and confectionary
- Beef
- Wine
- Hops

Products Not Present in Market with Good Sales Potential:

- Sweet Potatoes
- Sweet Corn

Products Not Present in Market due to Significant Barriers:

- Specialty products containing non-EU approved GMO derived ingredients
- Beef from plants that are not EU approved
- Poultry

SECTION V. KEY CONTACTS AND FURTHER INFORMATION

Homepages of potential interest to the U.S. food and beverage exporters are listed below:

Foreign Agricultural Service Prague	https://cz.usembassy.gov/embassy/government-agencies/foreign-agricultural-service/
Foreign Agricultural Service Washington	http://www.fas-usda.gov
USDA/FAS/Europe	http://www.fas-europe.org
U.S. Mission to the European Union	http://www.usda-eu.org
European Importer Directory	http://www.american-foods.org/

U.S. exporters can contact the governmental trade promotion agency [CzechTrade](#), which offers a business partner search assistance.

Please view our [Country](#) website for more information on exporting U.S. food and beverage products to the Czech Republic and Slovakia, including market and product “briefs” available on specific topics of interest to U.S. exporters.

If you have questions or comments regarding this report, or need assistance exporting to the Czech Republic, please contact the U.S. Foreign Agricultural Service Office in Prague at the following address:

Foreign Agricultural Service

U.S. Embassy Prague

Trziste 15, 11801 Prague

Tel: (420) 257 022 393; E-Mail: AgPrague@fas.usda.gov

Attachments:

No Attachments.