

## **United Kingdom Quick Service Restaurant - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts 2017 - 2029**

Market Report | 2023-08-28 | 172 pages | Mordor Intelligence

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### **Report description:**

The United Kingdom Quick Service Restaurant Market size is estimated at USD 34.07 billion in 2024, and is expected to reach USD 44.01 billion by 2029, growing at a CAGR of 5.25% during the forecast period (2024-2029).

Consumers inclination towards fast food consumption led to an increasing number of fast food outlets in the country

- The overall sales for quick service restaurants increased by 35.1% in 2022 compared to 2017. The total number of QSR reached around 39,300 restaurants in 2022, which increased by more than 3000 restaurants since 2019. The number of orders per outlet in a day reached 151 in 2022, with an increase of around 10 orders per day from 2019. The United Kingdom was a big fast-food consumer, with around 22 million fast-food and takeaway meals weekly eaten by adults in 2022.
- By cuisine type, ice cream is projected to be the fastest-growing segment, with a CAGR of 6.30% during the forecast period. Owing to the increased consumption of ice cream in the country, it reached an average of 107 grams of ice cream products per person per week in 2021. Some popular ice cream outlets are Ginger's Comfort Emporium, Gelupo, Callestick Farm, Baskin Robbins, and Dunkin' Donuts.
- Burger accounted for the major share, with a hike of 39.91% in sales in 2021 compared to 2020. Owing to the increased consumption of burgers in the country, the average person in the United Kingdom consumed over one kilogram per year, or about 25 grams of burgers per week, in 2021, which increased from 19 grams per week in 2019.
- Meat-based cuisines, including Chicken Wings, Chicken Nuggets, and Chicken Lollipop, are also popular in the country, which observed an incline of 18.9% in sales value in 2022 compared to 2019, owing to the high meat consumption in the country. For instance, in the United Kingdom, poultry meat consumption per capita reached 32.7 kg in 2020. Moreover, the special recipe and tastes of popular fast-food chains like McDonald's, KFC, and Subway are preferred by consumers, affecting sales positively.

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## United Kingdom Quick Service Restaurant Market Trends

UK QSR market grows by 10% in 5 years, driven by franchise expansion and global brands

- The number of QSRs increased by around 10% from 2017 to 2022 in the United Kingdom, owing to the rising number of franchisee establishments and companies increasing their footprint. As of January 2023, there were around 1,382 outlets of McDonald's, 517 outlets of Burger King, and 1,005 outlets of KFC. Their global presence and marketing prowess have contributed to the growth of QSRs in the United Kingdom. These brands were able to successfully enter the UK market and capture a significant share of the QSR market by utilizing their brand familiarity and marketing power.
- By location, standalone restaurants acquired more than 72.35% of the value share in 2022. Standalone eateries can be found in a range of locations, including metropolitan districts, suburban strip malls, and rural regions. They typically offer a limited menu of quick and convenient meals, such as burgers, sandwiches, and salads, that can be prepared easily. Quick service restaurants can offer valuable and distinctive service to customers, providing a convenient and fast dining experience that is personalized and unique.
- While the UK takeaway industry expanded due to the increased demand for fast food during the pandemic and changing consumer preferences, QSRs struggled in 2020 due to closures, which proved attractive to chains trying to drive growth outside their local markets. In 2021, around 22% of Brits spent more on takeaways between June and July. At the same time, 80% of consumers ordered takeaways for home delivery, with 80% ordering through drive-throughs and in-person during the same period.

Brits' takeaway spending soars despite cost of living crisis, as rising inflation drives up average order value

- Brits have spent more money on takeaways and fast food than ever over the recent years, despite the cost of living crisis. The rise is particularly significant as it came on top of the boom in takeaways during the pandemic. In the QSR market, sales of pizza and chips increased by 7.7% in 2021 compared to the previous year. In the United Kingdom, takeaways amounted to an average of USD 725 per person annually in 2021, up 42% from USD 506 in 2019. However, the 12% "transaction growth" reported for the same period showed that takeout sales increased in volume and value terms. Chinese, Indian, chips, pizza, fried chicken, kebabs, burgers, and sushi are among the popular takeaways.
- Popular QSR dishes preferred by the Brits include burgers (costing USD 4.5 per 250 gm), French fries (USD 3 per 250 gm), onion rings (USD 3.4 per 250 gm), pizza (USD 8.5 per 300 gm), chicken nuggets (around USD 3.5 per 300 gm), and garlic bread (around USD 4.5 per 100 gm). The average order value in the QSR market increased by 10.02% from 2017 to 2022, owing to the inflation rate increasing by an average of 3-4% from 2017 to 2022 and the increased number of orders per year, which was more than 63,432 per outlet in 2022.
- The demand for menus with options such as vegetarian, gluten-free, and vegan is rising within the fast-food sector. Burger King introduced vegan chicken nuggets in the United Kingdom for the first time in January 2022. This was attributed to the increased preference for vegan food in the country. Around 40% of Brits preferred restaurants offering vegan food. Burger sales increased by 27.24% during 2019-2022, along with the increase in average orders for fast food.

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## United Kingdom Quick Service Restaurant Industry Overview

The United Kingdom Quick Service Restaurant Market is fragmented, with the top five companies occupying 9.36%. The major players in this market are Co-operative Group Limited, Domino's Pizza Group PLC, Greggs Plc, McDonald's Corporation and Samworth Brothers Limited (sorted alphabetically).

### Additional Benefits:

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

### Table of Contents:

#### 1 EXECUTIVE SUMMARY & KEY FINDINGS

#### 2 REPORT OFFERS

#### 3 INTRODUCTION

##### 3.1 Study Assumptions & Market Definition

##### 3.2 Scope of the Study

##### 3.3 Research Methodology

#### 4 KEY INDUSTRY TRENDS

##### 4.1 Number Of Outlets

##### 4.2 Average Order Value

##### 4.3 Regulatory Framework

##### 4.3.1 United Kingdom

##### 4.4 Menu Analysis

#### 5 MARKET SEGMENTATION (includes market size in Value in USD, Forecasts up to 2029 and analysis of growth prospects)

##### 5.1 Cuisine

##### 5.1.1 Bakeries

##### 5.1.2 Burger

##### 5.1.3 Ice Cream

##### 5.1.4 Meat-based Cuisines

##### 5.1.5 Pizza

##### 5.1.6 Other QSR Cuisines

##### 5.2 Outlet

##### 5.2.1 Chained Outlets

##### 5.2.2 Independent Outlets

##### 5.3 Location

##### 5.3.1 Leisure

##### 5.3.2 Lodging

##### 5.3.3 Retail

##### 5.3.4 Standalone

##### 5.3.5 Travel

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## 6 COMPETITIVE LANDSCAPE

### 6.1 Key Strategic Moves

### 6.2 Market Share Analysis

### 6.3 Company Landscape

6.4 Company Profiles (includes Global Level Overview, Market Level Overview, Core Business Segments, Financials, Headcount, Key Information, Market Rank, Market Share, Products and Services, and Analysis of Recent Developments).

#### 6.4.1 Ben & Jerry's Homemade Holdings Inc.

#### 6.4.2 Co-operative Group Limited

#### 6.4.3 Costa Coffee

#### 6.4.4 Deep Blue Restaurants Ltd

#### 6.4.5 Doctor's Associates, Inc.

#### 6.4.6 Domino's Pizza Group PLC

#### 6.4.7 Famous Brands Limited

#### 6.4.8 Favorite Fried Chicken Limited

#### 6.4.9 Five Guys Enterprises, LLC

#### 6.4.10 Greggs Plc

#### 6.4.11 Jab Holding Company S.A.R.L.

#### 6.4.12 McDonald's Corporation

#### 6.4.13 Samworth Brothers Limited

#### 6.4.14 Starbucks Corporation

## 7 KEY STRATEGIC QUESTIONS FOR FOODSERVICE CEOS

## 8 APPENDIX

### 8.1 Global Overview

#### 8.1.1 Overview

#### 8.1.2 Porter's Five Forces Framework

#### 8.1.3 Global Value Chain Analysis

#### 8.1.4 Market Dynamics (DROs)

### 8.2 Sources & References

### 8.3 List of Tables & Figures

### 8.4 Primary Insights

### 8.5 Data Pack

### 8.6 Glossary of Terms

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