



# Limited-Service Restaurants in Western Europe

May 2021

Table of Contents

## INTRODUCTION

Scope

Key findings

## REGIONAL OVERVIEW

Western Europe underperforming the global averages

Return to pre-COVID-19 sales levels not expected until 2025

UK and Italy lose almost USD10 billion in sales between them in 2020

Convenience stores LSR record positive growth in the UK in 2020

France adds the most new value sales over 2015-2020

Eat-in's share dives as pandemic drives takeaway/home delivery sales

Standalone continues to dominate consumer foodservice distribution

Leisure, lodging and travel lose almost half their sales in 2020

## LEADING COMPANIES AND BRANDS

Leading players increase their shares in 2020

Big players planning further expansion

UK the major revenue generator for top 10 players

McDonald's continues to be out on its own as the leading LSR brand

## FORECAST PROJECTIONS

UK to add the most new sales in 2020-2025...

...but will not return to 2019 levels by the end of the forecast period

## COUNTRY SNAPSHOTS

Austria: Market Context

Austria: Competitive and Retail Landscape

Belgium: Market Context

Belgium: Competitive and Retail Landscape

Denmark: Market Context

Denmark: Competitive and Retail Landscape

Finland: Market Context

Finland: Competitive and Retail Landscape

France: Market Context

France: Competitive and Retail Landscape

Germany: Market Context

Germany: Competitive and Retail Landscape

Greece: Market Context

Greece: Competitive and Retail Landscape

Ireland: Market Context

Ireland: Competitive and Retail Landscape

Italy: Market Context

Italy: Competitive and Retail Landscape

Netherlands: Market Context

Netherlands: Competitive and Retail Landscape

Norway: Market Context

Norway: Competitive and Retail Landscape

Portugal: Market Context

Portugal: Competitive and Retail Landscape

Spain: Market Context

Spain: Competitive and Retail Landscape

Sweden: Market Context

Sweden: Competitive and Retail Landscape

Switzerland: Market Context

Switzerland: Competitive and Retail Landscape

Turkey: Market Context

Turkey: Competitive and Retail Landscape

UK: Market Context

UK: Competitive and Retail Landscape

## 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/limited-service-restaurants-in-western-europe/report](http://www.euromonitor.com/limited-service-restaurants-in-western-europe/report).