



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

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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?

Independent cafés face challenges, while specialist coffee and tea shops will maintain momentum
Online ordering will gain importance

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INDUSTRY PERFORMANCE

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Latin American and Italian concepts grow in popularity
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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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

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Food trucks trade quality for cost-efficiency

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WHAT'S NEXT?

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KEY DATA FINDINGS

2025 DEVELOPMENTS

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

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COMPETITIVE LANDSCAPE

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