Full-Service Restaurants in Western Europe

May 2023

Table of Contents

INTRODUCTION

Scope

Key findings

REGIONAL OVERVIEW

Sales decline in all regions amidst COVID-19; per capita spending highest in North America

Recovery ongoing after awful 2020, but no recovery to pre-pandemic sales levels

Huge impact of lockdowns in 2020 on sales, particularly for European FSRs

Negative or stagnant growth pervades across categories and countries, with a few exceptions

Biggest absolute declines seen in European FSRs, though all categories see reductions

Multitude of factors pose strong challenge to FSRs in Western Europe

Rise in home delivery and takeaway; growing demand for local, sustainable and healthy diets

Standalone channel dominates across the region, other channels recover after 2020

Retail and lodging channels recover strongly following 2020

Travel channel recovering after 2020 as mobility increases

LEADING COMPANIES AND BRANDS

Diverse market for FSRs across Western Europe with many companies present

Largest companies see rebound in share after 2020

Largest FSR companies have their greatest presence in the biggest markets

Wagamama rises to top of the rankings, three new companies enter the top 10

FORECAST PROJECTIONS

Growth seen, but mainly as a result of recovery following the falls in 2020

Transactions unlikely to return to 2019 levels as consumers move elsewhere

FSR outlet numbers to remain stagnant, while LSR numbers increase

Middle Eastern FSRs to see highest growth but European to remain dominant in actual size

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

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