

United Kingdom Cafes & Bars - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts 2017 - 2029

Market Report | 2023-08-24 | 160 pages | Mordor Intelligence

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Report description:

The United Kingdom Cafes & Bars Market size is estimated at USD 32.53 billion in 2024, and is expected to reach USD 41.52 billion by 2029, growing at a CAGR of 5% during the forecast period (2024-2029).

Premium products and special offerings such as organic tea and coffee are gaining popularity in the country

- Cafes held the largest share by value in 2022 and are anticipated to remain the largest segment during the forecast period. This is mainly due to the increase in coffee consumption. In the United Kingdom, in 2021, consumers drank approximately 98 million cups of coffee daily, a 28 million increase from 2008. Among consumers who visit cafes, around 80% visit at least once a week, while 16% of consumers in the United Kingdom visit cafes daily. Cafes are increasingly popular among millennials for social gatherings. Hence, the cafe segment is anticipated to register a CAGR of 4.70% during the forecast period.

- Specialist coffee & tea shops are widely popular for premium products and specialized offerings, such as organic teas and coffees. However, most coffee & tea shops offer premium products, making them cater to a few sections of society. Bars and pubs have risen mainly due to more alcohol consumption. In 2021, around 79% of consumers consumed alcohol, and 49% consumed alcohol at least once a week, boosting the growth of bars and pubs during the forecast period.

- Juice/smoothie/dessert bars are anticipated to register the fastest growth, recording a CAGR of 5.44% by value during the forecast period. Due to the increase in the penetration of the juice/smoothie/dessert bars in the country, these stores offer a variety of sweet treats and desserts such as cakes, pastries, ice cream, and milkshakes and are popular among consumers looking for indulgent and satisfying snacks or desserts.

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United Kingdom Cafes & Bars Market Trends

Costa Coffee is the largest cafe chain in the United Kingdom, followed by Greggs and Starbucks

- The number of cafes and bars in the United Kingdom increased by around 4,100 from 2019 to 2022. This growth was due to the increasing number of franchisee establishments as companies expand their footprint as their key strategy in the United Kingdom. For instance, in 2022, there were 48,600 franchise units in the United Kingdom, a rise of 10% from 2015. Owing to this, cafes and bars are projected to register an average Y-o-Y growth rate of 2.06% during the forecast period (2023-2029), reaching more than 88,750 outlets by 2029.
- Cafes and bars accounted for the largest share of 47.8% in terms of the number of outlets in 2022 in the UK foodservice market. Standalone cafes and bars can be found in various settings, from urban neighborhoods to suburban strip malls and rural areas. They offer a range of coffees, including Latte, Cappuccino, Americano, Espresso, Hot Chocolate, and Ginger Shot, which are famous in the United Kingdom. However, Costa Coffee was the leading chain with more than 2,792 outlets, followed by Greggs with more than 2,176 outlets, and Starbucks with over 1,089 outlets in the country in 2022.
- The increased consumption of both alcoholic and non-alcoholic drinks in the country increased the number of orders to 98 orders per day in 2022, thus meeting the consumer demand and the increased number of orders. The chained outlets are expanding, and independent outlet operators are seeing it as a business opportunity. The average expenditure on alcoholic drinks reached over USD 34.2 billion in 2021. The demand for bars and pubs is also increasing, as 37% of British adults stated that they visited a pub once a fortnight for food and drinks in 2021.

Hot beverages and alcoholic drinks are becoming popular in UK cafes and bars

- There is increasing consumption of coffee, and cappuccinos and lattes are tied for the most popular coffee beverages in the United Kingdom, bringing more than 80% of people visiting coffee shops to visit at least once a week. On average, Brits spend USD 19.7 per month on coffee to drink at home. Sales through franchise units contribute around USD 18.44 billion to the UK economy.
- Total consumer spending on coffee, tea, and cocoa in the United Kingdom increased to around USD 4.4 billion in 2019. However, popular servings at cafes and bars include Latte, Cappuccino, Americano, and Espresso, which cost around USD 3.5 per 150 ml. Hot Chocolate Tea was priced at around USD 3.8 per 150 ml, Tea at USD 3.2 per 150 ml, Ginger Shot at around USD 3.4 per 200 ml, Wine at USD 7.2 per 141 ml, and Craft/Draught Beer at USD 6.5 per 551 ml in 2022. These all are consumed in high proportions in the United Kingdom.
- The sales value increased by 4.39% from 2019 to 2022 due to the rising inflation rate, which grew from 2017 to 2022 by an average of 2-3%, and the rising order volume, which reached more than 27,375 per outlet in 2022. In the United Kingdom, coffee drinkers typically have two cups per day, just as in 2022, when consumption was high.
- Due to the COVID-19 impact, from January 2020 to January 2021, the Y-o-Y cafe and bar menu prices in the United Kingdom steadily increased, reaching around USD 10.4 per order in 2020. The prices were slightly increased during COVID-19 due to the high cost of the food and the packaging; around 80% of the orders were takeaways or were delivered online.

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United Kingdom Cafes & Bars Industry Overview

The United Kingdom Cafes & Bars Market is fragmented, with the top five companies occupying 24.91%. The major players in this market are Costa Coffee, Marston's PLC, Mitchells & Butlers PLC, Stonegate Group and Whitbread PLC (sorted alphabetically).

Additional Benefits:

- The market estimate (ME) sheet in Excel format
- 3 months of analyst support

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