Euromonitor International

Consumer Foodservice in the United Kingdom

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Consumer Foodservice in the United Kingdom

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

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

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Chains extend lead as coffee-led routines offset pub weakness

INDUSTRY PERFORMANCE

Value growth in cafés/bars driven by chains despite ongoing outlet rationalisation

Specialist coffee and tea shops records strongest momentum
Cafés/bars adapt fulfilment to balance routine consumption with value

WHAT'S NEXT?

Cafés/bars set to deliver modest, chain-led growth amid continued outlet contraction
Fulfilment evolves towards faster, lower-cost and more flexible formats
Sustainability shifts from brand positioning to operational innovation

COMPETITIVE LANDSCAPE

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INDUSTRY PERFORMANCE

Fullservice restaurants maintain growth amid cost pressures
Dynamic growth led by experiential Middle Eastern and indulgent North American formats
Leading chains elevate consumer experiences through innovation

WHAT'S NEXT?

Higher spend per visit will drive future value growth
The evolution of fulfilment
Sustainability, technology and loyalty shape the future of fullservice dining

COMPETITIVE LANDSCAPE

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INDUSTRY PERFORMANCE

Scale and strategic investment drive chains ahead of independents
Latin American and Asian cuisines emerge as cuisine-led growth engines
Consumers balance convenience and cost through fulfilment choices

WHAT'S NEXT?

Chained operators and both emerging and established formats set to sustain growth
Operators will increasingly rebalance fulfilment channels to match distinct consumption occasions
Expansion through sustainability and tech innovation

COMPETITIVE LANDSCAPE

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INDUSTRY PERFORMANCE

Revenue growth persists despite fewer outlets and transactions
Chained selfservice cafeterias lead growth through efficiency and innovation
Health, personalisation and value sustain relevance in selfservice cafeterias

WHAT'S NEXT?

Priceled growth sustains selfservice cafeterias as independents decline
Evolution of fulfilment and value
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COMPETITIVE LANDSCAPE

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KEY DATA FINDINGS

2025 DEVELOPMENTS

Value-led convenience keeps street stalls and kiosks resilient

INDUSTRY PERFORMANCE

Further value growth for street stalls/kiosks in 2025
Independent street stalls and kiosks see fastest rises
Sustainability initiatives gain momentum

WHAT'S NEXT?

Price-driven value growth anticipated for forecast period
Puccino expands through alignment with current coffee trends
Sustainability commitments will remain key for street stalls and kiosks

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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

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