Lumina Intelligence

2025

Lumina Intelligence UK Foodservice Delivery Market Report

Brochure

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 brands and operators are innovating? How are our business efforts impacting our market share?	How are consumers interacting with the foodservice delivery market? 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 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

Report Introduction

The **Lumina Intelligence UK Foodservice Delivery Market Report 2025** is the definitive report on foodservice delivery, quantifying the **size** and **growth of the channel and market forecasts out to 2028,** with a detailed look at **growth drivers** and potential **inhibitors.** The report includes consumer insight from **Lumina Intelligence Eating and Drinking Out Panel**, which analyses consumer attitudes and behaviours, including key drivers to using foodservice delivery.

Our in-depth research reveals that **casual dining brands are rapidly expanding their delivery services**, with major operators enhancing **digital ordering platforms** to boost engagement. Consumers are increasingly looking for **value-driven offers**, with a notable rise in the purchase of **food and drink bundles**, driven by aggregator promotions. Looking ahead, the report identifies key **growth opportunities and threats** shaping the market through to **2028**.

As **consumer expectations evolve**, brands must **balance convenience, affordability, and healthier options** to drive sustained growth. Whether you're an operator, supplier, or investor, this report provides the **strategic insights needed to navigate the future of foodservice delivery in the UK**.

Sample Slides

Foodservice delivery market growth drivers, 2025F

Technological advancements are improving app functionality and encouraging higher frequencies as consumers have better experiences.

Higher importance

Internal	External
Investment in digitalisation of estates - ensuring sites are well equipped for delivery operations	**'On demand'** lifestyles driving demand for speedy delivery of meals, groceries and FMCG products
Prevalence of kitchens and **delivery only restaurants** in high density locations	Consumer uptake of technology including **delivery apps** and **digital ordering** solutions
Prevalence of **marketing** and **promotions** and emergence of **subscription models** driving spending	Technological advancements in **artificial intelligence** driving opportunities and improving customer experiences
Increased analysis and **support function abilities** from software-driven delivery operators	Perception of delivery as a **budget friendly alternative** to eating out amid the rising cost of living
Expansion of **healthier ranges** and those meeting specific **dietary requirements** including veganism	More **home working** boosting opportunities for delivered breakfast and lunch occasions
Wider availability of delivery in the eating and drinking out market	**Less structured eating patterns** driving growth in convenience-based channels

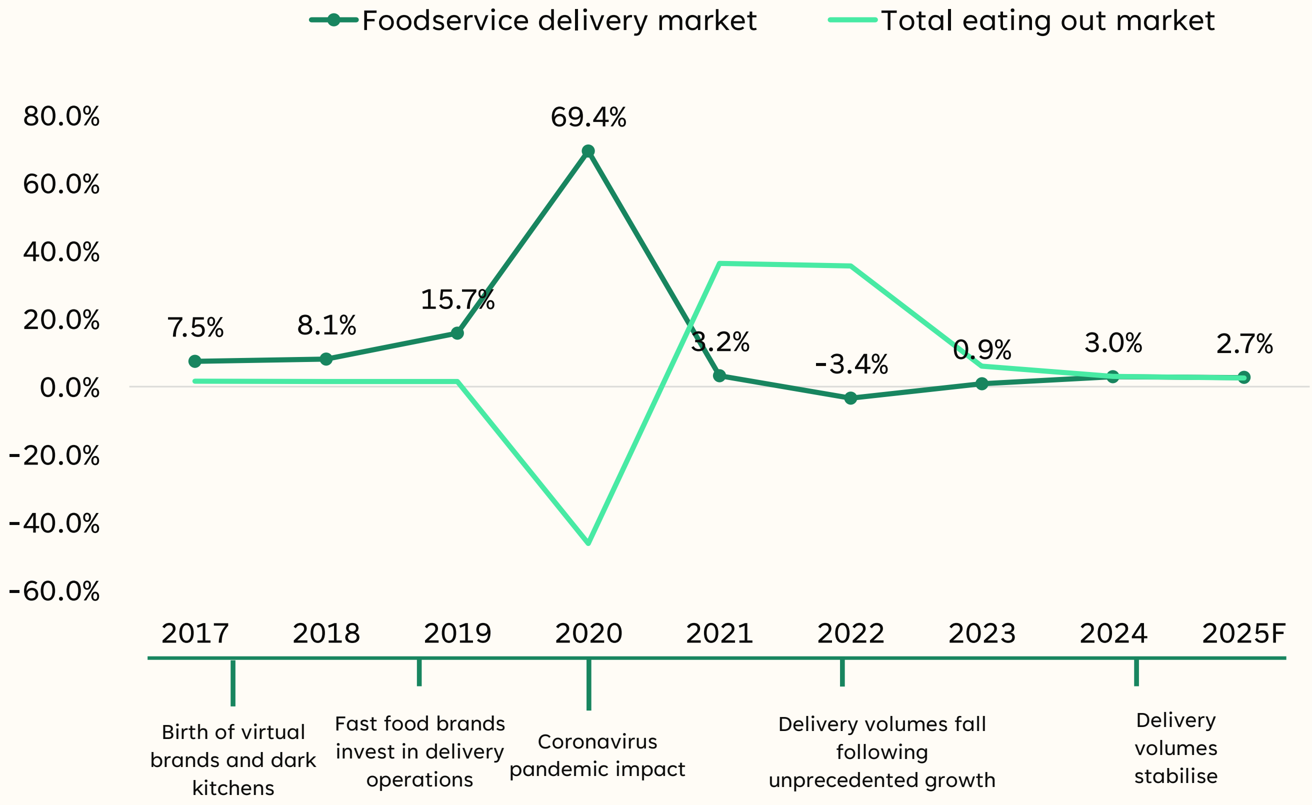
Lower importance

Source: Lumina Intelligence, March 2025

Foodservice delivery market growth stabilises in line with total eating out market growth

Foodservice delivery growth is forecast to mirror the total eating out market in 2025F, both benefitting from continued high inflation rates. The total market out-paced delivery market growth from 2021-2023, through recovery post-covid and falling delivery volumes from pandemic peaks.

UK foodservice delivery and total eating out market percentage turnover growth, excluding VAT & delivery fees 2017-2025F



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

Evolution of the UK foodservice delivery market

The UK foodservice delivery market continues to evolve rapidly, shaped by changing consumer preferences, technological innovation, and competitive dynamics. Hybrid and direct-to-consumer models emerging as standard with operators investing heavily in personalisation, AI-driven recommendations, and loyalty programmes to secure repeat custom and protect margins.

Pre-2015: Early growth and aggregator dominance	**2015-2019:** Market expansion & disrupter entry	**2020-2021:** COVID acceleration	**2022-Present:** Post-pandemic normalisation & consolidation
Vertically integrated models: Delivery market dominated by traditional pizza delivery and independent restaurant in-house delivery	**Software and logistics models:** Companies launch platforms to aid delivery for operators featuring software and logistics including delivery couriers	**Hybrid models:** Increased demand led to the launch of virtual brands and delivery-only kitchens while relying heavily on aggregators	**Direct-to-consumer models:** Prioritisation of brand-owned digital ecosystems, reducing reliance on third-party platforms to regain control

Source: Lumina Intelligence, March 2025

The sport opportunity: More consumers opted to get a delivery to watch sport for the Euros and Olympics

There is an opportunity for operators and aggregators to drive delivery penetration during notable sporting or other popular culture events.

During the time of the UEFA Euro 2024 competition and the Paris Olympics 2024 there was a notable uplift in delivery penetration, share of total eating out market occasions and consumers saying they ordered a delivery for the occasion of watching sport.

Delivery market penetration and share of total market occasions

Penetration	Occasion share	"Watching sports"
10.7%	**15.2%**	**18.4%**
+0.8ppts YOY	+1.5ppts YOY	+8.0ppts YOY

Source: Lumina Intelligence Eating & Drinking Out Panel, data collected data collected 9WE 11.08.24

Foodservice delivery market: 2025F-2028F

Geographical expansion, menu, service and value optimisation will be at the centre of growth strategies across the next three years as aggregators and operators look to add new users, increase frequencies and drive transaction values.

Development expectations, 2025F-2028F

Geographical expansion into suburban and rural areas will fuel growth in users and new opportunities for operators

Menu and service optimisation driven by artificial intelligence will encourage customer frequencies, higher spends and loyalty

Wider ranges including focus on all day-parts, drinks and premium and healthier will need to be a focus of aggregators

Value optimisation in the form of subscription models, loyalty schemes, meal deals and promotions will encourage uptake, frequency and loyalty

Partnerships between operators, aggregators and suppliers will improve experiences through service optimisation, limited time and exclusive offers

Experiential developments could see the emergence of more virtual and shared experiences including cooking classes, live events and group dining experiences.

Source: Lumina Intelligence, March 2025

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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)

2020-2025

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

2018-2028F

Top of Mind Business Leaders Survey

Lumina Intelligence Top of Mind business leaders survey - targeted at industry professionals across the eating out and grocery retail markets, to understand the trading environment, challenges and growth opportunities

July 2021-2024

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

Report Details

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

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