



Passport

Cafés/Bars in Slovakia

Euromonitor International

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purposes only.

Some content and data have been
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CAFÉS/BARS IN SLOVAKIA - CATEGORY ANALYSIS

KEY DATA FINDINGS

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2023 DEVELOPMENTS

Higher-end bars/pubs growing in popularity

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Independent outlets dominate in cafés/bars

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Sustainability a growing trend

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PROSPECTS AND OPPORTUNITIES

Specialist coffee shops see healthy growth

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Continued premiumisation of bars/pubs

Content removed from sample

Delivery options adds value to customer experience

Content removed from sample

CATEGORY DATA

Table 1 Cafés/Bars by Category: Units/Outlets 2018-2023

outlets	2018	2019	2020	2021	2022	2023
<ul style="list-style-type: none"> - Bars/Pubs -- Chained Bars/Pubs -- Independent Bars/Pubs - Cafés -- Chained Cafés -- Independent Cafés - Juice/Smoothie Bars -- Chained Juice/Smoothie Bars -- Independent Juice/Smoothie Bars - Specialist Coffee and Tea Shops -- Chained Specialist Coffee and Tea Shops -- Independent Specialist Coffee and Tea Shops - Chained Cafés/Bars - Independent Cafés/Bars 	Data removed from sample					

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 2 Sales in Cafés/Bars by Category: Number of Transactions 2018-2023

'000 transactions	2018	2019	2020	2021	2022	2023
- Bars/Pubs	Data removed from sample					
-- Chained Bars/Pubs						
-- Independent Bars/Pubs						
- Cafés						
-- Chained Cafés						
-- Independent Cafés						
- Juice/Smoothie Bars						
-- Chained Juice/Smoothie Bars						
-- Independent Juice/Smoothie Bars						
- Specialist Coffee and Tea Shops						
-- Chained Specialist Coffee and Tea Shops						
-- Independent Specialist Coffee and Tea Shops						
- Chained Cafés/Bars						
- Independent Cafés/Bars						
Cafés/Bars						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 3 Sales in Cafés/Bars by Category: Foodservice Value 2018-2023

EUR million	2018	2019	2020	2021	2022	2023
- Bars/Pubs	Data removed from sample					
-- Chained Bars/Pubs						
-- Independent Bars/Pubs						
- Cafés						
-- Chained Cafés						
-- Independent Cafés						
- Juice/Smoothie Bars						
-- Chained Juice/Smoothie Bars						
-- Independent Juice/Smoothie Bars						
- Specialist Coffee and Tea Shops						
-- Chained Specialist Coffee and Tea Shops						
-- Independent Specialist Coffee and Tea Shops						
- Chained Cafés/Bars						
- Independent Cafés/Bars						

Cafés/Bars

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 4 Cafés/Bars by Category: % Units/Outlets Growth 2018-2023

% Units/Outlets growth

2022/23

2018-23 CAGR

2018/23 Total

- Bars/Pubs
- Chained Bars/Pubs
- Independent Bars/Pubs
- Cafés
- Chained Cafés
- Independent Cafés
- Juice/Smoothie Bars
- Chained Juice/Smoothie Bars
- Independent Juice/Smoothie Bars
- Specialist Coffee and Tea Shops
- Chained Specialist Coffee and Tea Shops
- Independent Specialist Coffee and Tea Shops
- Chained Cafés/Bars
- Independent Cafés/Bars
- Cafés/Bars

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 5 Sales in Cafés/Bars by Category: % Transaction Growth 2018-2023

% transaction growth

2022/23

2018-23 CAGR

2018/23 Total

- Bars/Pubs
- Chained Bars/Pubs
- Independent Bars/Pubs
- Cafés
- Chained Cafés
- Independent Cafés
- Juice/Smoothie Bars
- Chained Juice/Smoothie Bars
- Independent Juice/Smoothie Bars
- Specialist Coffee and Tea Shops
- Chained Specialist Coffee and Tea Shops
- Independent Specialist Coffee and Tea Shops
- Chained Cafés/Bars
- Independent Cafés/Bars
- Cafés/Bars

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 6 Sales in Cafés/Bars by Category: % Foodservice Value Growth 2018-2023

% value growth

2022/23

2018-23 CAGR

2018/23 Total

- Bars/Pubs
 - Chained Bars/Pubs
 - Independent Bars/Pubs
 - Cafés
 - Chained Cafés
 - Independent Cafés
 - Juice/Smoothie Bars
 - Chained Juice/Smoothie Bars
 - Independent Juice/Smoothie Bars
 - Specialist Coffee and Tea Shops
 - Chained Specialist Coffee and Tea Shops
 - Independent Specialist Coffee and Tea Shops
 - Chained Cafés/Bars
 - Independent Cafés/Bars
- Cafés/Bars

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 7 GBO Company Shares in Chained Cafés/Bars: % Foodservice Value 2019-2023

% value Company	2019	2020	2021	2022	2023
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Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 8 GBN Brand Shares in Chained Cafés/Bars: % Foodservice Value 2020-2023

% value Brand	Global Brand Owner	2020	2021	2022	2023
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Data removed from sample

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 9 Forecast Cafés/Bars by Category: Units/Outlets 2023-2028

outlets	2023	2024	2025	2026	2027	2028
- Bars/Pubs	Data removed from sample					
-- Chained Bars/Pubs						
-- Independent Bars/Pubs						
- Cafés						
-- Chained Cafés						
-- Independent Cafés						
- Juice/Smoothie Bars						
-- Chained Juice/Smoothie Bars						
-- Independent Juice/Smoothie Bars						
- Specialist Coffee and Tea Shops						
-- Chained Specialist Coffee and Tea Shops						
-- Independent Specialist Coffee and Tea Shops						
- Chained Cafés/Bars						
- Independent Cafés/Bars						
Cafés/Bars						

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 10 Forecast Sales in Cafés/Bars by Category: Number of Transactions 2023-2028

'000 transactions	2023	2024	2025	2026	2027	2028
- Bars/Pubs	Data removed from sample					

- Chained Bars/Pubs
- Independent Bars/Pubs
- Cafés
- Chained Cafés
- Independent Cafés
- Juice/Smoothie Bars
- Chained Juice/Smoothie Bars
- Independent Juice/Smoothie Bars
- Specialist Coffee and Tea Shops
- Chained Specialist Coffee and Tea Shops
- Independent Specialist Coffee and Tea Shops
- Chained Cafés/Bars
- Independent Cafés/Bars
- Cafés/Bars

Data removed from sample

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 11 Forecast Sales in Cafés/Bars by Category: Foodservice Value 2023-2028

EUR million

2023 2024 2025 2026 2027 2028

- Bars/Pubs
- Chained Bars/Pubs
- Independent Bars/Pubs
- Cafés
- Chained Cafés
- Independent Cafés
- Juice/Smoothie Bars
- Chained Juice/Smoothie Bars
- Independent Juice/Smoothie Bars
- Specialist Coffee and Tea Shops
- Chained Specialist Coffee and Tea Shops
- Independent Specialist Coffee and Tea Shops
- Chained Cafés/Bars
- Independent Cafés/Bars
- Cafés/Bars

Data removed from sample

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 12 Forecast Cafés/Bars by Category: % Units/Outlets Growth 2023-2028

% Units/Outlets growth

2023/2024 2023-28 CAGR 2023/28 Total

- Bars/Pubs
- Chained Bars/Pubs
- Independent Bars/Pubs
- Cafés
- Chained Cafés
- Independent Cafés
- Juice/Smoothie Bars
- Chained Juice/Smoothie Bars
- Independent Juice/Smoothie Bars
- Specialist Coffee and Tea Shops
- Chained Specialist Coffee and Tea Shops
- Independent Specialist Coffee and Tea Shops
- Chained Cafés/Bars
- Independent Cafés/Bars
- Cafés/Bars

Data removed from sample

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 13 Forecast Sales in Cafés/Bars by Category: % Transaction Growth 2023-2028

% transaction growth

2023/2024 2023-28 CAGR 2023/28 Total

- Bars/Pubs
- Chained Bars/Pubs
- Independent Bars/Pubs
- Cafés
- Chained Cafés
- Independent Cafés
- Juice/Smoothie Bars
- Chained Juice/Smoothie Bars
- Independent Juice/Smoothie Bars
- Specialist Coffee and Tea Shops
- Chained Specialist Coffee and Tea Shops
- Independent Specialist Coffee and Tea Shops
- Chained Cafés/Bars
- Independent Cafés/Bars
- Cafés/Bars

Data removed from sample

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 14 Forecast Sales in Cafés/Bars by Category: % Foodservice Value Growth 2023-2028

% value growth

2023/2024 2023-28 CAGR 2023/28 Total

- Bars/Pubs
- Chained Bars/Pubs
- Independent Bars/Pubs
- Cafés
- Chained Cafés
- Independent Cafés
- Juice/Smoothie Bars
- Chained Juice/Smoothie Bars
- Independent Juice/Smoothie Bars
- Specialist Coffee and Tea Shops

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- Chained Specialist Coffee and Tea Shops
 - Independent Specialist Coffee and Tea Shops
 - Chained Cafés/Bars
 - Independent Cafés/Bars
- Cafés/Bars

Data removed from sample

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

CONSUMER FOODSERVICE IN SLOVAKIA - INDUSTRY OVERVIEW

EXECUTIVE SUMMARY

Consumer foodservice in 2023: The big picture

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2023 key trends

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Competitive landscape

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Independent foodservice developments

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What next for consumer foodservice?

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MARKET DATA

Table 15 Units, Transactions and Value Sales in Consumer Foodservice 2018-2023

	2018	2019	2020	2021	2022	2023
Units	Data removed from sample					
Transactions (mn)						
EUR million current prices						
EUR million constant prices						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 16 Units, Transactions and Value Sales in Consumer Foodservice: % Growth
2018-2023

% growth	2022/23	2018-23 CAGR	2018/23 Total
Units	Data removed from sample		
Transactions			
Value current prices			
Value constant prices			

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 17 Consumer Foodservice by Independent vs Chained by Type: Units/Outlets 2023

outlets	Independent	Chained	Total
Cafés/Bars	Data removed from sample		
Full-Service Restaurants			
Limited-Service Restaurants			
Self-Service Cafeterias			
Street Stalls/Kiosks			
Consumer Foodservice by Type			

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 18 Consumer Foodservice by Independent vs Chained: % Foodservice Value
2018-2023

% value	2018	2019	2020	2021	2022	2023
Chained Foodservice	Data removed from sample					
Independent Foodservice						
Total						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 19 Sales in Consumer Foodservice by Food vs Drink Split: % Foodservice Value
2018-2023

% value	2018	2019	2020	2021	2022	2023
Food	Data removed from sample					
Drink						
Total						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 20 Sales in Consumer Foodservice by Food vs Drink Split by Type: % Foodservice Value 2023

% value analysis

	Food	Drink	Total
Cafés/Bars	Data removed from sample		
Full-Service Restaurants			
Limited-Service Restaurants			
Self-Service Cafeterias			
Street Stalls/Kiosks			
Consumer Foodservice by Type			

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 21 Sales in Consumer Foodservice by Location: % Foodservice Value 2018-2023

% value	2018	2019	2020	2021	2022	2023
Stand-Alone	Data removed from sample					
Retail						
Travel						
Leisure						
Lodging						
Total						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 22 GBO Company Shares in Chained Consumer Foodservice: % Foodservice Value 2019-2023

% value Company	2019	2020	2021	2022	2023
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Data removed from sample

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 23 GBN Brand Shares in Chained Consumer Foodservice: % Foodservice Value 2020-2023

% value Brand	Global Brand Owner	2020	2021	2022	2023
Data removed from sample					

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 24 GBN Brand Shares in Chained Consumer Foodservice: Units/Outlets 2023

Brand	Global Brand Owner	outlets
Data removed from sample		

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 25 Forecast Units, Transactions and Value Sales in Consumer Foodservice 2023-2028

	2023	2024	2025	2026	2027	2028
Units	Data removed from sample					
Transactions (mn)						
EUR million						

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 26 Forecast Units, Transactions and Value Sales in Consumer Foodservice: % Growth 2023-2028

% growth

2023/24 2023-28 CAGR 2023/28 Total

Units
Transactions
Constant value

Data removed from sample

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

DISCLAIMER

Forecast closing date: 5 February 2024
Report closing date: 14 February 2024
Analysis and data in this report give full consideration to consumer behaviour and market performance in 2023 and beyond as of the dates above. For the very latest insight on this industry and consumer behaviour, at both global and national level, readers can access strategic analysis and updates on www.euromonitor.com and via the Passport system, where new content is being added on a systematic basis.

SOURCES

Sources used during the research included the following:

Summary 1 Research Sources

Official Sources

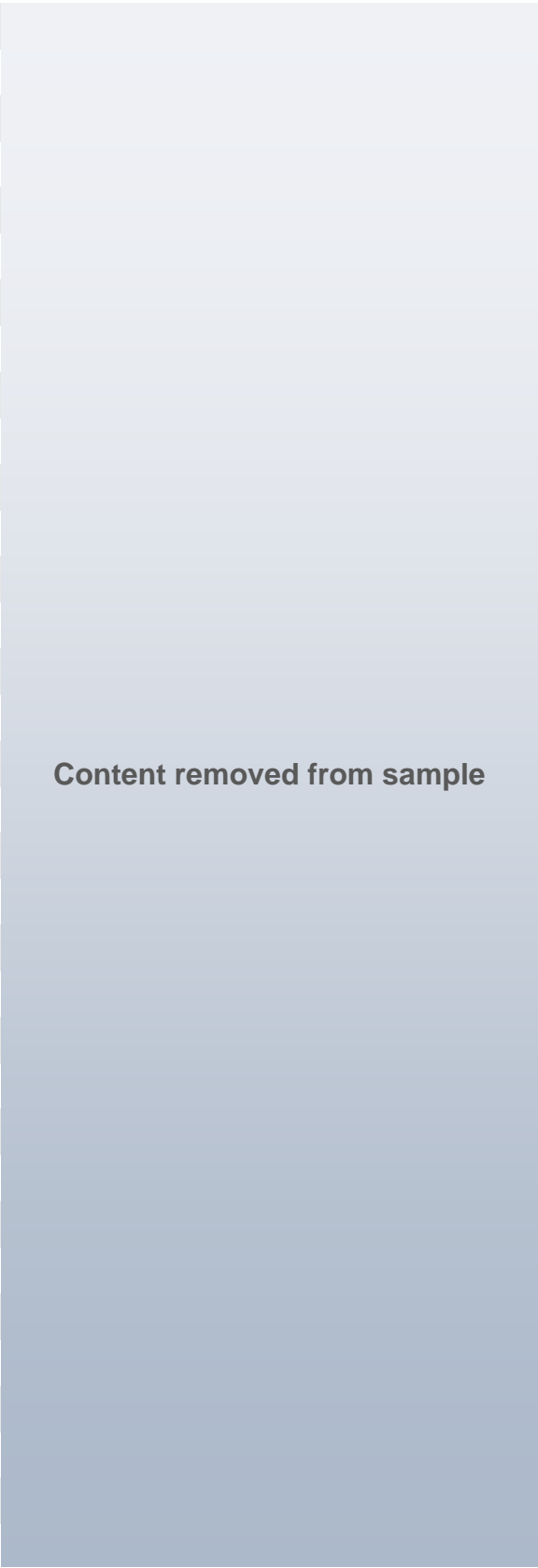
Trade Associations

Trade Press

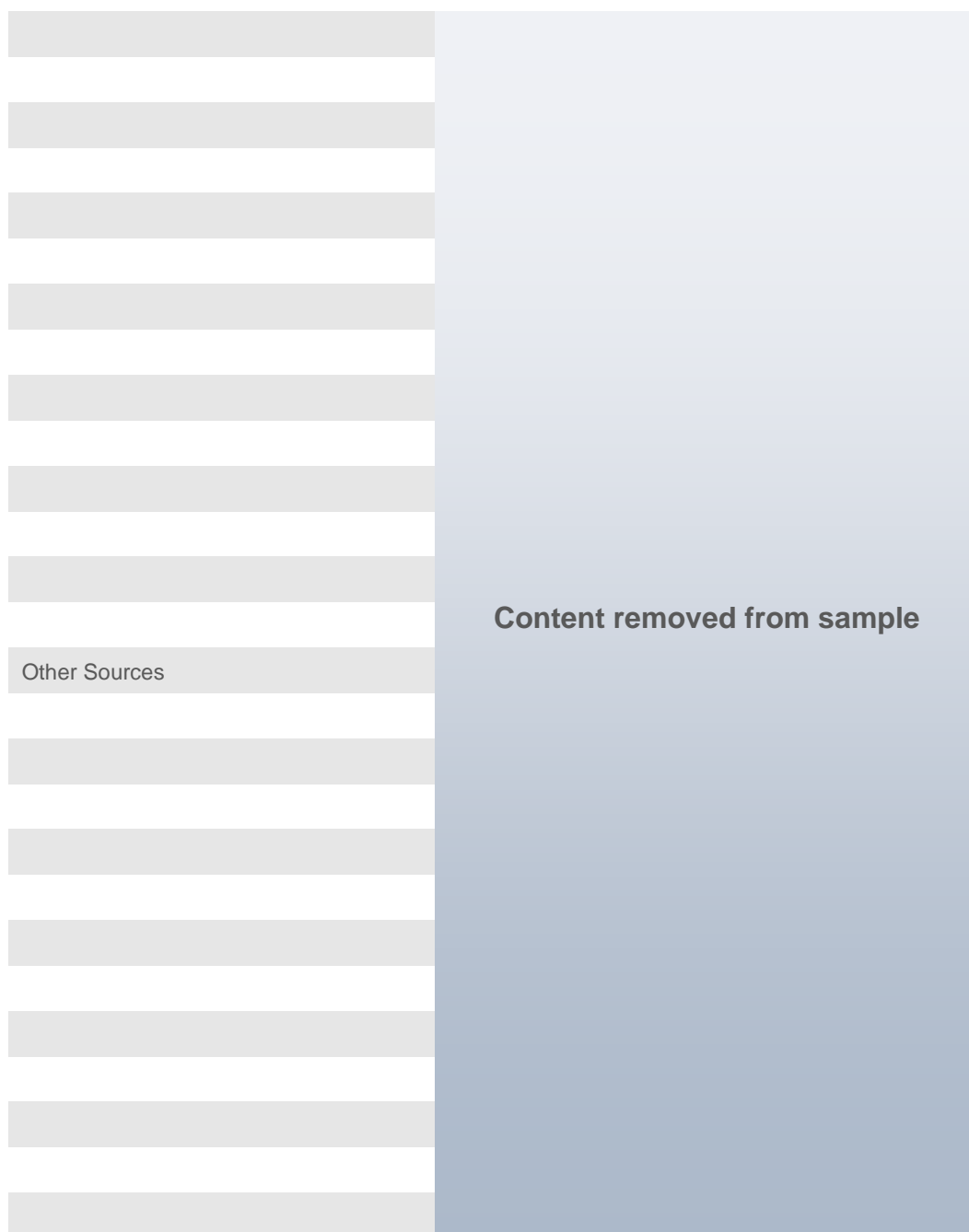
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Company Sources

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Source: Euromonitor International