Euromonitor International

Consumer Foodservice By Location in the United Kingdom

March 2026

Consumer Foodservice By Location in the United Kingdom - Category analysis

KEY DATA FINDINGS

2025 DEVELOPMENTS

High-footfall sites concentrate growth across travel, retail and high street locations

INDUSTRY PERFORMANCE

Travel and retail locations benefit from high-throughput foodservice formats

Standalone outlets see further growth in 2025

Fulfilment and value considerations shape performance across locations

WHAT'S NEXT?

Travel to remain most dynamic non-standalone location over forecast period

Standalone locations to remain resilient drivers of foodservice value growth

Structural pressures reshape opportunities across consumer foodservice locations

Demographic shifts to increasingly shape consumer foodservice performance by location

COMPETITIVE LANDSCAPE

Travel locations remain dominated by high-footfall, brand-led operators

Retail locations prioritise convenience, mixed-use formats and experiential offerings

CATEGORY DATA

Table 1 - Consumer Foodservice by Location: Units/Outlets 2020-2025

Table 2 - Sales in Consumer Foodservice by Location: Number of Transactions 2020-2025

Table 3 - Sales in Consumer Foodservice by Location: Foodservice Value 2020-2025

Table 4 - Consumer Foodservice by Location: % Units/Outlets Growth 2020-2025

Table 5 - Sales in Consumer Foodservice by Location: % Transaction Growth 2020-2025

Table 6 - Sales in Consumer Foodservice by Location: % Foodservice Value Growth 2020-2025

Table 7 - Consumer Foodservice Through Standalone: Units/Outlets 2020-2025

Table 8 - Sales in Consumer Foodservice Through Standalone: Number of Transactions 2020-2025

Table 9 - Sales in Consumer Foodservice Through Standalone: Foodservice Value 2020-2025

Table 10 - Consumer Foodservice Through Standalone: % Units/Outlets Growth 2020-2025

Table 11 - Sales in Consumer Foodservice Through Standalone: % Transaction Growth 2020-2025

Table 12 - Sales in Consumer Foodservice Through Standalone: % Foodservice Value Growth 2020-2025

Table 13 - Consumer Foodservice Through Leisure: Units/Outlets 2020-2025

Table 14 - Sales in Consumer Foodservice Through Leisure: Number of Transactions 2020-2025

Table 15 - Sales in Consumer Foodservice Through Leisure: Foodservice Value 2020-2025

Table 16 - Consumer Foodservice Through Leisure: % Units/Outlets Growth 2020-2025

Table 17 - Sales in Consumer Foodservice Through Leisure: % Transaction Growth 2020-2025

Table 18 - Sales in Consumer Foodservice Through Leisure: % Foodservice Value Growth 2020-2025

Table 19 - Consumer Foodservice Through Retail: Units/Outlets 2020-2025

Table 20 - Sales in Consumer Foodservice Through Retail: Number of Transactions 2020-2025

Table 21 - Sales in Consumer Foodservice Through Retail: Foodservice Value 2020-2025

Table 22 - Consumer Foodservice Through Retail: % Units/Outlets Growth 2020-2025

Table 23 - Sales in Consumer Foodservice Through Retail: % Transaction Growth 2020-2025

Table 24 - Sales in Consumer Foodservice Through Retail: % Foodservice Value Growth 2020-2025

Table 25 - Consumer Foodservice Through Lodging: Units/Outlets 2020-2025

Table 26 - Sales in Consumer Foodservice Through Lodging: Number of Transactions 2020-2025

Table 27 - Sales in Consumer Foodservice Through Lodging: Foodservice Value 2020-2025

Table 28 - Consumer Foodservice Through Lodging: % Units/Outlets Growth 2020-2025

Table 29 - Sales in Consumer Foodservice Through Lodging: % Transaction Growth 2020-2025

Table 30 - Sales in Consumer Foodservice Through Lodging: % Foodservice Value Growth 2020-2025

Table 31 - Consumer Foodservice Through Travel: Units/Outlets 2020-2025

Table 32 - Sales in Consumer Foodservice Through Travel: Number of Transactions 2020-2025
Table 33 - Sales in Consumer Foodservice Through Travel: Foodservice Value 2020-2025
Table 34 - Consumer Foodservice Through Travel: % Units/Outlets Growth 2020-2025
Table 35 - Sales in Consumer Foodservice Through Travel: % Transaction Growth 2020-2025
Table 36 - Sales in Consumer Foodservice Through Travel: % Foodservice Value Growth 2020-2025
Table 37 - Forecast Consumer Foodservice by Location: Units/Outlets 2025-2030
Table 38 - Forecast Sales in Consumer Foodservice by Location: Number of Transactions 2025-2030
Table 39 - Forecast Sales in Consumer Foodservice by Location: Foodservice Value 2025-2030
Table 40 - Forecast Consumer Foodservice by Location: % Units/Outlets Growth 2025-2030
Table 41 - Forecast Sales in Consumer Foodservice by Location: % Transaction Growth 2025-2030
Table 42 - Forecast Sales in Consumer Foodservice by Location: % Foodservice Value Growth 2025-2030
Table 43 - Forecast Consumer Foodservice Through Standalone: Units/Outlets 2025-2030
Table 44 - Forecast Sales in Consumer Foodservice Through Standalone: Number of Transactions 2025-2030
Table 45 - Forecast Sales in Consumer Foodservice Through Standalone: Foodservice Value 2025-2030
Table 46 - Forecast Consumer Foodservice Through Standalone: % Units/Outlets Growth 2025-2030
Table 47 - Forecast Sales in Consumer Foodservice Through Standalone: % Transaction Growth 2025-2030
Table 48 - Forecast Sales in Consumer Foodservice Through Standalone: % Foodservice Value Growth 2025-2030
Table 49 - Forecast Consumer Foodservice Through Leisure: Units/Outlets 2025-2030
Table 50 - Forecast Sales in Consumer Foodservice Through Leisure: Number of Transactions 2025-2030
Table 51 - Forecast Sales in Consumer Foodservice Through Leisure: Foodservice Value 2025-2030
Table 52 - Forecast Consumer Foodservice Through Leisure: % Units/Outlets Growth 2025-2030
Table 53 - Forecast Sales in Consumer Foodservice Through Leisure: % Transaction Growth 2025-2030
Table 54 - Forecast Sales in Consumer Foodservice Through Leisure: % Foodservice Value Growth 2025-2030
Table 55 - Forecast Consumer Foodservice Through Retail: Units/Outlets 2025-2030
Table 56 - Forecast Sales in Consumer Foodservice Through Retail: Number of Transactions 2025-2030
Table 57 - Forecast Sales in Consumer Foodservice Through Retail: Foodservice Value 2025-2030
Table 58 - Forecast Consumer Foodservice Through Retail: % Units/Outlets Growth 2025-2030
Table 59 - Forecast Sales in Consumer Foodservice Through Retail: % Transaction Growth 2025-2030
Table 60 - Forecast Sales in Consumer Foodservice Through Retail: % Foodservice Value Growth 2025-2030
Table 61 - Forecast Consumer Foodservice Through Lodging: Units/Outlets 2025-2030
Table 62 - Forecast Sales in Consumer Foodservice Through Lodging: Number of Transactions 2025-2030
Table 63 - Forecast Sales in Consumer Foodservice Through Lodging: Foodservice Value 2025-2030
Table 64 - Forecast Consumer Foodservice Through Lodging: % Units/Outlets Growth 2025-2030
Table 65 - Forecast Sales in Consumer Foodservice Through Lodging: % Transaction Growth 2025-2030
Table 66 - Forecast Sales in Consumer Foodservice Through Lodging: % Foodservice Value Growth 2025-2030
Table 67 - Forecast Consumer Foodservice Through Travel: Units/Outlets 2025-2030
Table 68 - Forecast Sales in Consumer Foodservice Through Travel: Number of Transactions 2025-2030
Table 69 - Forecast Sales in Consumer Foodservice Through Travel: Foodservice Value 2025-2030
Table 70 - Forecast Consumer Foodservice Through Travel: % Units/Outlets Growth 2025-2030
Table 71 - Forecast Sales in Consumer Foodservice Through Travel: % Transaction Growth 2025-2030
Table 72 - Forecast Sales in Consumer Foodservice Through Travel: % Foodservice Value Growth 2025-2030

DISCLAIMER

Consumer Foodservice in the United Kingdom - Industry Overview

EXECUTIVE SUMMARY

Chains lead value growth through price rises and convenience offer

KEY DATA FINDINGS

INDUSTRY PERFORMANCE

Price-led growth underpins value expansion amid subdued volumes

Convenience-led occasions sustain everyday demand
Experiences and loyalty strengthen engagement in a pressured environment

WHAT'S NEXT?

Growth to remain resilient but increasingly selective
Innovation shifts towards formats, menus and operating models
Sustainability will become pragmatic and cost-driven

COMPETITIVE LANDSCAPE

Market leadership reflects scale, throughput and efficiency
Challenger brands deliver momentum through focused formats and cuisine-led appeal
Portfolio rationalisation and format repositioning reshape competition

CHANNELS

Chains consolidate value leadership as independents face pressure
Fulfilment strategies balance convenience and cost sensitivity

MARKET DATA

Table 73 - Units, Transactions and Value Sales in Consumer Foodservice 2020-2025
Table 74 - Units, Transactions and Value Sales in Consumer Foodservice: % Growth 2020-2025
Table 75 - Consumer Foodservice by Independent vs Chained by Type: Units/Outlets 2025
Table 76 - Consumer Foodservice by Independent vs Chained: % Foodservice Value 2020-2025
Table 77 - Sales in Consumer Foodservice by Food vs Drink Split: % Foodservice Value 2020-2025
Table 78 - Sales in Consumer Foodservice by Food vs Drink Split by Type: % Foodservice Value 2025
Table 79 - Sales in Consumer Foodservice by Location: % Foodservice Value 2020-2025
Table 80 - Sales in Consumer Foodservice by Fulfillment: % Foodservice Value 2020-2025
Table 81 - GBO Company Shares in Chained Consumer Foodservice: % Foodservice Value 2021-2025
Table 82 - GBN Brand Shares in Chained Consumer Foodservice: % Foodservice Value 2022-2025
Table 83 - GBN Brand Shares in Chained Consumer Foodservice: Units/Outlets 2025
Table 84 - Forecast Units, Transactions and Value Sales in Consumer Foodservice 2025-2030
Table 85 - Forecast Units, Transactions and Value Sales in Consumer Foodservice: % Growth 2025-2030

DISCLAIMER

SOURCES

Summary 1 - Research Sources

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-by-location-in-the-united-kingdom/report.