



# Consumer Foodservice in Belgium

March 2026

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## Consumer Foodservice in Belgium

### EXECUTIVE SUMMARY

Rising prices and digital convenience impact Belgium's foodservice industry

### KEY DATA FINDINGS

#### INDUSTRY PERFORMANCE

Consumer foodservice shows modest value growth amid decline in transactions

Online delivery gains momentum

Leading operators seek to strengthen customer loyalty

#### WHAT'S NEXT?

Sluggish performance amid ongoing consumer caution

Innovation will continue apace

Advancement of sustainability initiatives, ahead of EU packaging regulations

#### COMPETITIVE LANDSCAPE

McDonald's leads Belgian consumer foodservice as limited-service chains expand through scale

Burger King leads growth

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Specialist coffee and tea shops lead growth  
Eat-in dominates but online delivery gains traction

#### WHAT'S NEXT?

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Price-driven growth amid challenging consumer habits

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Full-service restaurants see falling customer traffic  
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Eat-in dominates, while delivery gains momentum

#### WHAT'S NEXT?

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Plant-based fine dining will gain traction

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#### INDUSTRY PERFORMANCE

Limited-service restaurants gain ground amid busy lifestyles and price sensitivity

Chicken LSRs lead growth

Online delivery continues rapid growth

#### WHAT'S NEXT?

Lifestyle trends and ongoing consumer price sensitivity will drive growth

LSR fulfilment will continue to evolve

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#### 2025 DEVELOPMENTS

Lunch Garden bankruptcy destabilises the category

#### INDUSTRY PERFORMANCE

Bankruptcy of Lunch Garden weighs heavily on self-service cafeterias

Chained self-service cafeterias dominate sales

Eat-in dominates as digital fulfilment struggles to gain traction

#### WHAT'S NEXT?

Self-service cafeterias to experience more stable performance

Relaunch of Lunch Garden could boost online delivery

Ikea blends foodservice with retail

#### COMPETITIVE LANDSCAPE

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#### 2025 DEVELOPMENTS

Flat sales amid cost pressures

#### INDUSTRY PERFORMANCE

Innovation persists amid sluggish performance

Food trucks trade quality for cost-efficiency

Eat-in remains dominant, while hybrid models gain traction

#### WHAT'S NEXT?

Declining sales amid rising competition

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[Consumer Foodservice By Location in Belgium](#)

## KEY DATA FINDINGS

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Retail drives non-standalone growth while standalone faces challenges

## INDUSTRY PERFORMANCE

Retail locations drive growth as malls turn to dining-led experiences

Standalone outlets face ongoing challenges

Delivery and takeaway expands in standalone foodservice

## WHAT'S NEXT?

Retail to lead non-standalone growth

Standalone set for decline despite premiumisation

Lodging foodservice will face short-term pressure alongside shift towards experience-led concepts

Gen Z to drive digital experiences in retail and travel locations

## COMPETITIVE LANDSCAPE

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McDonald's expands its footprint in standalone locations

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