



Cafés/Bars in Western Europe

May 2022

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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

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Austria: Competitive and Retail Landscape

Belgium: Market Context

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UK: Competitive and Retail Landscape

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