



Consumer Foodservice in Greece

March 2026

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Consumer Foodservice in Greece

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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Intensifying pressure on independents amidst rising chain investment
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Greek cafés/bars face rising coffee costs, fierce competition, and shift to takeaway in 2025

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Coffee price hikes squeeze margins and reduce transaction volumes

Independent coffee specialists lead growth despite fierce competition
Delivery and takeaway surge as eat-in declines under tax hikes

WHAT'S NEXT?

Optimistic growth forecast for Greek café/bar sales amid evolving consumer preferences
Delivery and takeaway to dominate as sit-in spaces shrink further
Cold brew, bubble tea and tap rooms will lead innovation

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2025 DEVELOPMENTS

Full-service restaurants in Greece face declining sales but see growth through chains and delivery partnerships

INDUSTRY PERFORMANCE

Full-service restaurants lose value as dining out declines
Chained European and Asian formats drive growth through new openings
Delivery partnerships with aggregators sustain revenue amid shrinking footfall

WHAT'S NEXT?

Modest recovery expected as menu price hikes boost value, though growth will remain negative
Delivery share set to rise while takeaway faces pressure
Sustainability to emerge as a premiumisation strategy in full-service dining

COMPETITIVE LANDSCAPE

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- Delivery and drive-through expand as operators prioritise convenience

WHAT'S NEXT?

- Niche concepts and world cuisines drive future outlet expansion
- Delivery set to grow as eat-in declines further
- Premiumisation reshapes menus to boost transaction value

COMPETITIVE LANDSCAPE

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Chained self-service cafeterias in Greece drive value growth as tourist spending habits change.

INDUSTRY PERFORMANCE

Self-service cafeterias struggle as tourist spending tightens
Chains hold minimal share as independents dominate travel locations
Bread Factory disrupts the category with takeaway and delivery options

WHAT'S NEXT?

Tourism trends will remain key determinant of category performance
Eat-in will remain dominant as delivery potential is limited
Outdated format and location constraints hinder growth prospects

COMPETITIVE LANDSCAPE

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INDUSTRY PERFORMANCE

Street stalls/kiosks lose relevance due to a lack of development and innovation
Bakery chains offering sesame rings intensify competition with street stalls
Takeaway-only model and standardised pricing limit growth potential

WHAT'S NEXT?

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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

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