

Lumina Intelligence

2026

Lumina Intelligence UK Food to Go Market Report

Brochure



About the Report

The **Lumina Intelligence UK Food to Go Market Report 2026** provides a comprehensive view of a sector navigating cost pressures, cautious consumers and evolving demand for convenience. As operating costs rise and consumer routines continue to shift, the report delivers data-led insight into market performance, consumer behaviour, channel dynamics and competitive positioning across the food-to-go landscape.

The report explores how value perceptions, spend per visit and proposition strategy are shaping growth, alongside the changing role of convenience retail, supermarkets and foodservice operators within the channel. It also examines how return-to-office patterns, commuter corridors and travel hubs are influencing demand and location strategy.

Looking ahead, the report provides market forecasts through to 2028, helping food-to-go operators, retailers, suppliers and investors understand where sustainable growth will come from and how to position their strategies in an increasingly competitive market.



How to use this report



Report section:	Market Insight	Competitive Landscape	Consumer Insight/Growth Opportunities	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 food to go 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 food to go 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 2026

Sample Slides



Food-to-go: Poised for strategic, modest growth

£24.9bn

Market value (2026F)

+3.4%

Year on year growth (vs +2.4% eating out)

24.1%

food-to-go as a share of eating out (+0.2ppts YoY)



Who's growing: Location & formats

Growth anchored in travel hubs including air/rail corridors as passenger volume recovers.

Brands are moving to micro-concepts tactically placed in high footfall areas.

Convenience stores win on scale, but coffee shops, sandwich/bakery specialists as well as travel wining for turnover outlet growth.

How to grow: Trends & Technology



Premium, restaurant-quality options will gain traction, as consumers now treat food-to-go as a moment of enjoyment in a busy day.



Familiar options like chips and burgers dominate **but strong growth coming from pizza and wings**.



+2.7%
CAGR
2026-29

£27bn

Market value (2029F)

More operators turning to technology including AI for testing, product development and managing labour or inventory.



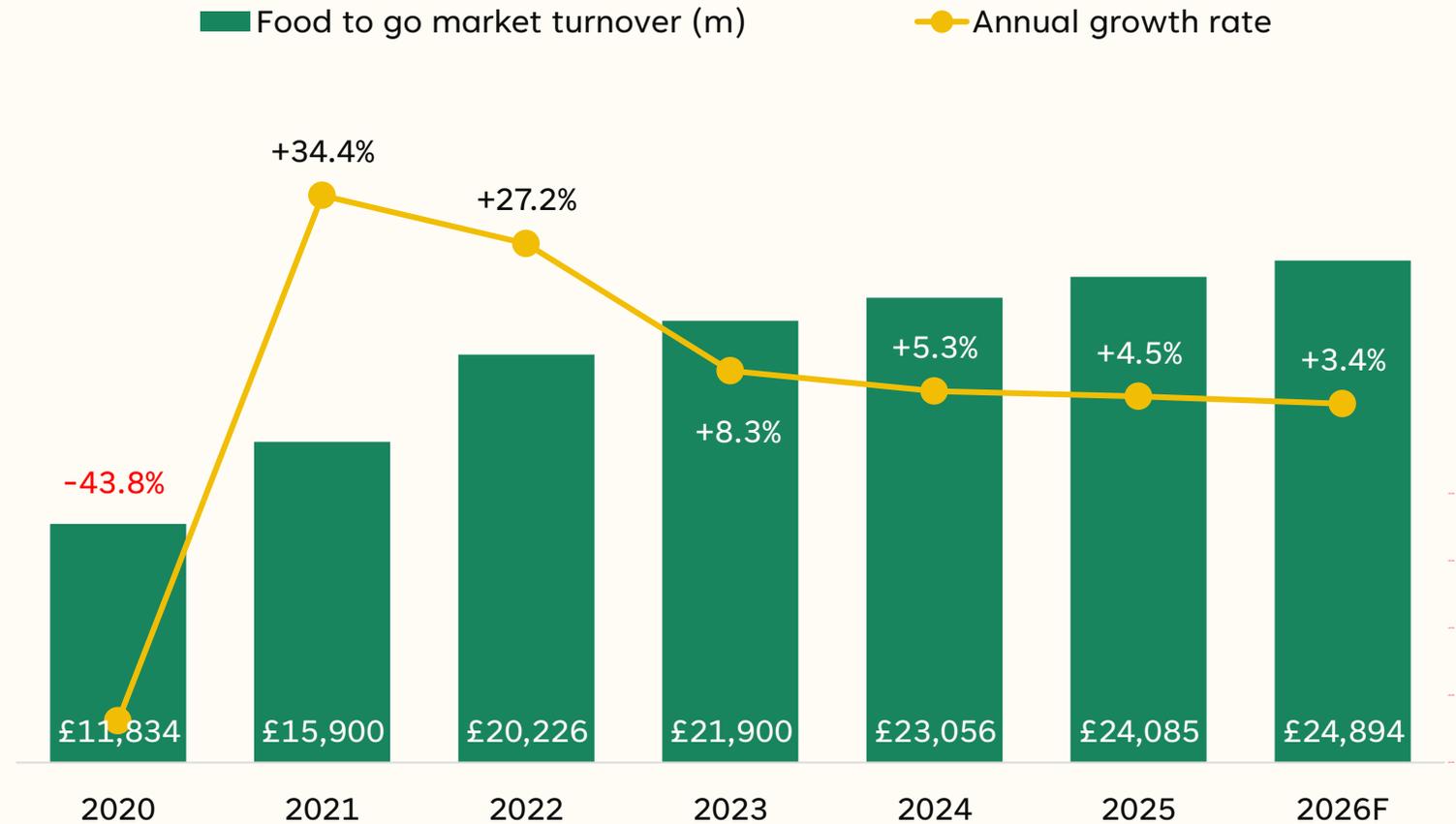
Source: Lumina Intelligence, March 2026



UK food-to-go market value in millions, with percentage growth, 2020-2026F

Stronger consumer demand and more premium options will drive food-to-go

The UK food-to-go market is set to rise +3.4% in 2026F, driven by rising office attendance and recovering travel flows across rail and air, boosting on-the-move meal occasions. Value-conscious lower earners are expected to increasingly opt for packed meals, while higher earners, bolstered by stronger financial confidence, will exhibit a greater willingness to trade up and spend on higher-quality, higher-priced food-to-go.



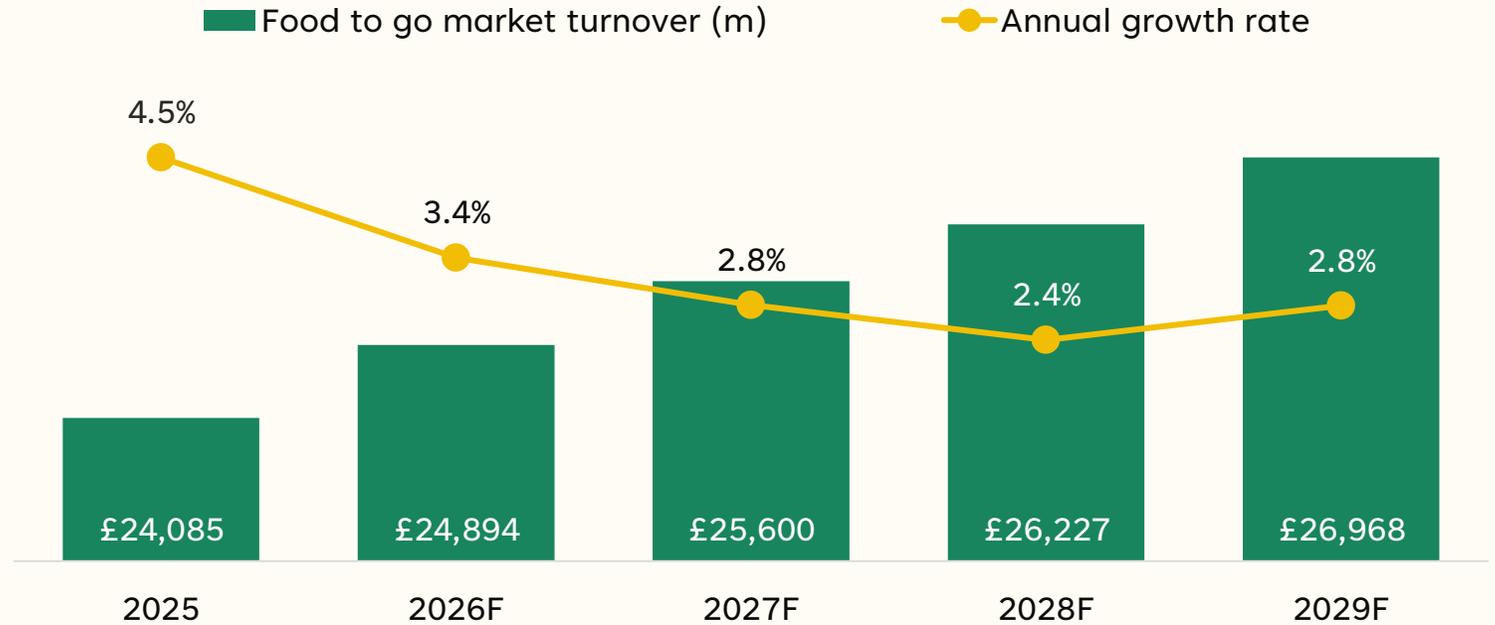
Source: Lumina Intelligence Market Sizing Insight & Analysis, February 2026



Food-to-go growth is set to slow over 2025-2029F

The gradual downward trend in inflation will see food-to-go market growth settle at +2.7% CAGR over 2026F-2029F. A stable economy, alongside marginal increases in wages, will lift demand for food-to-go. Key factors impacting the food-to-go market including tourism and travel are set to keep the market buoyant, growing faster than the wider market (+2.3%).

UK food-to-go market value in millions, with percentage growth, 2025-2029F



UK food-to-go market compound annual growth rate, value in millions, with percentage growth, 2016-2029F

2016-2019	2019-2022	2022-2025	2026F-2029F
+2.9%	-1.3%	+6.0%	+2.7%

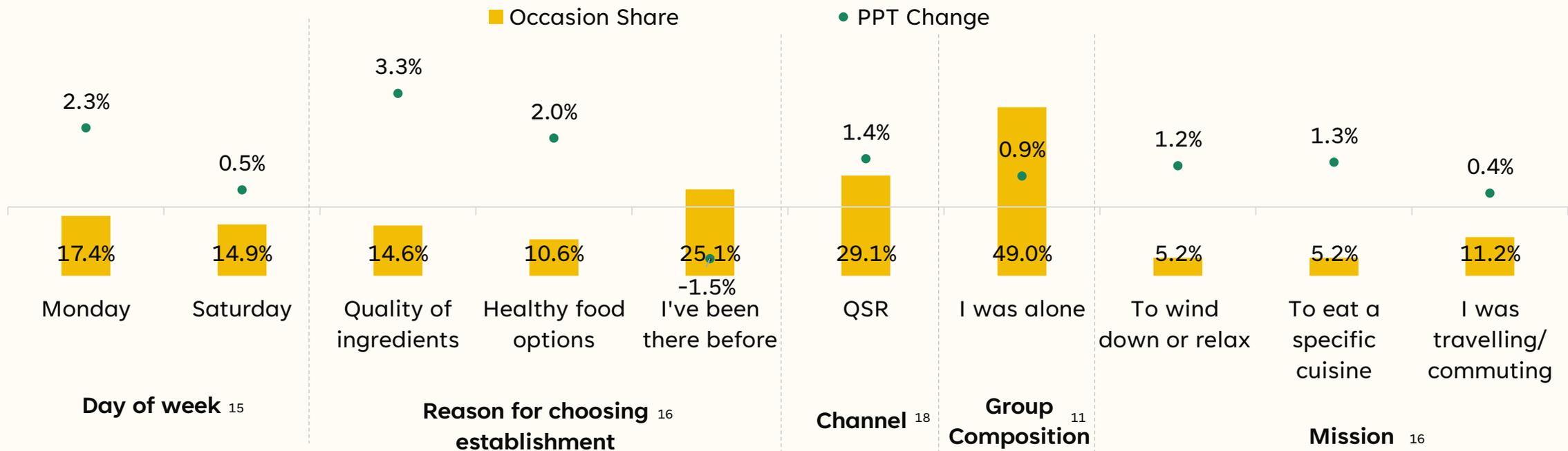
Source: Lumina Intelligence Market Sizing Insight & Analysis, February 2026

High quality QSR occasions fuel food-to-go



Monday and Saturday stand out as the key days for food-to-go lunch occasions, with quality and health playing an important role in consumer choice. QSRs remain the most popular lunch channel due to their convenience, while there is also growing interest in specific cuisines and food items. Hence, food-to-go is increasingly becoming a culinary destination, rather than simply a functional ‘quick meal’ option.

Food-to-go – lunch– share and year on year changes



Source: Lumina Intelligence Eating and Drinking Out Panel, data collected 52WE 21.01.24, 52WE 19.01.25, 52 WE 18.01.2
 15 = Qn31, 19 = Qn3, 16= Qn14, 18= Qn4A, 11 = Qn15, 23 = Qn16 , n=13,772, 14,424, 14,576

Sandwich and wrap trends focus on global flavours

To compete with artisan and specialist sandwich operators that exist outside of convenience, **supermarket brands are focusing on flavour innovation to boost the quality and premium credentials** of their core wrap and sandwich ranges, whilst maintaining accessible price points.

Operators are reframing the sandwich from functional lunch solution to discovery space. Global flavours offer both excitement and a point of differentiation, helping to bridge the gap between grab-and-go and foodservice, while encouraging consumers to see sandwiches and wraps as worthy of a higher spend and more considered choice.

The competition - sandwich specialists



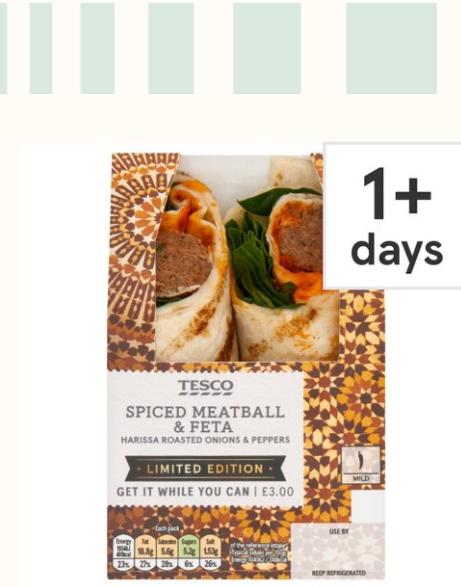
Mondo Sando, £12



My Favourite Sandwich, £11



McDonalds, £3.79



Tesco, £3.00



M&S, £4.00



Tesco, £3.85

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Report Details



Format
Electronic PDF

Pricing
£3,450

Publication
March 2026

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)

2020-2026

Source: Lumina Intelligence, March 2026

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

2018-2029F

Bespoke Product Data Collection

Leading food-to-go operators were surveyed for new products in January 2025 with findings compared to January 2024

Secondary external sources

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

**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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