

Highlights from the UK Food To Go Market Report 2022

Blonnie Whist

LUMINA INTELLIGENCE: FOOD TO GO IN 2022

What is the state of the FTG Market?



How has covid affected NPD within FTG?



What are the growth opportunities?

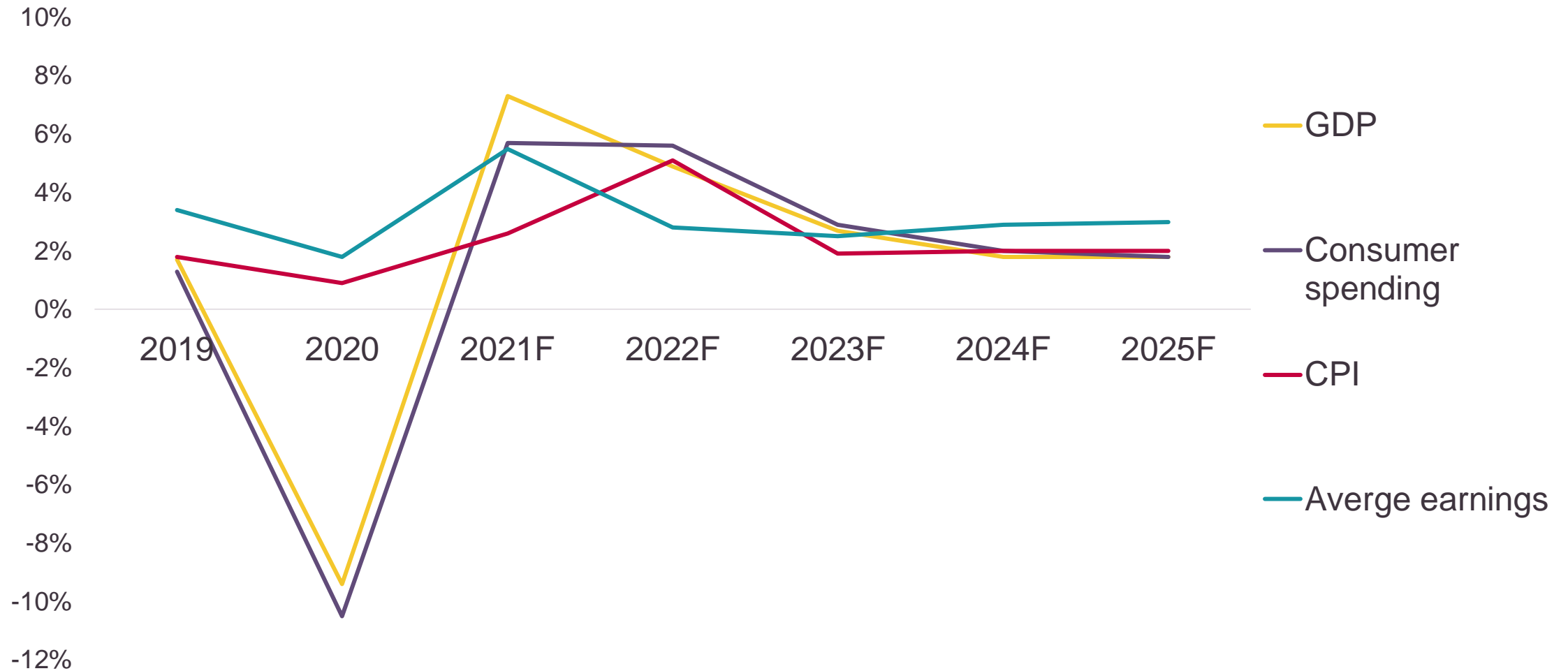


CONSUMER CONFIDENCE FALLS TO 13 MONTH LOW



Source: GfK Consumer Confidence, February 2022

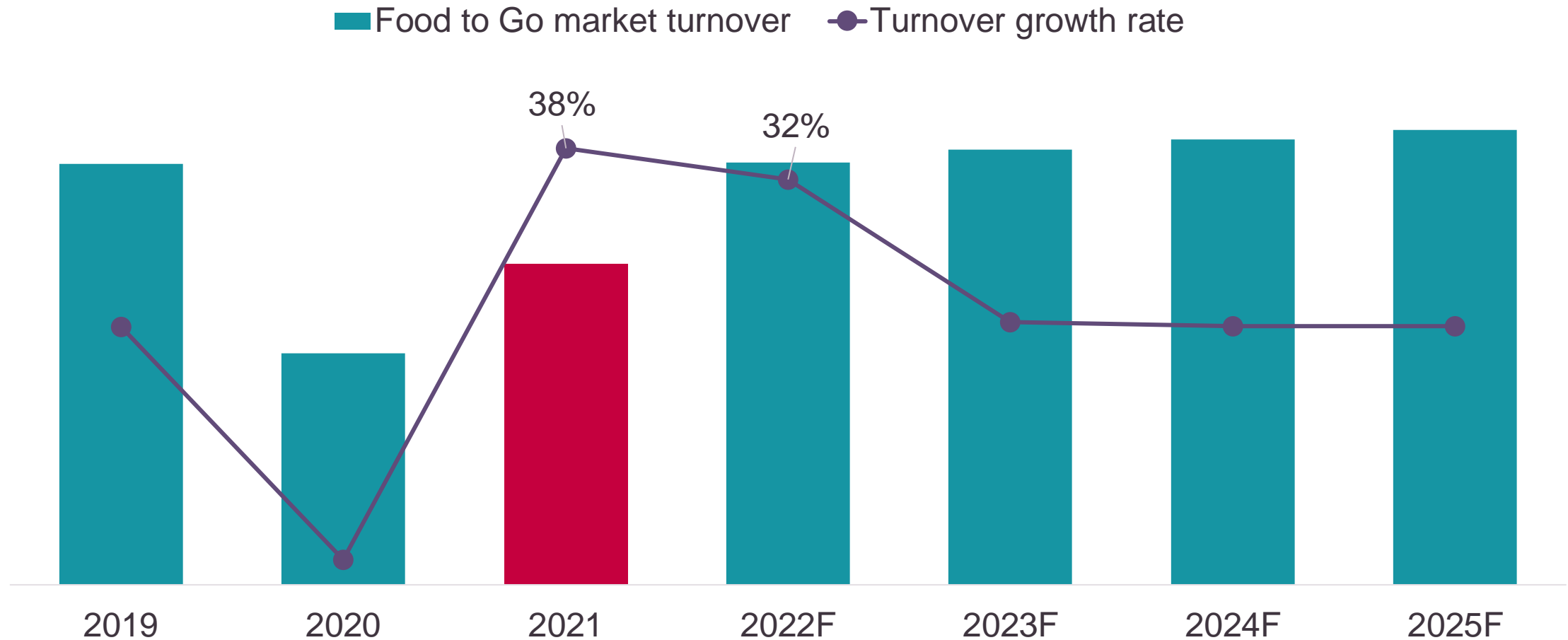
GDP IS FORECAST TO STABILISE AT 1.8% IN 2025



Source: EY Item Club, Winter Forecast, February 2022

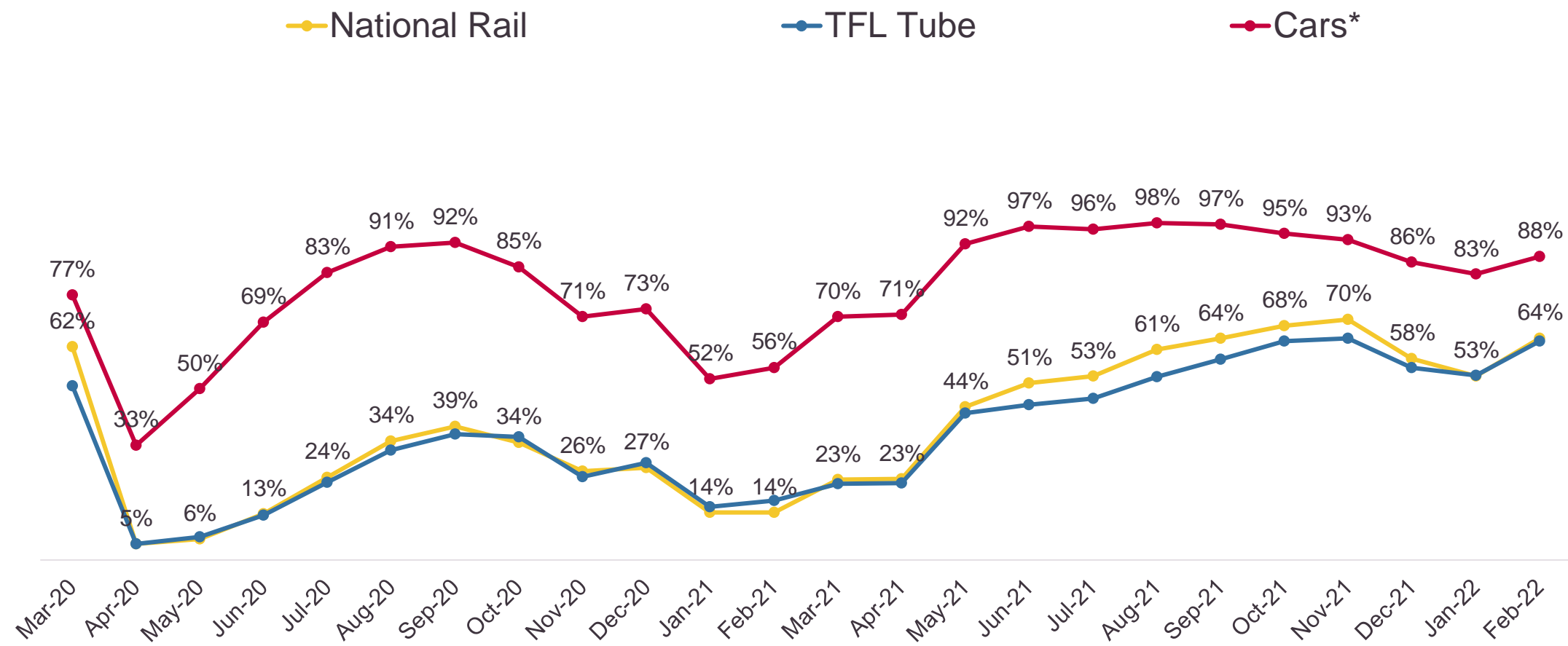
FOOD TO GO MARKET SET TO VALUE £23.0 BILLION IN 2025

UK Food to go market value, with percentage growth, 2019-2025F



Source: Lumina Intelligence, March 2022

FACTORS IMPACTING FOOD TO GO: TRAVEL

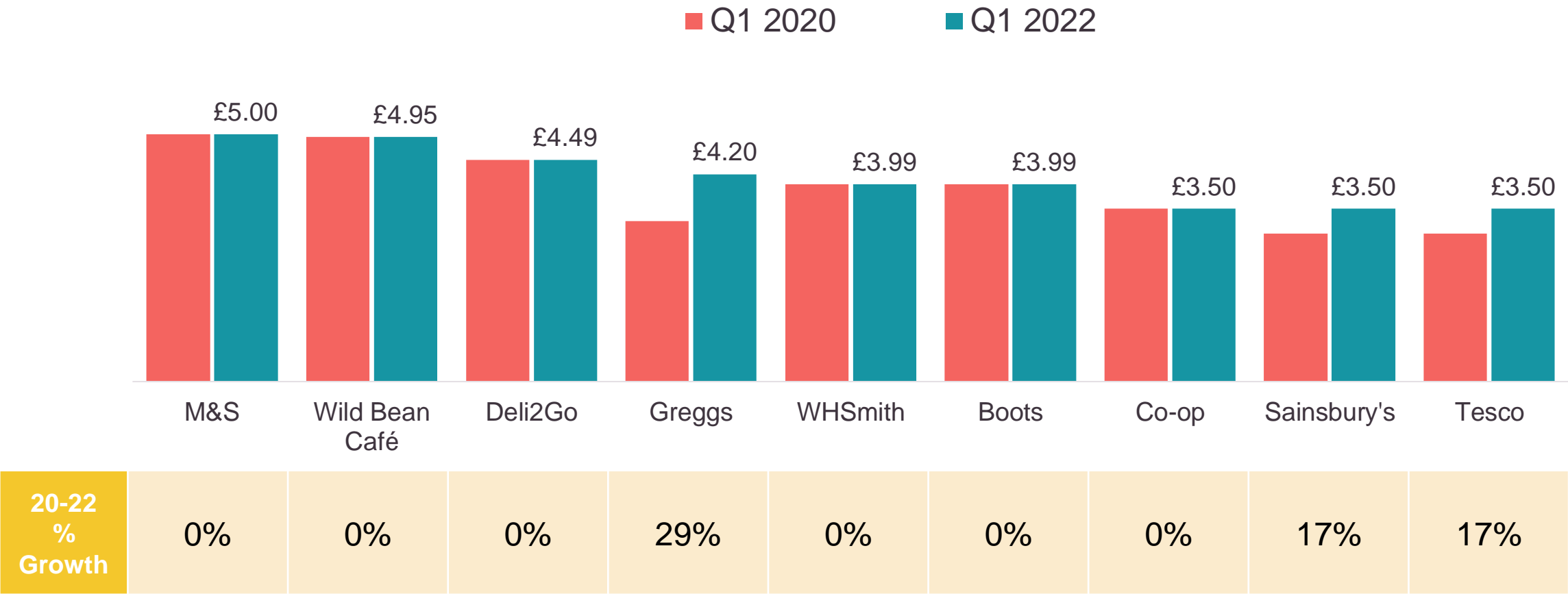


Source: Department For Travel Statistics, year-on-year comparisons with % of equivalent month in the previous year, use of transport, data to 21/02/2022

*Cars data compares February 2020 instead of year-on-year data

HABITUAL AND LOW TICKET NATURE

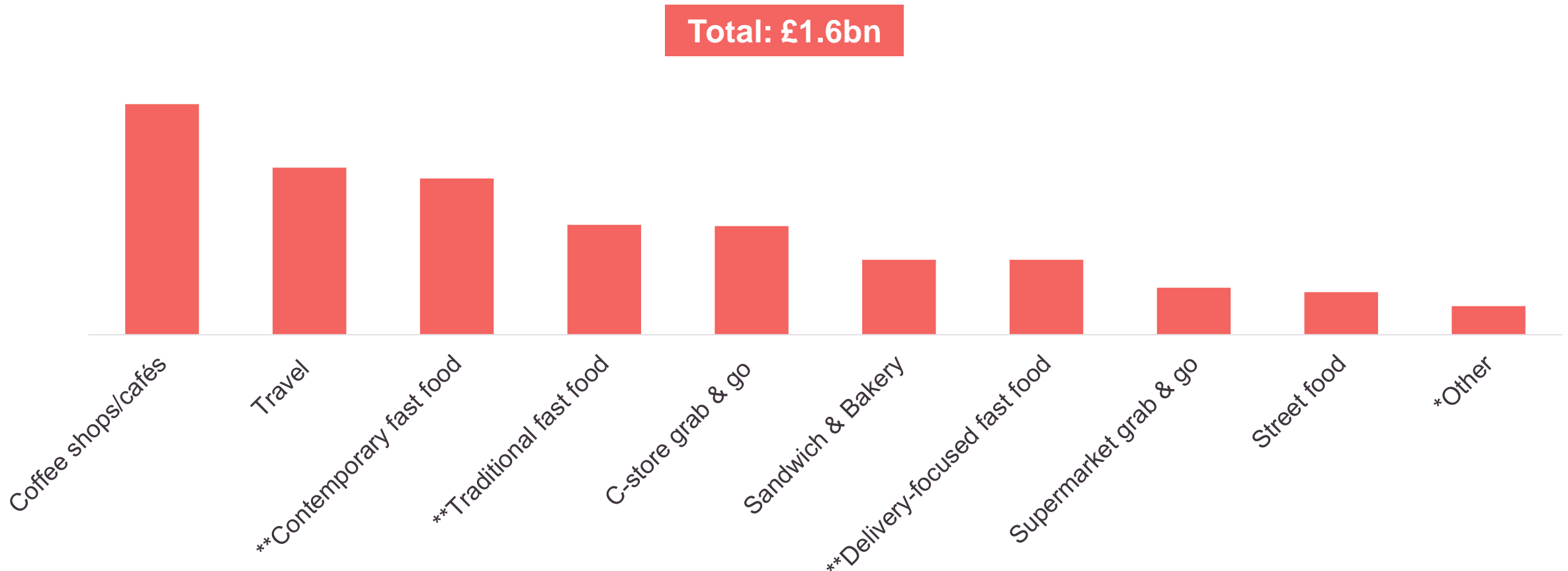
Meal Deal Prices from Top FTG Brands, Q1 2020 vs Q1 2022



Source: Lumina Intelligence, March 2022

SIZE OF THE PRIZE FOR TOP FTG CHANNELS, 2022F-2025F

Top 10 food to go channels ranked by absolute growth in £ millions, 2022F-2025F

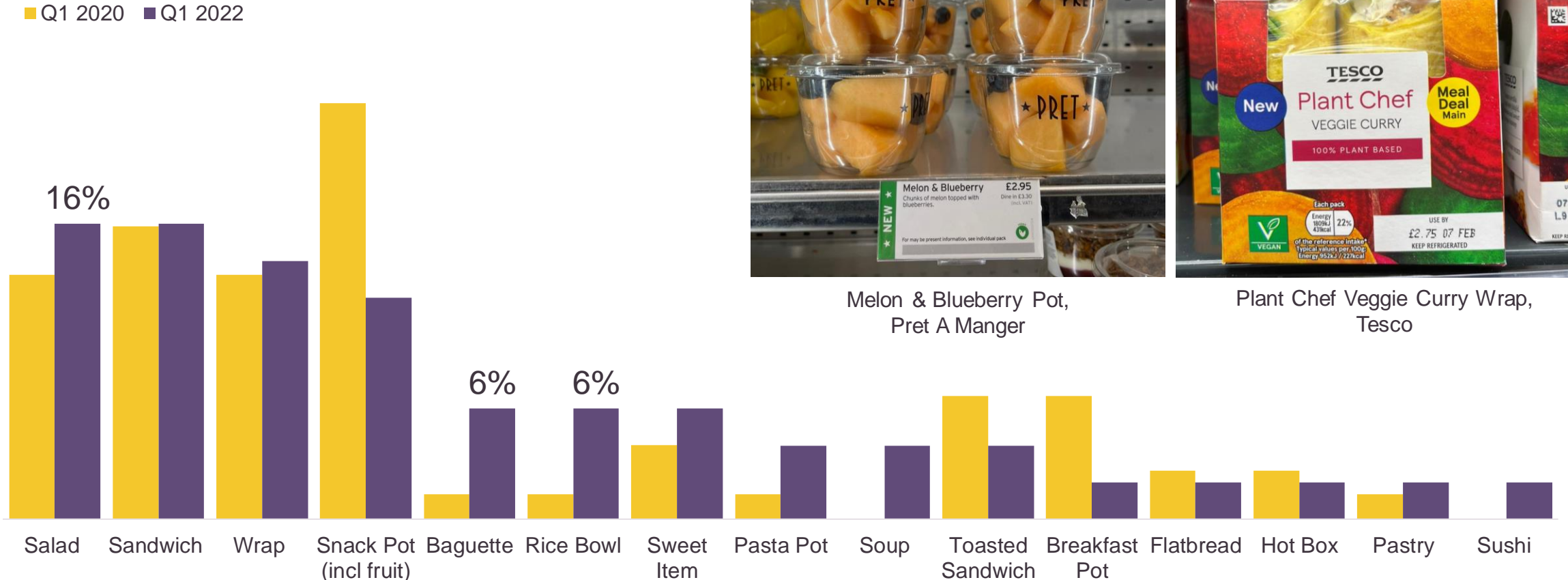


* 'Other FTG' includes FTG spend from pubs, hotels, leisure, supermarket/department store/Garden Centre cafés and contract catering. **Branded

Source: Lumina Intelligence, March 2022

ALMOST HALF OF NEW PRODUCTS ARE SALADS, SANDWICHES OR WRAPS

Share of New Products by Product Type, Q1 2022



Source: Lumina Intelligence, March 2022

PREMIUM PRODUCTS LEAD FOOD TO GO NPD

Share of New Products by Price, Q1 2022 vs Q1 2020



Vegan Xalmon Harmony Set, Wasabi, (£9.25)

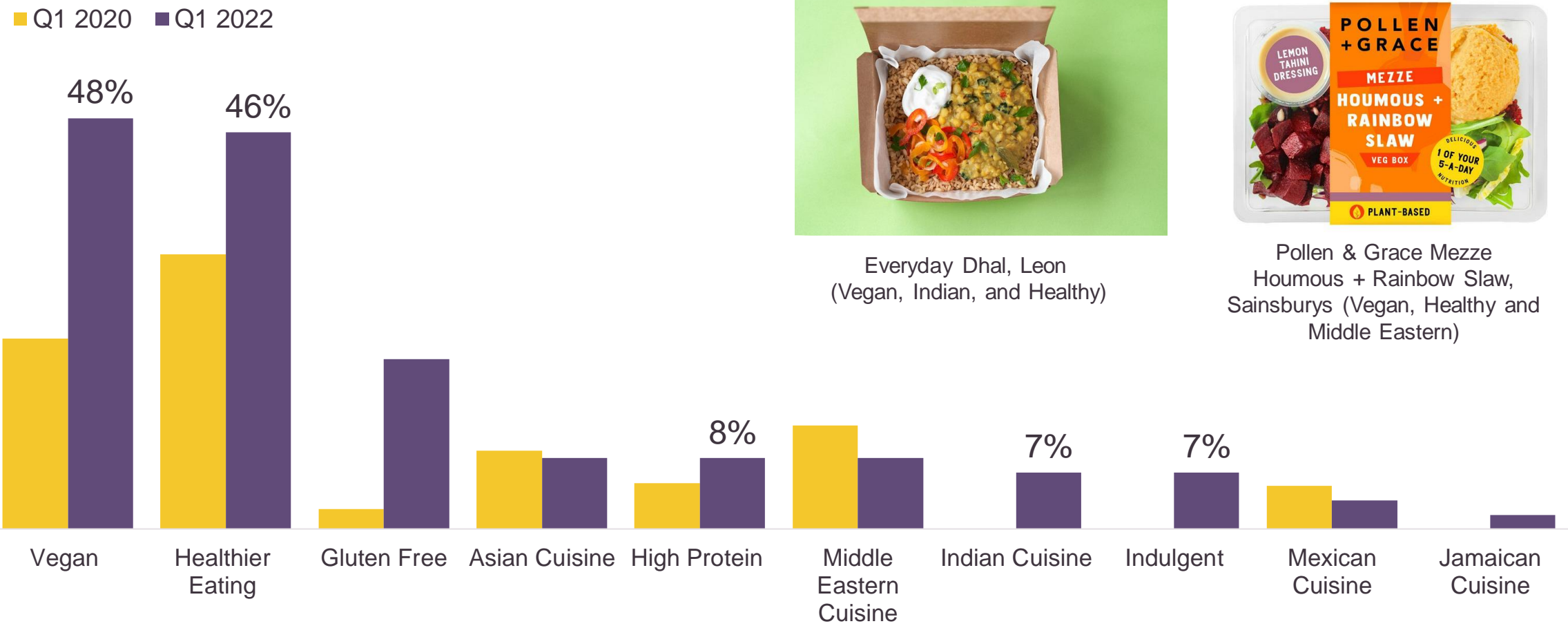


Meatless Meatball & Feta Hot Rice Bowl, Pret A Manger, (£6.25)

Source: Lumina Intelligence, March 2022

VEGAN AND HEALTHY TRENDS DOMINATE NEW PRODUCTS

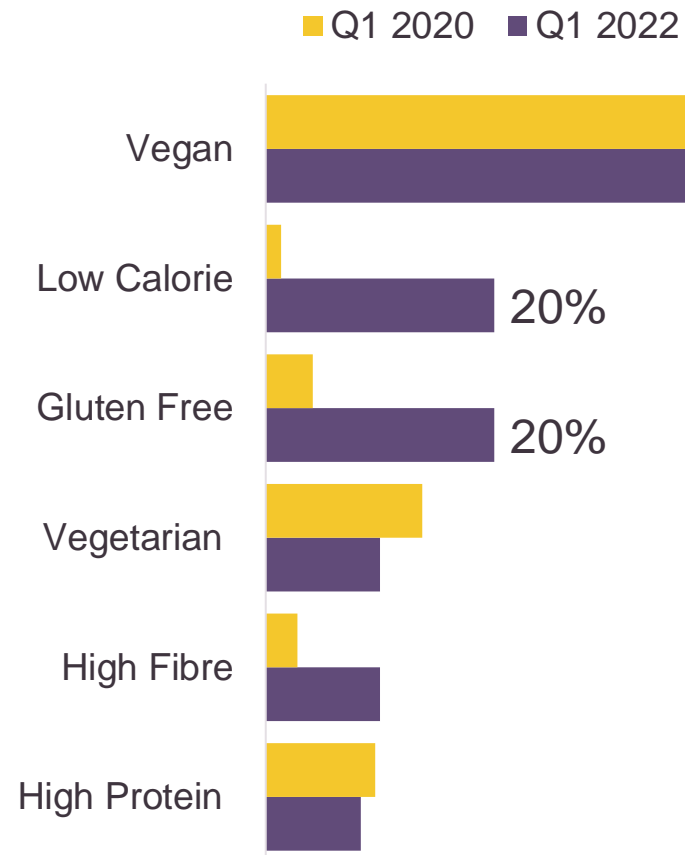
Incidence of New Products, by Trends, Q1 2022



Source: Lumina Intelligence, March 2022

ALMOST A FIFTH OF NEW PRODUCTS ARE LOW CALORIE OR GLUTEN FREE

Share of New Products, by Dietary Requirements, Q1 2022



Shapers Range Display,
Boots, Fleet Street, London



Chicken Tom Yum Noodle
Soup, Wasabi
(Low Calorie)

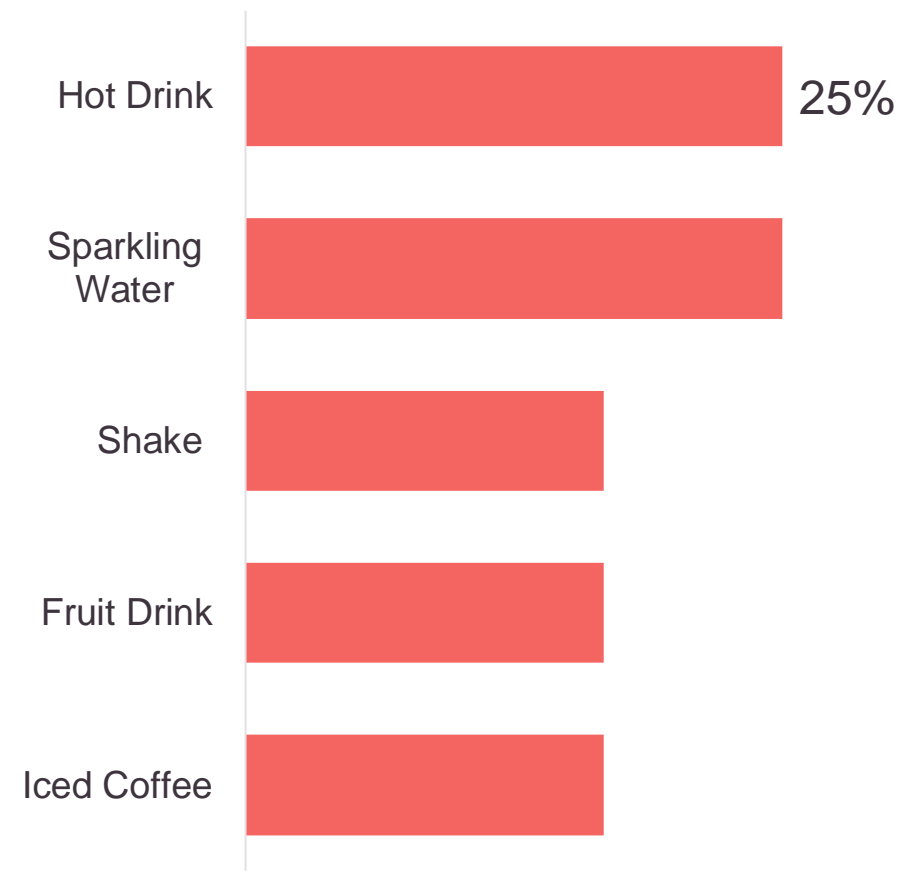


Vegan Burger, KFC

Source: Lumina Intelligence, March 2022

HALF OF BEVERAGE NPD IS HOT DRINKS AND SPARKLING WATERS

Share of New Drinks by Type, Q1 2022



Aero Mint Hot Chocolate, Costa (Hot Drink)



Sparkling Ice Black Raspberry, Sainsbury's, (Sparkling Water)



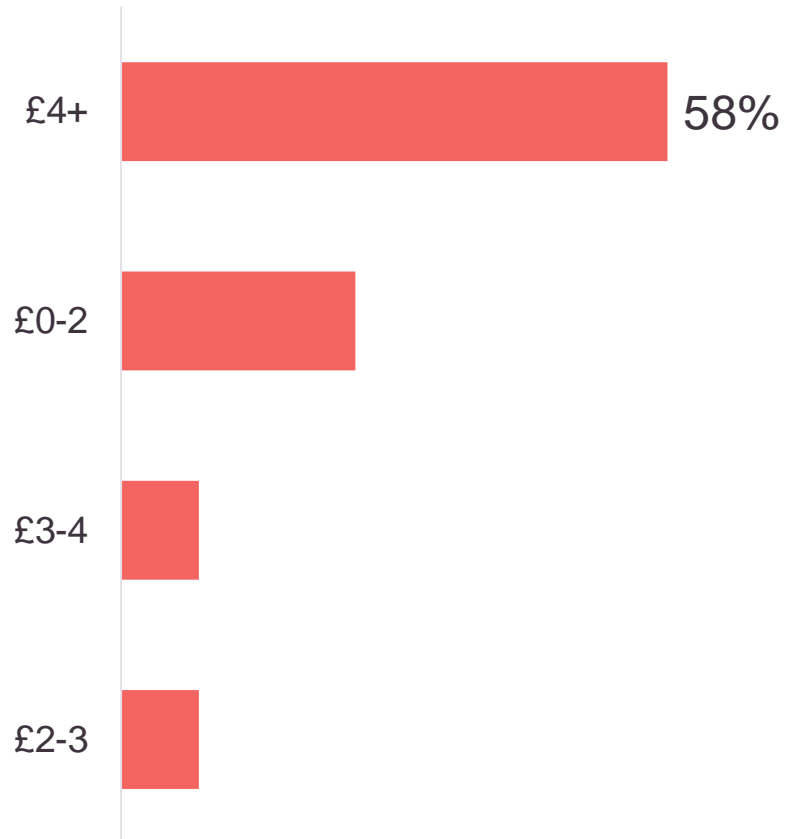
Cranberry Pret Still, Pret A Manger, (Fruit Drink)

Source: Lumina Intelligence, March 2022 `+



BEVERAGE NPD IS PREMIUM-LED

Share of New Drinks by Price, Q1 2022



Gut Up & Go Shake
Promotional Sign,
Crussh, Notting Hill, London

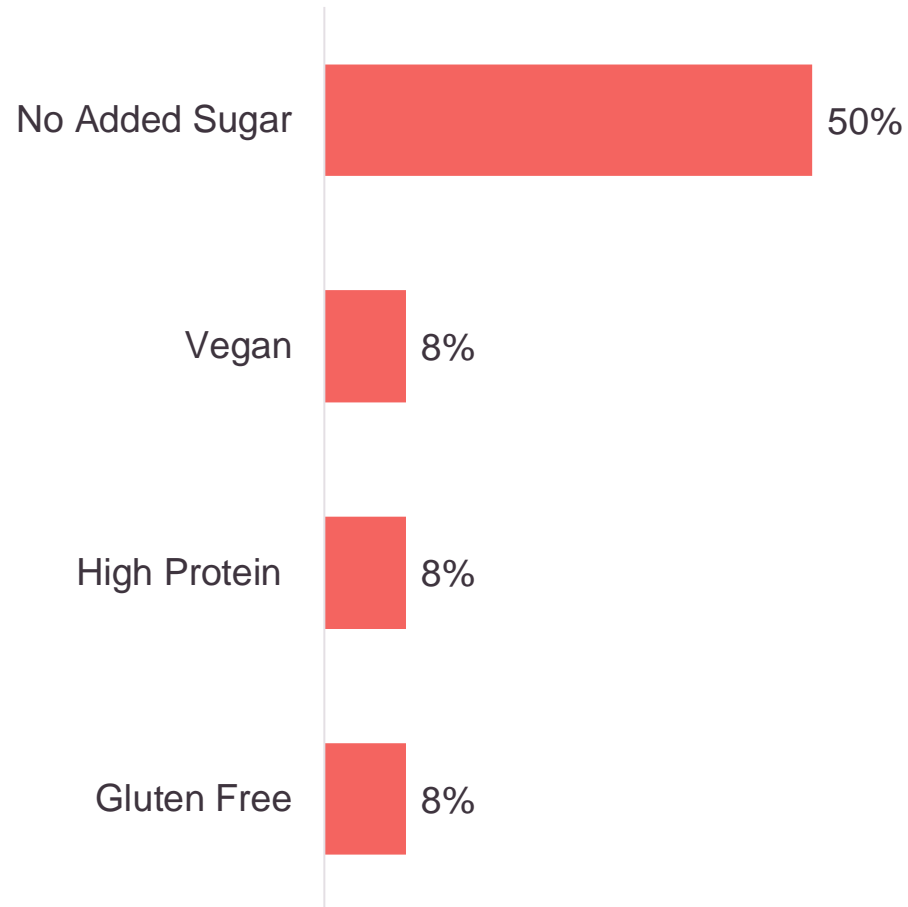


Berry Iced Cappuccino and Berry Hot Chocolate,
Starbucks,
(£4.20 each)

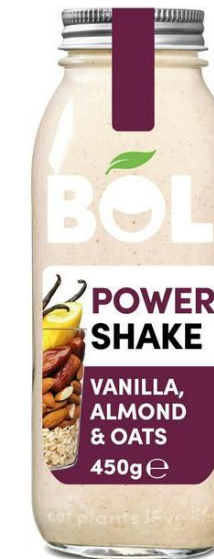
Source: Lumina Intelligence, March 2022

HEALTH CONSCIOUS TRENDS LEAD BEVERAGE NPD

Share of New Drinks by Dietary Requirement, Q1 2022



Roots & Fruits, Pret A Manger,
No Added Sugar



Bol Power Shake,
Sainsbury's,
No Added Sugar, High
Protein, and Gluten Free

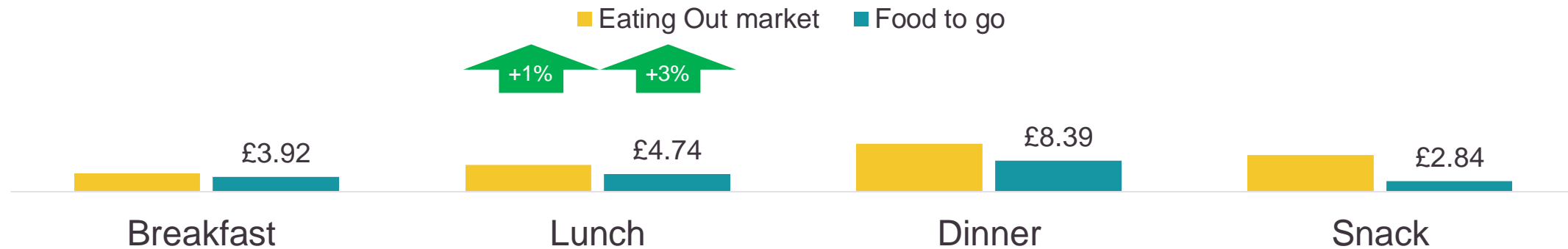


Cucumber & Mint Seltzer,
Pret A Manger, No Added
Sugar

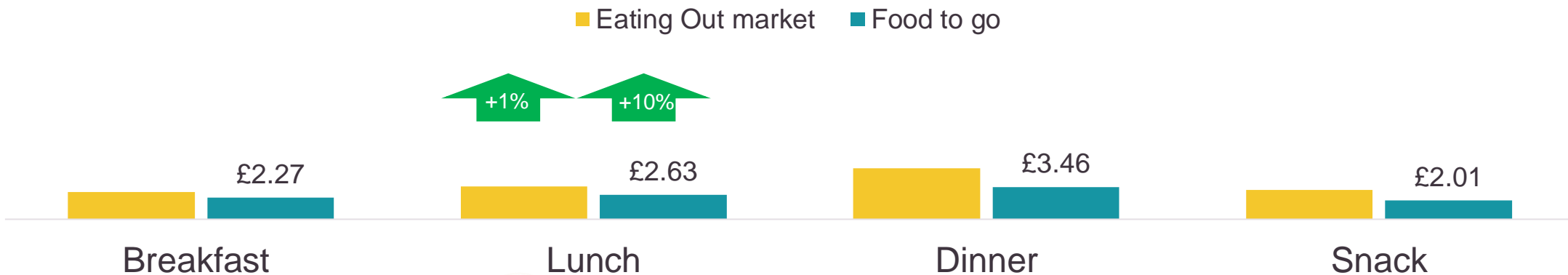
Source: Lumina Intelligence, March 2022

FOOD TO GO SPEND INCREASING AT LUNCH ON FOOD AND DRINK

Food: Average spend per occasion by day part, 12 WE 30.01.22 with % change vs previous 12 WE



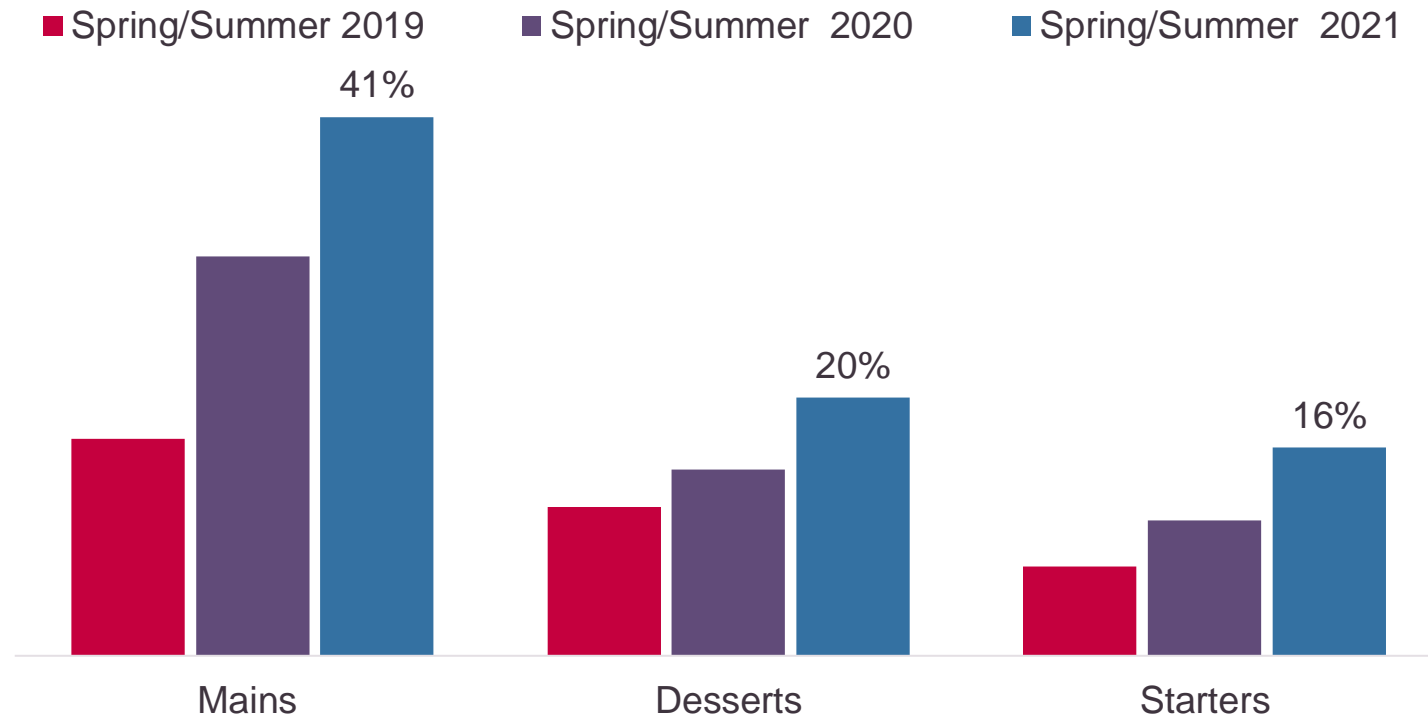
Drink



Source: Lumina Intelligence Eating & Drinking Out Panel, 12 WE 30.01.22

CUSTOMISATION PROVIDING CHOICE ON SMALLER MENUS

Proportion of dishes on menus that are advertised as customisable



Source: Lumina Intelligence Menu Tracker Tool, Spring/Summer 2019-2021

DIGITAL AND PARTNERSHIPS ARE DRIVING CONVENIENCE

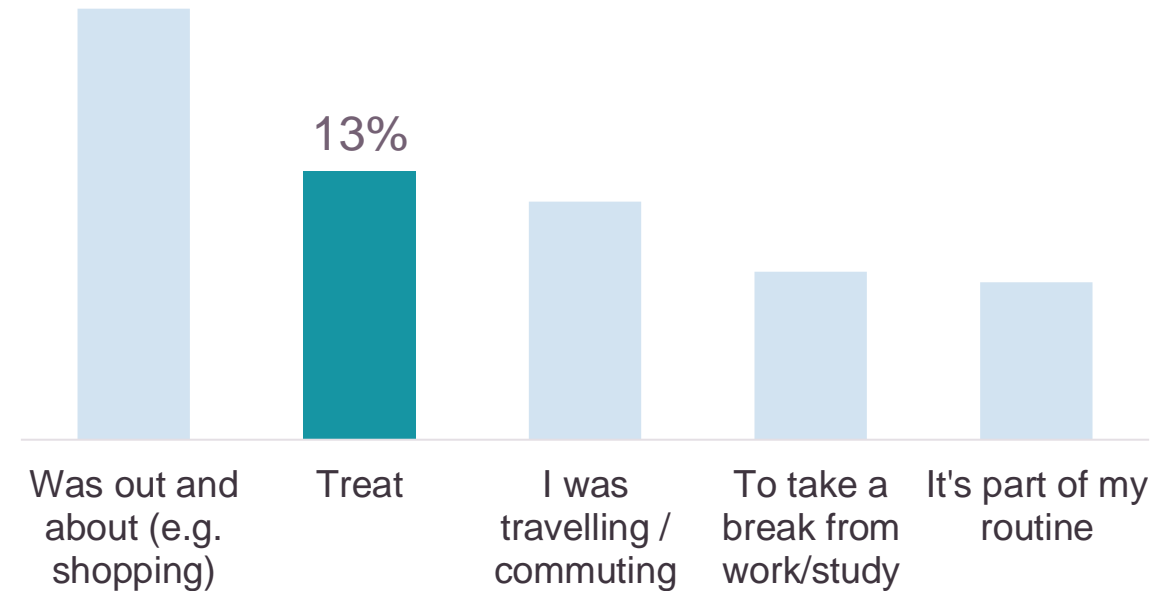
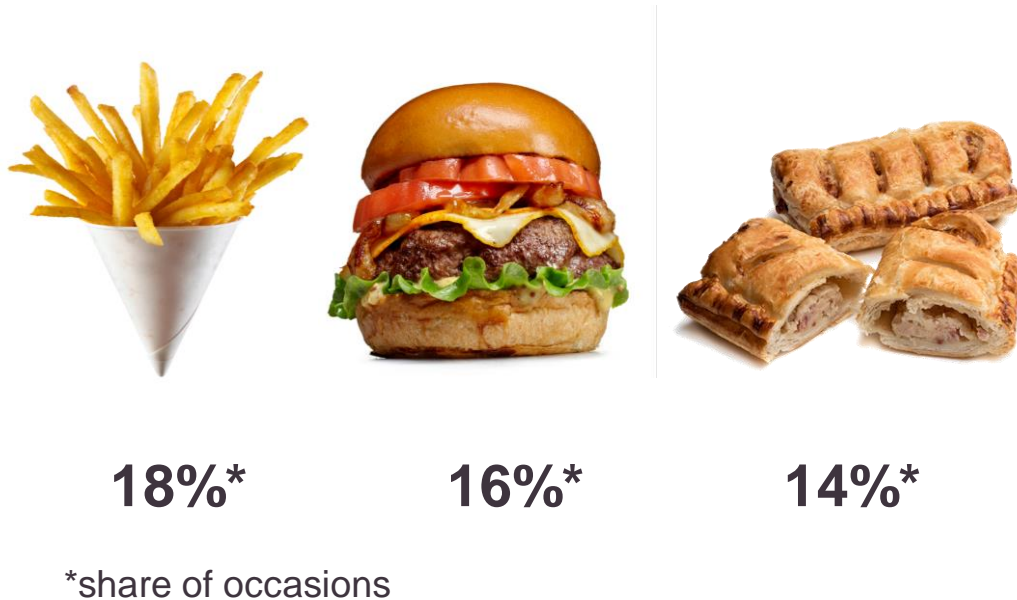


Source: Lumina Intelligence Food to Go Report, February 2022

FOOD TO GO OCCASIONS DOMINATED BY INDULGENT PRODUCTS

The top three food to go items consumed are **chips, burger and pastry** with almost a fifth of occasions involving chips

'**Treat**' is the second most common **consumer mission** for food to go, behind being out & about



Source: Lumina Intelligence Eating & Drinking Panel, 2020-22

INDULGENCE VS VIRTUE



TO SUMMARISE

What is the state of the FTG Market?



Consumers will restrict spending but the habitual and low-ticket nature of FTG will shield the market from the pressures faced by other channels.

How has covid affected NPD within FTG?



Rise of Premium, Health (veganism, low cal, GF) and indulgence vs virtue extremes

What are the growth opportunities?



Key trends to hit are digital loyalty schemes and rewards enhancing value credentials, Health vs indulgence NPD, international cuisines and products

Get in touch

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