



Consumer Foodservice By Location in Belgium

March 2026

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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

Gen Z to drive digital experiences in retail and travel locations

COMPETITIVE LANDSCAPE

Panos remains key player in non-standalone locations

McDonald's expands its footprint in standalone locations

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[Consumer Foodservice in Belgium - Industry Overview](#)

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

Deli NV expands network

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