

Lumina Intelligence

March 2025

Lumina Intelligence UK Food to Go Market Report

Brochure

Lumina Intelligence



Report Introduction

The **Lumina Intelligence Food to Go Market Report 2025** provides essential insights into a sector undergoing rapid transformation. As economic pressures, shifting consumer behaviours, and technological advancements reshape the market, this report delivers a data-driven analysis to help businesses understand key trends and future opportunities.

With inflation and changing discretionary spending influencing demand, the report examines **market performance, competitive positioning, and retail trends**, including outlet expansion and high-footfall locations. It also explores **operational challenges** and highlights **growth enablers** like digitalisation and convenience-driven demand.

Consumer preferences continue to evolve, with growing emphasis on **health, sustainability, and premium offerings**. The report details **spending patterns, key food-to-go occasions, and the increasing role of loyalty programmes and AI-driven ordering systems**.

Looking ahead, the report provides **market growth projections to 2028**. Offering comprehensive analysis and future-focused insights, the **Lumina Intelligence Food to Go Market Report 2025** is an invaluable resource for understanding the challenges and opportunities shaping the sector.



How to use this report

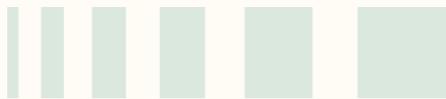


Report section:	Market Insight	Competitive Landscape	Consumer Insight	Future Outlook
Relevant teams	Commercial, finance, data and insight, holding company, board	Commercial, finance, data and insight, holding company, board	Brand, creative, data and insight and marketing	Commercial, finance, data and insight, holding company, board
Operator Questions answered	What does the market look like and how will changes impact my business case and forecast? What are possible gaps that can be capitalised on?	What can we learn from how larger and smaller brands are innovating? How are our business efforts impacting our market share?	How are consumers interacting and thinking about different brands? What are their motivations? What are the opportunities to be exploited?	How will the market change across the next three years and what are the threats and opportunities?
Supplier/ Wholesale Questions answered	What does the market look like and how will changes impact my customers? What factors will need to be priorities for supporting customers?	Who are the winners and potential customers in the restaurant market?	How are operators having to adapt to deliver against changing consumer needs? What can we do to support our customers?	How will the market change across the next three years and what are the threats and opportunities?
Investor Questions answered	What is the landscape and the opportunity for growth in the market?	Who are the key players in the market and how are they performing?	What are key consumer behaviours and considerations that a prospect needs to be prioritising?	How will the market change across the next three years and what are the threats and opportunities?

Source: Lumina Intelligence, March 2025

Sample Slides

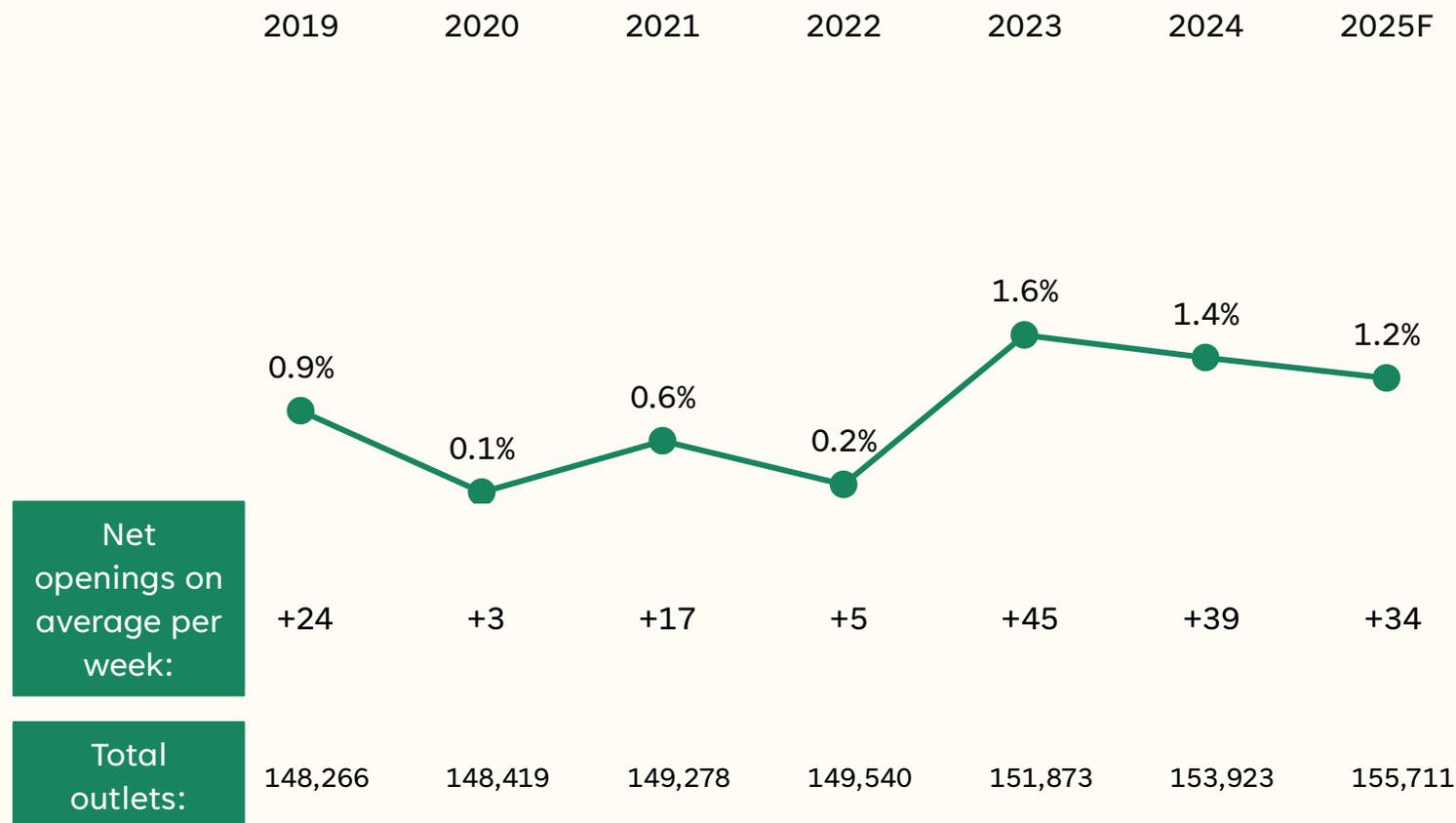




Business cost challenges are set to be a drag on outlet growth in 2025F

The UK food to go market is forecast to see relatively strong net space growth, driven by the expansion of varied formats and locations including travel hub, drive-thru and kiosk-style services. Changes to staff costs and business rates relief from April 2025 is expected to see operators rationalise new site opening plans where necessary to re-direct investment.

UK food to go market outlet numbers, net outlet growth and percentage growth, 2019-2025F



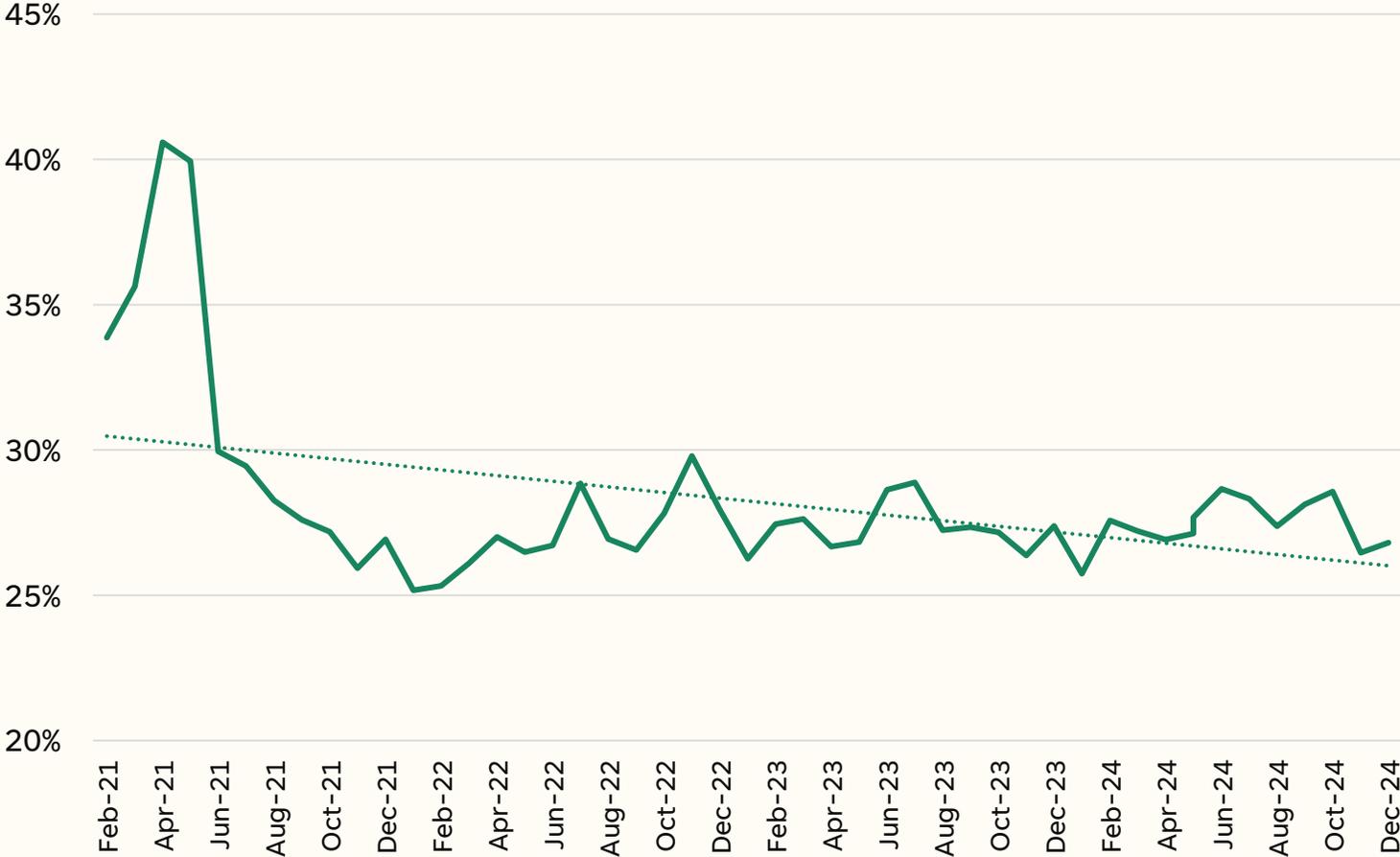
Source: Lumina Intelligence Market Sizing Insight & Analysis, March 2025



Food to go share of occasions fluctuates post-pandemic

The post-pandemic share of food to go occasions has settled between 25-30% of total eating and drinking out occasions. Share has fluctuated within this limit driven by external factors including the cost-of-living crisis, industrial rail strikes and weather. Food to go generally sees an uplift during the warmer, summer months.

Food to go share of total occasions, January 2021 – December 2024 ¹



Source: Lumina Intelligence Eating and Drinking Out Panel, data collected 4WE 24.01.2021 to 4WE 22.12.2024

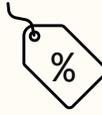
¹=Qn 33, 52 w/e n= 14,340

Promotion types shift towards instant gratification

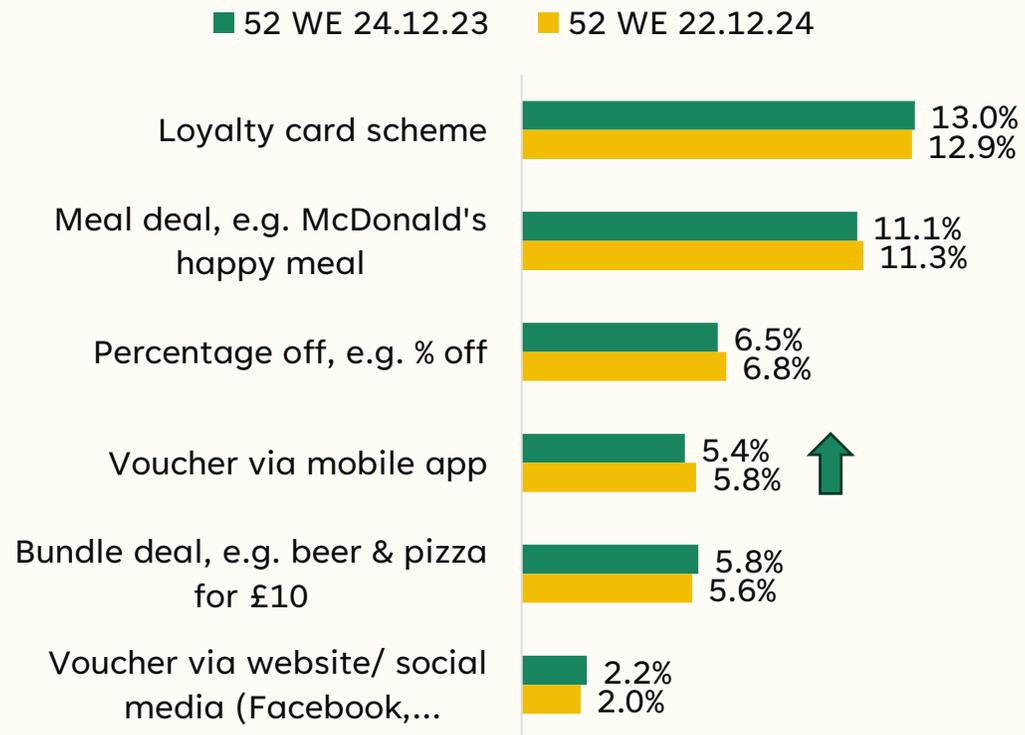
While changes in promotion type used is small, the most notable uplift comes from vouchers via mobile apps. This reflects a move away from loyalty and towards instant gratification.

Itsu's recent digital transformation has driven a 200% increase in app-driven transactions by focusing on immediate rewards. This drives frequency and value for money credentials in a climate where value remains paramount for consumers.

Food to go market – promotion type used ²⁹



Voucher or promotion used **40.5%**
+0.3ppts YoY



Itsu rewards on app



Source: MCA Hostech Conference, Lumina Intelligence Eating and Drinking Out Panel, 52WE 24.12.23 to 52 WE 22.12.24
29 = Qn 49 n = 13,829 / 14,340

New operators capitalise on the premiumisation of sandwiches



Quality-led

76%

Of consumers
Very Quality Led

11%

Choose a venue based on quality of ingredients
+1ppts YoY

Quality is increasingly dictating consumer choices in food to go and being incorporated into brand messaging and innovation. Additionally, quality is expected in the every day, leading to the elevation of classics, including sandwiches.



Sandwich Sandwich opened its first London site in 2024. The brand has a unique blend of flavours and dedication to quality ingredients, aiming to revolutionise the city's sandwich scene. Sandwiches are priced around £9, making them more expensive than neighbouring Pret A Manger or Subway sites, yet justified through large amounts of high-quality filling.

The team behind **Mondo Sando** has opened its first bricks and mortar site in Camberwell – **Café Mondo**, selling high quality and filling, freshly made sandwiches. The brand uses freshly baked bread from its next-door neighbour, Toad. The £12 price point of its most popular item - fish finger sandwich - is justified, regularly selling out and prompting long queues.

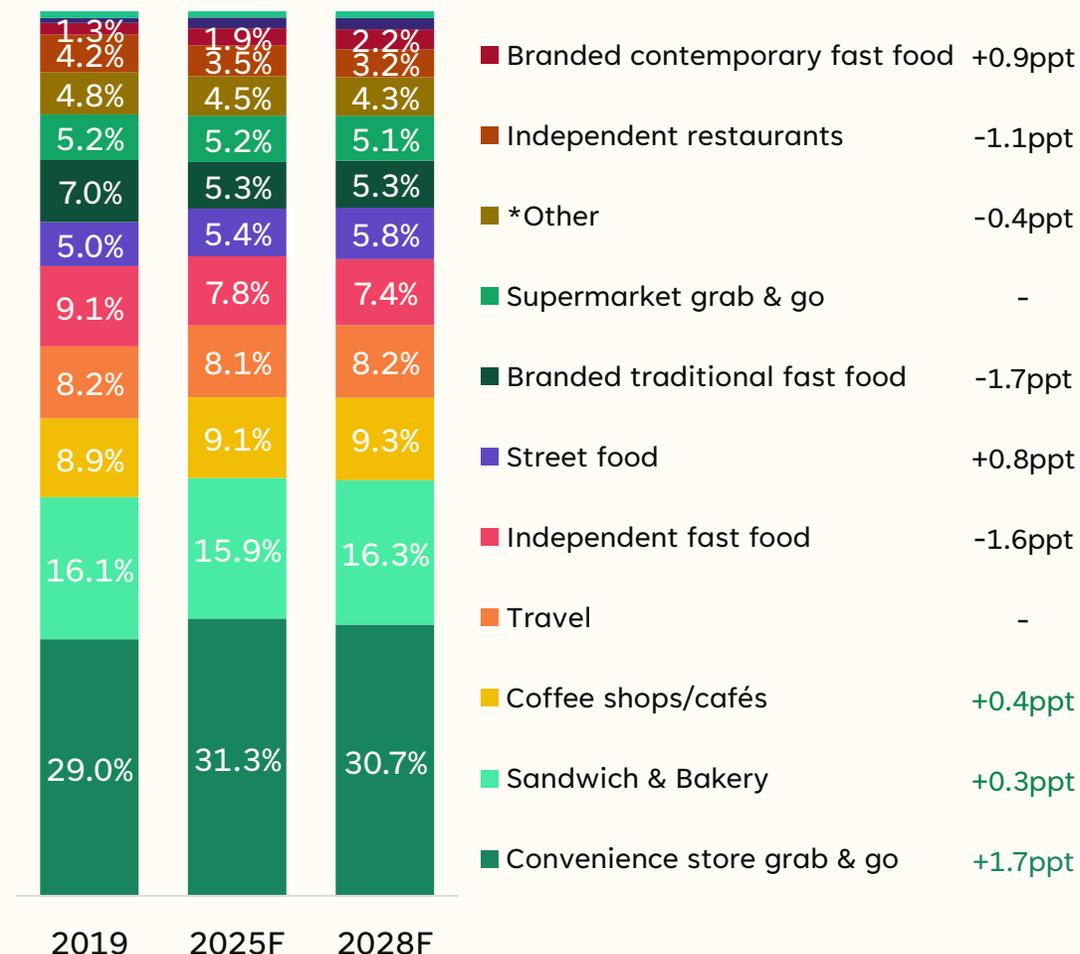


Source: Sandwich Sandwich, Café Mondo, Instagram, Lumina Intelligence Eating & Drinking Out Panel 52WE
24/12/24

Leading players have grown market share over time

The convenience store grab & go segment is forecast to see market share growth from 2019-2028F, driven by investment and innovation in store layouts and range of products to align more closely with more contemporary consumer tastes. Sandwich & bakery and coffee shop/cafés are continuing to expand into new locations and invest in products and a wider range of day-parts including breakfast and snack options. Fast food channels including independent and branded traditional fast food have seen declining market share, with the rise of the delivery segment taking a greater slice of these channels.

Leading channel share of food to go market, 2019-2028F



Source: Lumina Intelligence Market Sizing Insight & Analysis, February 2025, *Note: Other FTG includes spend from pubs, hotels, leisure, supermarket/department store/Garden Centre cafés and contract catering.

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Report Details



Format
Electronic PDF

Pricing
£3250

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Access
Corporate Access

Methodology



Eating & Drinking Out Panel

Lumina Intelligence's UK Eating & Drinking Out Panel tracks the behaviour of 1,500 nationally-representative consumers each week, building up to a sample of 78,000 every year, across all eating out channels and day-parts (including snacking)

2021-2025

Market Sizing & Operator Data Index

Market sizing data tracking the performance of hospitality and grocery operators, based on turnover and outlet numbers

Extracts from Operator Data Index and wider synthesis with total Eating Out market sizing

Lumina Intelligence Operator Data Index tracks and forecasts outlet and turnover information for over 400 brands across the eating out market

2019-2028F

Secondary external sources

Lumina Intelligence also uses external sources including desk research, GFK Consumer Confidence Index and EY Item Club economic indicators

Source: Lumina Intelligence, March 2025

**To learn more about how Lumina Intelligence can support you,
please get in touch using the contact details provided below.**

Get in touch

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