



Consumer Foodservice By Location in Greece

March 2026

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KEY DATA FINDINGS

2025 DEVELOPMENTS

Travel and lodging lead Greek foodservice growth as standalone and leisure segments decline in 2025

INDUSTRY PERFORMANCE

Travel and lodging lead growth among non-standalone locations

Standalone outlets decline as consumers cut back on spending

Retail and leisure locations suffer from shrinking footfall and lower spend

WHAT'S NEXT?

Travel and lodging set to remain the most dynamic non-standalone locations

Standalone outlets expected to recover as prices drive value growth

Demographics and mobility trends to reshape foodservice demand across locations

COMPETITIVE LANDSCAPE

Vivartia leads non-standalone locations with strong multi-brand presence

Vivartia leads standalone locations with diverse portfolio and acquisitions

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EXECUTIVE SUMMARY

Inflation spurs shift to delivery and limited-service dining in Greek foodservice in 2025

KEY DATA FINDINGS

INDUSTRY PERFORMANCE

Inflation pressures continue to weigh on foodservice performance

Rise of home delivery and takeaway is reshaping innovation and competition

Loyalty programmes gain traction among chained and independent operators

WHAT'S NEXT?

Innovation to focus on limited-service restaurants for growth

Vegan and vegetarian demand will expand plant-based menus

Sustainability to become a competitive advantage for operators

COMPETITIVE LANDSCAPE

Independent operators dominate Greek foodservice

Il Toto posts fastest growth through outlet expansion

Chains invest heavily to capture shrinking consumer spending

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Emerging trends in burger and ice cream limited-service restaurants reflect innovation and investment

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