



# Hot Drinks in Western Europe

March 2024

Table of Contents

## INTRODUCTION

Scope

Key findings

## REGIONAL OVERVIEW

Western Europe has the second highest regional sales and per capita consumption

Modest year-on-year growth expected in the coming years

Western Europe has the biggest regional coffee market

Demand in the retail channel remains well above pre-pandemic levels in Germany

Fresh coffee beans recording strong growth in France over 2018-2023

Coffee adds the bulk of the new value generated over 2018-2023

Inflation hitting consumers' purchasing power but failing to halt the premiumisation trend

Modern grocery retailers dominate hot drinks distribution in Western Europe

Discounters gaining share as rising prices impact consumer spending

## LEADING COMPANIES AND BRANDS

Hot drinks has relatively concentrated competitive landscapes in most countries

JDE Peet's acquires Les 2 Marmottes in France

Private label has USD1 billion more sales in Germany than in the next biggest market

German tea brand Teekanne moving up the Western European rankings

## FORECAST PROJECTIONS

Modest year-on-year growth expected in real value terms over 2023-2028

Continued polarisation likely, particularly in the short term

## 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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