

Limited-Service Restaurants in Eastern Europe

May 2021

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REGIONAL OVERVIEW

Eastern Europe has the lowest regional sales level

Return to pre-COVID-19 sales levels not expected until 2023

Poland adds the most new retail value over the 2015-2020 period

Convenience store outlet numbers continue to grow in Poland in 2020

Burger LSR channel adds the most new value over 2015-2020

Pandemic drives the development of takeaway/home delivery

Standalone continues to dominate consumer foodservice distribution

Mall foodservice outlets among some of the hardest hit by COVID-19

LEADING COMPANIES AND BRANDS

Leading players increase their shares in 2020

McDonald's, KFC and Burger King continue expanding

Russia and Poland the main revenue generators for the top 10 players

McDonald's remains a strong leading LSR brand in 2020

FORECAST PROJECTIONS

Eastern Europe to return to positive growth rates in 2021...

...but will not return to pre-COVID-19 sales levels until 2023

COUNTRY SNAPSHOTS

Bulgaria: Market Context

Bulgaria: Competitive and Retail Landscape

Czech Republic: Market Context

Czech Republic: Competitive and Retail Landscape

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