

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

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Report description:

The United Kingdom Foodservice Market size is estimated at USD 99.44 billion in 2024, and is expected to reach USD 134.5 billion by 2029, growing at a CAGR of 6.23% during the forecast period (2024-2029).

Rising coffee and tea consumption in the country especially in speciality tea/coffee is driving the market growth

- The quick service restaurants segment is expected to register a CAGR of 5.20% by value during the forecast period, owing to the standardization across food outlet chains in terms of ambiance, hygiene, service time, and ease of access. This is expected to raise consumer interest, thereby increasing overall footfall.
- However, cloud kitchens are anticipated to register the fastest growth at a CAGR of 31.84% during the forecast period, with booming online delivery preference by consumers, especially after the COVID-19 pandemic. The country experienced a growth in online delivery by 110% in 2021. Moreover, the affordability that cloud kitchens offer to manufacturers with less investment is boosting the growth of cloud kitchens in the United Kingdom.
- The market for full service restaurants registered a CAGR of 5.56% by value during the study period. European cuisine held the largest share of the market in 2022, with a 47.06% value stake. The growth of the segment can be attributed to the introduction of vegan, low-sugar, and gluten-free options to traditional European dishes by restaurants. FSR outlets have tried to make these dishes healthier and more appealing to the consumer due to a growing demand for nutritional diets in the United Kingdom.
- The growth of cafes & bars is supported by the rising consumption of tea and coffee in the country, especially in the specialty tea/coffee category. Around 70% of consumers in the United Kingdom drink at least two cups of coffee or more per day. Moreover, 23% of coffee drinkers regularly downed more than three cups of coffee per day, and 21% drank more than four cups per day in 2021. Hence, the cafes & bars segment in the United Kingdom is projected to register a CAGR of 4.87% by value during the

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forecast period.

United Kingdom Foodservice Market Trends

The UK QSR market grows moderately, with American chains gaining popularity

- The number of quick service restaurants in the United Kingdom registered a CAGR of 2.24% during the study period. The moderate growth rate can primarily be attributed to the operational restrictions posed by the pandemic. Among the world-renowned brands of the United Kingdom, Greggs PLC had the highest rating among the British public, with 67% positive opinion. Pizza Express, KFC, Pizza Hut, and Costa Coffee were also rated among the top five brands as of 2022. British citizens have exhibited a good appetite for fast food offered by American fast food chains like burgers, tacos, and pizzas, giving a good opening for American giants to expand. For instance, Wendy's, the third largest burger chain in the world, announced its plan to open 50 new restaurants during 2022-2023.
- Cafes and bars had the most outlets of all the foodservice types in 2022. In 2020, an average of 130 milliliters of hot beverages (coffee, tea, and hot chocolate) was consumed per person per week outside their home, giving ample opportunity for these outlets to grow. Currently, number of coffee shops in the country stands lower than the number of bars and pubs but projections are made to reverse the tally. Three new coffee shops are opening their doors in the United Kingdom every day, while the number of pubs is declining, supporting the projection claims. It was observed that the number of pubs and bars in London fell from 4,835 in 2001 to 3,615 in 2016, while coffee shops have more than doubled.
- Cloud kitchens are anticipated to register a CAGR of 14.79% during the forecast period. In 2022 and the segment represented 0.57% of the total number of foodservice outlets in the United Kingdom but they are expected to increase owing to increasing internet penetration during the forecast period.

Chicken and meat dishes' popularity in the United Kingdom drives menu expansion at QSR and FSR chains

- In the United Kingdom, the AOV was highest for the cloud kitchen, priced at 11.68% in 2022. The expansion of the cloud kitchen market is being driven by an increase in demand for online meal delivery. Britons spent an average of USD 636 on takeaway food delivery in 2022. Online meal ordering and delivery services grew in popularity after the pandemic. In 2022, popular dishes offered by cloud kitchens in the United Kingdom were pizza and chicken shish kebabs, priced at an average of USD 10.25 per 300 grams. In 2022, the cost of the most popular dishes was fixed at 50% of the average order value.
- The United Kingdom's food industry has evolved and changed to meet customer demands and consumer behavior. The number of takeaway and fast-food restaurants in the United Kingdom increased over the past decade. In 2022, the United Kingdom accounted for over 46.2 thousand takeaway and fast food restaurants. Due to the flavors and ingredients used in the products, burgers have been the most popular fast food among consumers. The vast availability of burgers and chicken wrap options or products with protein options, such as venison, beef, and several others, can be attributed to the growing demand for burgers and chicken wraps. In the United Kingdom, the average price of burgers and chicken wraps was USD 4.5 and USD 5.4, respectively, per serving in 2022.
- The popularity of chicken in recent years has led American restaurant chains in the United Kingdom to expand their menu

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selections. In the United Kingdom, the average amount of meat eaten per person is almost double the world average at 220 grams per day. Thus, owing to rising demand, many QSR and FSR restaurants included chicken dishes on menus, such as chicken biryani, chicken nuggets, and chicken wraps. The chicken biryani is priced at USD 12.5 per 500 grams in the country.

United Kingdom Foodservice Industry Overview

The United Kingdom Foodservice Market is fragmented, with the top five companies occupying 2.51%. The major players in this market are Greggs PLC, McDonald's Corporation, Nando's Group Holdings Limited, PizzaExpress (Restaurants) Limited and The Restaurant Group PLC (sorted alphabetically).

Additional Benefits:

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

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