

# Consumer Foodservice in Greece

February 2024

Table of Contents

### EXECUTIVE SUMMARY

Consumer foodservice in 2023: The big picture

2023 key trends

Competitive landscape

Independent foodservice developments

What next for consumer foodservice?

### MARKET DATA

Table 1 - Units, Transactions and Value Sales in Consumer Foodservice 2018-2023

Table 2 - Units, Transactions and Value Sales in Consumer Foodservice: % Growth 2018-2023

Table 3 - Consumer Foodservice by Independent vs Chained by Type: Units/Outlets 2023

Table 4 - Consumer Foodservice by Independent vs Chained: % Foodservice Value 2018-2023

Table 5 - Sales in Consumer Foodservice by Food vs Drink Split: % Foodservice Value 2018-2023

Table 6 - Sales in Consumer Foodservice by Food vs Drink Split by Type: % Foodservice Value 2023

Table 7 - Sales in Consumer Foodservice by Location: % Foodservice Value 2018-2023

Table 8 - GBO Company Shares in Chained Consumer Foodservice: % Foodservice Value 2019-2023

Table 9 - GBN Brand Shares in Chained Consumer Foodservice: % Foodservice Value 2020-2023

Table 10 - GBN Brand Shares in Chained Consumer Foodservice: Units/Outlets 2023

Table 11 - Forecast Units, Transactions and Value Sales in Consumer Foodservice 2023-2028

Table 12 - Forecast Units, Transactions and Value Sales in Consumer Foodservice: % Growth 2023-2028

### DISCLAIMER

### SOURCES

Summary 1 - Research Sources

## Cafés/Bars in Greece

### KEY DATA FINDINGS

#### 2023 DEVELOPMENTS

Specialist coffee shops prove more resilient than traditional cafés

Competition continues to intensify in 2023

Target audience determines performance

#### PROSPECTS AND OPPORTUNITIES

Shift to specialist coffee shops hinders growth for cafés

Home delivery set to suffer from decline in disposable incomes

Modernisation speeds up in traditional formats

### CATEGORY DATA

Table 13 - Cafés/Bars by Category: Units/Outlets 2018-2023

Table 14 - Sales in Cafés/Bars by Category: Number of Transactions 2018-2023

Table 15 - Sales in Cafés/Bars by Category: Foodservice Value 2018-2023

Table 16 - Cafés/Bars by Category: % Units/Outlets Growth 2018-2023

Table 17 - Sales in Cafés/Bars by Category: % Transaction Growth 2018-2023

Table 18 - Sales in Cafés/Bars by Category: % Foodservice Value Growth 2018-2023

Table 19 - GBO Company Shares in Chained Cafés/Bars: % Foodservice Value 2019-2023

Table 20 - GBN Brand Shares in Chained Cafés/Bars: % Foodservice Value 2020-2023

Table 21 - Forecast Cafés/Bars by Category: Units/Outlets 2023-2028

Table 22 - Forecast Sales in Cafés/Bars by Category: Number of Transactions 2023-2028

Table 23 - Forecast Sales in Cafés/Bars by Category: Foodservice Value 2023-2028

Table 24 - Forecast Cafés/Bars by Category: % Units/Outlets Growth 2023-2028

Table 25 - Forecast Sales in Cafés/Bars by Category: % Transaction Growth 2023-2028

Table 26 - Forecast Sales in Cafés/Bars by Category: % Foodservice Value Growth 2023-2028

## Full-Service Restaurants in Greece

### KEY DATA FINDINGS

#### 2023 DEVELOPMENTS

Falling disposable incomes and reduced tourism flows take their toll

Fine dining drives development

Fish restaurants dominate other full-service restaurants while African options suffer from low awareness

### PROSPECTS AND OPPORTUNITIES

Outlet closures threaten mature segments

North American, Asian and Latin American full-service restaurants face better prospects than rival segments

Vegan trend set to drive growth in other full-service restaurants

### CATEGORY DATA

Table 27 - Full-Service Restaurants by Category: Units/Outlets 2018-2023

Table 28 - Sales in Full-Service Restaurants by Category: Number of Transactions 2018-2023

Table 29 - Sales in Full-Service Restaurants by Category: Foodservice Value 2018-2023

Table 30 - Full-Service Restaurants by Category: % Units/Outlets Growth 2018-2023

Table 31 - Sales in Full-Service Restaurants by Category: % Transaction Growth 2018-2023

Table 32 - Sales in Full-Service Restaurants by Category: % Foodservice Value Growth 2018-2023

Table 33 - GBO Company Shares in Chained Full-Service Restaurants: % Foodservice Value 2019-2023

Table 34 - GBN Brand Shares in Chained Full-Service Restaurants: % Foodservice Value 2020-2023

Table 35 - Forecast Full-Service Restaurants by Category: Units/Outlets 2023-2028

Table 36 - Forecast Sales in Full-Service Restaurants by Category: Number of Transactions 2023-2028

Table 37 - Forecast Sales in Full-Service Restaurants by Category: Foodservice Value 2023-2028

Table 38 - Forecast Full-Service Restaurants by Category: % Units/Outlets Growth 2023-2028

Table 39 - Forecast Sales in Full-Service Restaurants by Category: % Transaction Growth 2023-2028

Table 40 - Forecast Sales in Full-Service Restaurants by Category: % Foodservice Value Growth 2023-2028

## Limited-Service Restaurants in Greece

### KEY DATA FINDINGS

#### 2023 DEVELOPMENTS

Shrinking disposable incomes boost category's performance

Rising street food culture and novel concepts drive growth

Menu development sees polarised trends

### PROSPECTS AND OPPORTUNITIES

Premiumisation and fast casual trends will shape category progress

Room for growth in world cuisines

Fitness trends and growing vegan population open up opportunities for expansion

### CATEGORY DATA

Table 41 - Limited-Service Restaurants by Category: Units/Outlets 2018-2023

Table 42 - Sales in Limited-Service Restaurants by Category: Number of Transactions 2018-2023

Table 43 - Sales in Limited-Service Restaurants by Category: Foodservice Value 2018-2023

Table 44 - Limited-Service Restaurants by Category: % Units/Outlets Growth 2018-2023

Table 45 - Sales in Limited-Service Restaurants by Category: % Transaction Growth 2018-2023

Table 46 - Sales in Limited-Service Restaurants by Category: % Foodservice Value Growth 2018-2023

Table 47 - GBO Company Shares in Chained Limited-Service Restaurants: % Foodservice Value 2019-2023

Table 48 - GBN Brand Shares in Chained Limited-Service Restaurants: % Foodservice Value 2020-2023

Table 49 - Forecast Limited-Service Restaurants by Category: Units/Outlets 2023-2028

Table 50 - Forecast Sales in Limited-Service Restaurants by Category: Number of Transactions 2023-2028

Table 51 - Forecast Sales in Limited-Service Restaurants by Category: Foodservice Value 2023-2028

Table 52 - Forecast Limited-Service Restaurants by Category: % Units/Outlets Growth 2023-2028

Table 53 - Forecast Sales in Limited-Service Restaurants by Category: % Transaction Growth 2023-2028

Table 54 - Forecast Sales in Limited-Service Restaurants by Category: % Foodservice Value Growth 2023-2028

## Self-Service Cafeterias in Greece

### KEY DATA FINDINGS

#### 2023 DEVELOPMENTS

Reduced tourist flows undermine growth of independent operators

Ikea shifts towards limited-service restaurants

Low investment impacts performance

### PROSPECTS AND OPPORTUNITIES

Fluctuations in tourist flows will determine future for category players

Limited potential for outlet expansion

Current trends unfavourable for development in self-service cafeterias

### CATEGORY DATA

Table 55 - Self-Service Cafeterias: Units/Outlets 2018-2023

Table 56 - Sales in Self-Service Cafeterias: Number of Transactions 2018-2023

Table 57 - Sales in Self-Service Cafeterias: Foodservice Value 2018-2023

Table 58 - Sales in Self-Service Cafeterias: % Units/Outlets Growth 2018-2023

Table 59 - Sales in Self-Service Cafeterias: % Transaction Growth 2018-2023

Table 60 - Sales in Self-Service Cafeterias: % Foodservice Value Growth 2018-2023

Table 61 - GBO Company Shares in Chained Self-Service Cafeterias: % Foodservice Value 2019-2023

Table 62 - GBN Brand Shares in Chained Self-Service Cafeterias: % Foodservice Value 2020-2023

Table 63 - Forecast Self-Service Cafeterias: Units/Outlets 2023-2028

Table 64 - Forecast Sales in Self-Service Cafeterias: Number of Transactions 2023-2028

Table 65 - Forecast Sales in Self-Service Cafeterias: Foodservice Value 2023-2028

Table 66 - Forecast Self-Service Cafeterias: % Units/Outlets Growth 2023-2028

Table 67 - Forecast Sales in Self-Service Cafeterias: % Transaction Growth 2023-2028

Table 68 - Forecast Sales in Self-Service Cafeterias: % Foodservice Value Growth 2023-2028

## Street Stalls/Kiosks in Greece

### KEY DATA FINDINGS

#### 2023 DEVELOPMENTS

Festivals and events drive growth

Food festivals contribute to overall growth and value rises

Dated formats face competitive threat from limited-service restaurants

### PROSPECTS AND OPPORTUNITIES

Rise of street food culture forecast

Legislation does not benefit street stalls/kiosks

Traditional formats to fade away

### CATEGORY DATA

Table 69 - Street Stalls/Kiosks: Units/Outlets 2018-2023

Table 70 - Sales in Street Stalls/Kiosks: Number of Transactions 2018-2023

Table 71 - Sales in Street Stalls/Kiosks: Foodservice Value 2018-2023

Table 72 - Street Stalls/Kiosks: % Units/Outlets Growth 2018-2023

Table 73 - Sales in Street Stalls/Kiosks: % Transaction Growth 2018-2023

Table 74 - Sales in Street Stalls/Kiosks: % Foodservice Value Growth 2018-2023

Table 75 - GBN Brand Shares in Chained Street Stalls/Kiosks: % Foodservice Value 2020-2023

Table 76 - Forecast Street Stalls/Kiosks: Units/Outlets 2023-2028

Table 77 - Forecast Sales in Street Stalls/Kiosks: Number of Transactions 2023-2028

Table 78 - Forecast Sales in Street Stalls/Kiosks: Foodservice Value 2023-2028

Table 79 - Forecast Street Stalls/Kiosks: % Units/Outlets Growth 2023-2028

Table 80 - Forecast Sales in Street Stalls/Kiosks: % Transaction Growth 2023-2028

Table 81 - Forecast Sales in Street Stalls/Kiosks: % Foodservice Value Growth 2023-2028

## Consumer Foodservice By Location in Greece

### KEY DATA FINDINGS

#### 2023 DEVELOPMENTS

Travel and lodging hit by falling tourist flows

Leisure and retail suffer from decline in disposable incomes

Chains dominate non-standalone locations

#### PROSPECTS AND OPPORTUNITIES

Hybrid outlets as an emerging trend

Tourism still offers opportunities for travel and lodging

#### CATEGORY DATA

Table 82 - Consumer Foodservice by Location: Units/Outlets 2018-2023

Table 83 - Sales in Consumer Foodservice by Location: Number of Transactions 2018-2023

Table 84 - Sales in Consumer Foodservice by Location: Foodservice Value 2018-2023

Table 85 - Consumer Foodservice by Location: % Units/Outlets Growth 2018-2023

Table 86 - Sales in Consumer Foodservice by Location: % Transaction Growth 2018-2023

Table 87 - Sales in Consumer Foodservice by Location: % Foodservice Value Growth 2018-2023

Table 88 - Consumer Foodservice through Standalone: Units/Outlets 2018-2023

Table 89 - Sales in Consumer Foodservice through Standalone: Number of Transactions 2018-2023

Table 90 - Sales in Consumer Foodservice through Standalone: Foodservice Value 2018-2023

Table 91 - Consumer Foodservice through Standalone: % Units/Outlets Growth 2018-2023

Table 92 - Sales in Consumer Foodservice through Standalone: % Transaction Growth 2018-2023

Table 93 - Sales in Consumer Foodservice through Standalone: % Foodservice Value Growth 2018-2023

Table 94 - Consumer Foodservice through Leisure: Units/Outlets 2018-2023

Table 95 - Sales in Consumer Foodservice through Leisure: Number of Transactions 2018-2023

Table 96 - Sales in Consumer Foodservice through Leisure: Foodservice Value 2018-2023

Table 97 - Consumer Foodservice through Leisure: % Units/Outlets Growth 2018-2023

Table 98 - Sales in Consumer Foodservice through Leisure: % Transaction Growth 2018-2023

Table 99 - Sales in Consumer Foodservice through Leisure: % Foodservice Value Growth 2018-2023

Table 100 - Consumer Foodservice through Retail: Units/Outlets 2018-2023

Table 101 - Sales in Consumer Foodservice through Retail: Number of Transactions 2018-2023

Table 102 - Sales in Consumer Foodservice through Retail: Foodservice Value 2018-2023

Table 103 - Consumer Foodservice through Retail: % Units/Outlets Growth 2018-2023

Table 104 - Sales in Consumer Foodservice through Retail: % Transaction Growth 2018-2023

Table 105 - Sales in Consumer Foodservice through Retail: % Foodservice Value Growth 2018-2023

Table 106 - Consumer Foodservice through Lodging: Units/Outlets 2018-2023

Table 107 - Sales in Consumer Foodservice through Lodging: Number of Transactions 2018-2023

Table 108 - Sales in Consumer Foodservice through Lodging: Foodservice Value 2018-2023

Table 109 - Consumer Foodservice through Lodging: % Units/Outlets Growth 2018-2023

Table 110 - Sales in Consumer Foodservice through Lodging: % Transaction Growth 2018-2023

Table 111 - Sales in Consumer Foodservice through Lodging: % Foodservice Value Growth 2018-2023

Table 112 - Consumer Foodservice through Travel: Units/Outlets 2018-2023

Table 113 - Sales in Consumer Foodservice through Travel: Number of Transactions 2018-2023

Table 114 - Sales in Consumer Foodservice through Travel: Foodservice Value 2018-2023

Table 115 - Consumer Foodservice through Travel: % Units/Outlets Growth 2018-2023

Table 116 - Sales in Consumer Foodservice through Travel: % Transaction Growth 2018-2023

Table 117 - Sales in Consumer Foodservice through Travel: % Foodservice Value Growth 2018-2023

Table 118 - Forecast Consumer Foodservice by Location: Units/Outlets 2023-2028

Table 119 - Forecast Sales in Consumer Foodservice by Location: Number of Transactions 2023-2028

Table 120 - Forecast Sales in Consumer Foodservice by Location: Foodservice Value 2023-2028

Table 121 - Forecast Consumer Foodservice by Location: % Units/Outlets Growth 2023-2028

Table 122 - Forecast Sales in Consumer Foodservice by Location: % Transaction Growth 2023-2028

Table 123 - Forecast Sales in Consumer Foodservice by Location: % Foodservice Value Growth 2023-2028

Table 124 - Forecast Consumer Foodservice through Standalone: Units/Outlets 2023-2028

Table 125 - Forecast Sales in Consumer Foodservice through Standalone: Number of Transactions 2023-2028

Table 126 - Forecast Sales in Consumer Foodservice through Standalone: Foodservice Value 2023-2028

Table 127 - Forecast Consumer Foodservice through Standalone: % Units/Outlets Growth 2023-2028

Table 128 - Forecast Sales in Consumer Foodservice through Standalone: % Transaction Growth 2023-2028

Table 129 - Forecast Sales in Consumer Foodservice through Standalone: % Foodservice Value Growth 2023-2028

Table 130 - Forecast Consumer Foodservice through Leisure: Units/Outlets 2023-2028

Table 131 - Forecast Sales in Consumer Foodservice through Leisure: Number of Transactions 2023-2028

Table 132 - Forecast Sales in Consumer Foodservice through Leisure: Foodservice Value 2023-2028

Table 133 - Forecast Consumer Foodservice through Leisure: % Units/Outlets Growth 2023-2028

Table 134 - Forecast Sales in Consumer Foodservice through Leisure: % Transaction Growth 2023-2028

Table 135 - Forecast Sales in Consumer Foodservice through Leisure: % Foodservice Value Growth 2023-2028

Table 136 - Forecast Consumer Foodservice through Retail: Units/Outlets 2023-2028

Table 137 - Forecast Sales in Consumer Foodservice through Retail: Number of Transactions 2023-2028

Table 138 - Forecast Sales in Consumer Foodservice through Retail: Foodservice Value 2023-2028

Table 139 - Forecast Consumer Foodservice through Retail: % Units/Outlets Growth 2023-2028

Table 140 - Forecast Sales in Consumer Foodservice through Retail: % Transaction Growth 2023-2028

Table 141 - Forecast Sales in Consumer Foodservice through Retail: % Foodservice Value Growth 2023-2028

Table 142 - Forecast Consumer Foodservice through Lodging: Units/Outlets 2023-2028

Table 143 - Forecast Sales in Consumer Foodservice through Lodging: Number of Transactions 2023-2028

Table 144 - Forecast Sales in Consumer Foodservice through Lodging: Foodservice Value 2023-2028

Table 145 - Forecast Consumer Foodservice through Lodging: % Units/Outlets Growth 2023-2028

Table 146 - Forecast Sales in Consumer Foodservice through Lodging: % Transaction Growth 2023-2028

Table 147 - Forecast Sales in Consumer Foodservice through Lodging: % Foodservice Value Growth 2023-2028

Table 148 - Forecast Consumer Foodservice through Travel: Units/Outlets 2023-2028

Table 149 - Forecast Sales in Consumer Foodservice through Travel: Number of Transactions 2023-2028

Table 150 - Forecast Sales in Consumer Foodservice through Travel: Foodservice Value 2023-2028

Table 151 - Forecast Consumer Foodservice through Travel: % Units/Outlets Growth 2023-2028

Table 152 - Forecast Sales in Consumer Foodservice through Travel: % Transaction Growth 2023-2028

Table 153 - Forecast Sales in Consumer Foodservice through Travel: % Foodservice Value Growth 2023-2028

## About Euromonitor International

Euromonitor International is an independent market intelligence provider. Data, insight and analysis stem from in-the-field research spanning 210 national markets.

Content ranges from the in-depth and country-specific, to key strategic themes with a global range and significance. Products cover a comprehensive range of insights and market data, but can be broadly categorised as:

- **Strategy Briefings:** Global or regional in scope, and focussing on the most important themes shaping consumer demand, the key markets, competitive environment and future outlook across a range of industries.
- **Company Profiles:** Analysis dedicated to the world's most significant companies, with detailed insight into their activities, focus of operations, their competitors, their geographic presence and performance.
- **Country Reports:** For an in-depth understanding of specific countries, whether by industry, economic metrics or consumer trends and lifestyles. These reports cover current trends, consumer demand, market potential and future prospects, with country-specific local insight and comprehensive data, unavailable elsewhere.

For more information on this report, further enquiries can be directed via this link [www.euromonitor.com/consumer-foodservice-in-greece/report](http://www.euromonitor.com/consumer-foodservice-in-greece/report).