

Hot Drinks in Western Europe

March 2024

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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

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Austria: Competitive and Retail Landscape

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