

# EUROPEAN BRANDED COFFEE SHOP MARKET IN NUMBERS



## Allegra PROJECT CAFÉ EUROPE 2020

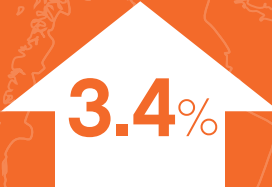
### MARKET SIZE

Total branded coffee shop outlets\*

 **37,598**

### MARKET GROWTH

Total branded coffee shop outlet growth over the last 12 months

 **3.4%**

### LARGEST MARKETS

Largest markets by number of branded outlets



8,222



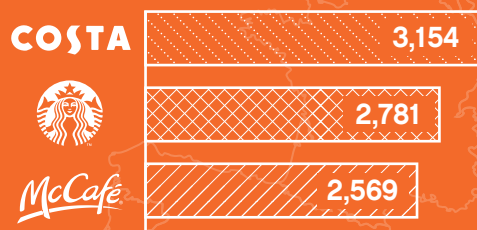
5,586



3,523

### LEADING COFFEE SHOP BRANDS

By total number of outlets across 24 key markets



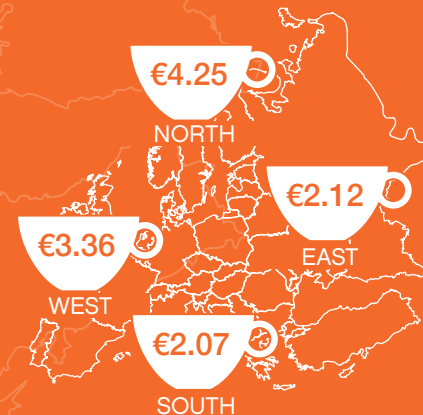
### FASTEST GROWING MARKETS

Fastest growing markets by annual outlet growth rate % over the last 12 months\*\*



### TYPICAL PRICE

Typical price of a regular cappuccino across top 5 operators in 24 key markets



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\*Covers all 48 European markets

\*\*Across the 30 largest markets