

# Cafés/Bars in Western Europe

May 2022

Table of Contents

## INTRODUCTION

Scope

Key findings

## REGIONAL OVERVIEW

Western Europe accounts for the highest regional cafés/bars sales

Sales will take some time to return to pre-COVID-19 levels

National recoveries start in 2021 after the major losses seen a year earlier

Major losses for Spanish bars/pubs over the historic period

Cafés/bars in Western Europe badly hit by the pandemic

Spain starts to see a strong recovery from summer 2021

Standalone continues to dominate consumer foodservice distribution

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

## LEADING COMPANIES AND BRANDS

Leading players increase their shares in 2020

Starbucks and McDonald's continue adding new outlets in Western Europe

The UK is the major revenue generator for most of the top 10 players

Admiral Taverns' acquisition of Hawthorn moves it back into the top 10 brands

## FORECAST PROJECTIONS

While positive growth is expected throughout the forecast period...

...sales are not expected to reach 2019 levels before the end of 2021-2026

## 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

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