



Consumer Foodservice in Western Europe

May 2024

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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

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Finland: Market Context

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UK: Competitive and Retail Landscape

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