



**Euromonitor
International**

Consumer Foodservice in Western Europe

May 2024

Table of Contents

INTRODUCTION

Scope

Key findings

REGIONAL OVERVIEW

Western Europe has the highest regional sales in self-service cafeterias and cafés/bars

Western Europe is third in terms of both value sales and average per capita spend

Positive but slowing growth expected in the coming years

Chains and limited-service restaurants the best performers over 2018-2023

Strong growth for self-service cafeterias in Spain in 2023

Pandemic provides a major boost to sales via delivery

LSR manages to grow as FSR and cafés/bars rack up massive losses

Recovery from the pandemic slows in 2023 due to persistently high inflation

Staff shortages a problem post-pandemic in a number of countries

LEADING COMPANIES AND BRANDS

Consumer foodservice remains a fragmented competitive landscape

Pandemic helped cement the leading position of McDonald's in Western Europe

UK the largest market for most of the Western European top 10 players

No changes in the top 10 brand rankings

FORECAST PROJECTIONS

Positive value sales growth expected throughout the forecast period

Ghost kitchens an emerging trend in the Spanish market

Digitalisation and home delivery/takeaway expected to continue developing

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

About Euromonitor International

Euromonitor International is an independent market intelligence provider. Data, insight and analysis stem from in-the-field research spanning 210 national markets.

Content ranges from the in-depth and country-specific, to key strategic themes with a global range and significance. Products cover a comprehensive range of insights and market data, but can be broadly categorised as:

- **Strategy Briefings:** Global or regional in scope, and focussing on the most important themes shaping consumer demand, the key markets, competitive environment and future outlook across a range of industries.
- **Company Profiles:** Analysis dedicated to the world's most significant companies, with detailed insight into their activities, focus of operations, their competitors, their geographic presence and performance.
- **Country Reports:** For an in-depth understanding of specific countries, whether by industry, economic metrics or consumer trends and lifestyles. These reports cover current trends, consumer demand, market potential and future prospects, with country-specific local insight and comprehensive data, unavailable elsewhere.

For more information on this report, further enquiries can be directed via this link www.euromonitor.com/consumer-foodservice-in-western-europe/report.