

Lumina Intelligence

2026

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 2026

About the report

The **Lumina Intelligence UK Foodservice Delivery Market Report 2026** is the definitive report on foodservice delivery, quantifying the **size and growth of the channel and market forecasts out to 2029**, 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 **2029**.

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**.



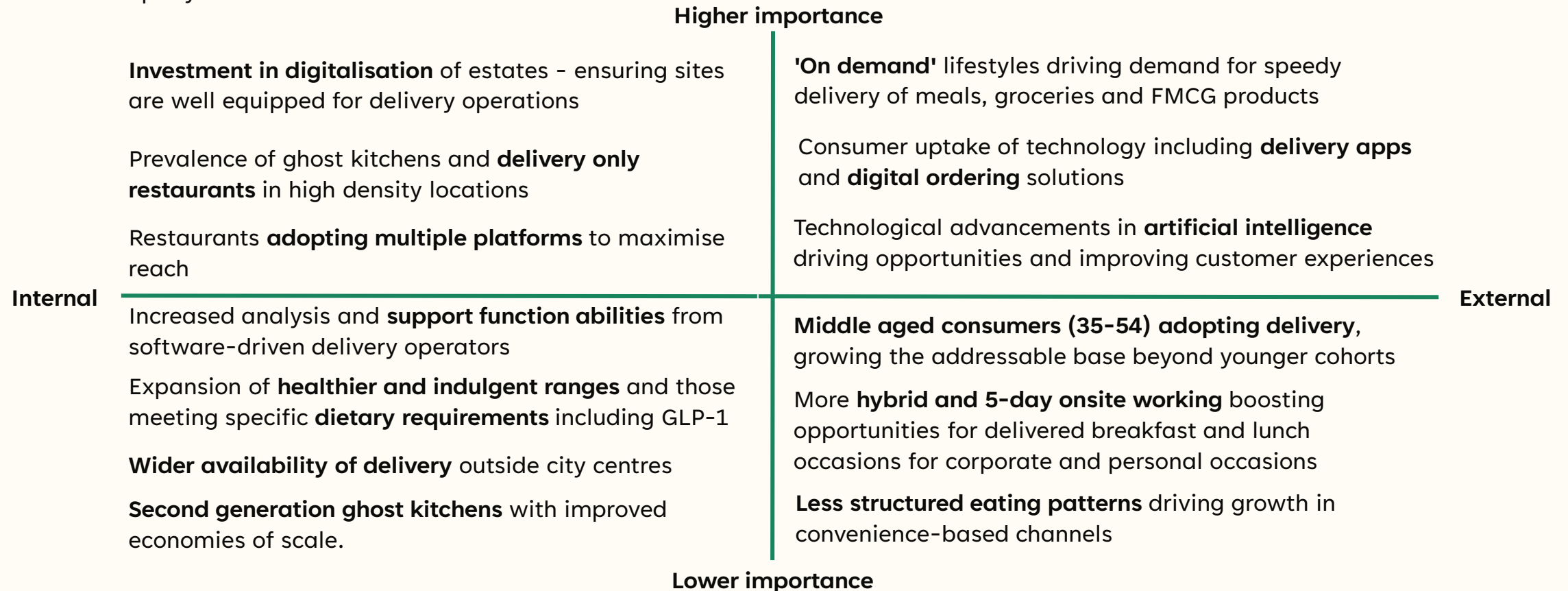
Sample Slides



Foodservice delivery market growth drivers, 2026F

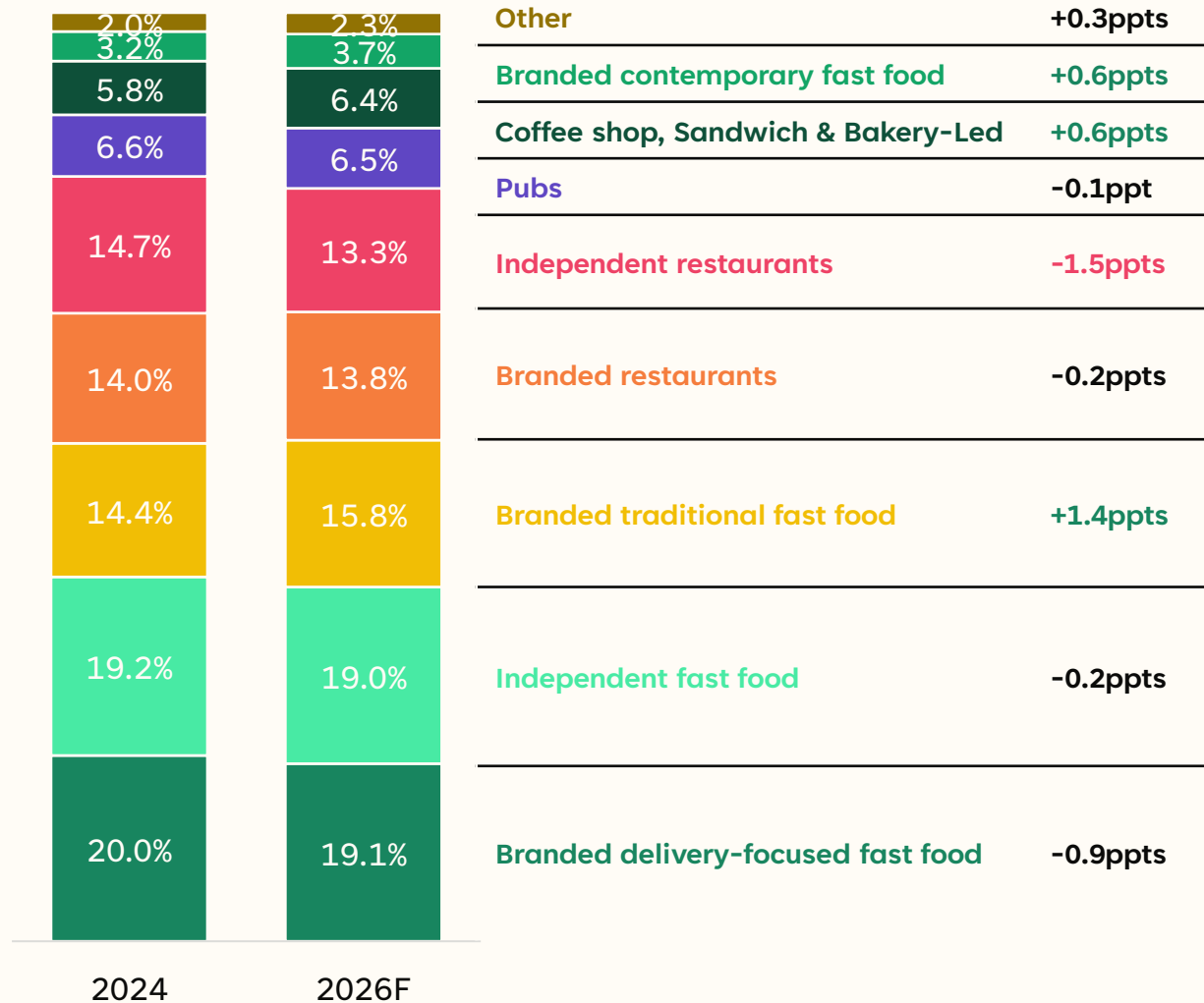


Technological advancements particularly AI, are being deployed to understand and influence consumer behaviour, and to continuously improve the customer journey. At the same time, there's an emphasis on product refinement, and growth opportunities within the corporate arena as more firms adopt hybrid or on-site mandates.



Source: Lumina Intelligence, March 2026

Leading channel share of foodservice delivery market, 2024-2026F



There's limited headroom for market share gain except for smaller delivery channels

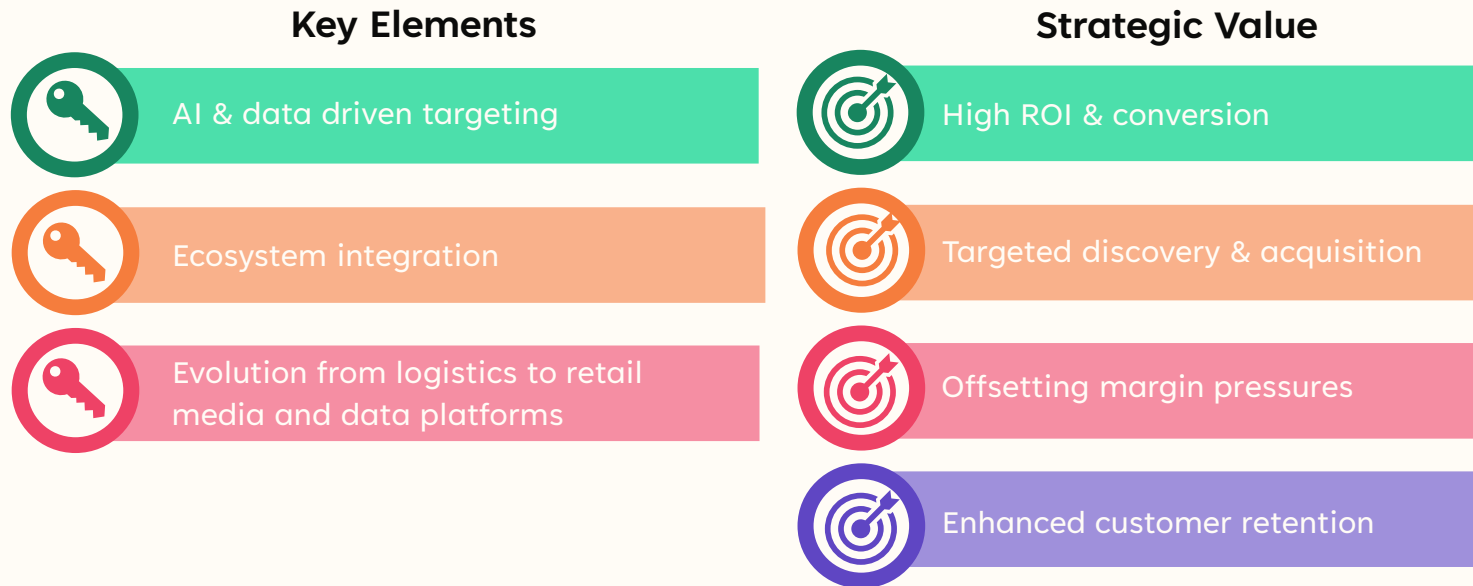
Branded delivery-focused fast food, independent and branded restaurants have shed a combined -2.6ppts in share since 2024. They're down from 64.5% in 2019 to 46.2% in 2026F. Aggregator expansion through Deliveroo and Uber Eats, including delivery-only kitchens and white-label solutions, has shifted spend toward traditional and contemporary fast food alongside coffee shops.

Convenience stores and supermarkets, which come under the 'other' banner, have also grown share through delivery platform partnerships.

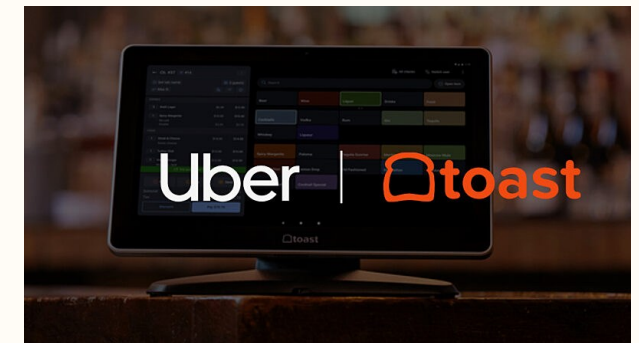
Source: Lumina Intelligence Market Sizing Insight & Analysis, March 2026

Delivery platforms growing revenue through tech-powered advertising

Food delivery aggregators are rapidly shifting from pure logistics providers to high-margin retail media and advertising businesses. They are increasingly acting as third-party advisers for brands, using their data, reach and technology to drive highly targeted advertising, and diversifying their revenue streams.



Uber Eats is rolling out promotion and local ads management tools directly to merchants using the Toast restaurant technology platform in 2026. This strategic partnership allows restaurants to seamlessly manage their ad campaigns from within their existing POS tech stack, reducing operational complexity.



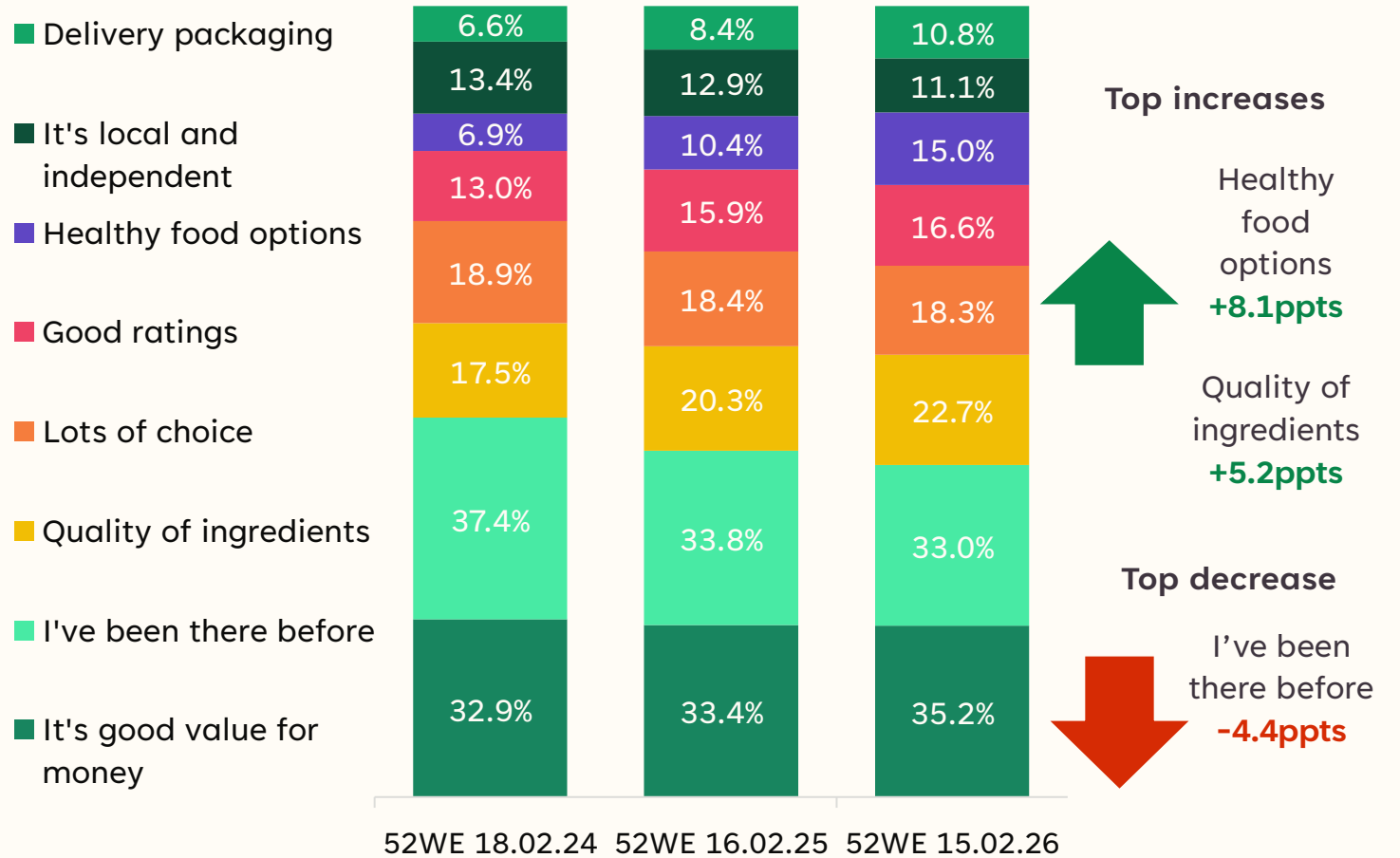
Source: Uber, Deliveroo, Just Eat, Toast, Lumina Intelligence, March 2026



Health and quality overtake brand familiarity

Health and quality posted significant increases as reasons for selecting a brand, while past experience declined. Consumers are increasingly looking to be wowed each time they order, with attributes like health and quality adding value to the experience, encouraging repeat custom.

Reasons for choosing brand (Top 10)¹⁸



Source: Lumina Intelligence Eating and Drinking Out Panel, data collected 52WE 18.02.24, 52WE 16.02.25 and 52WE 15.02.26

18=Qn16, 52WE, n=7,686 / 8,193 / 9,102



Development expectations, 2026F-2029F

Foodservice delivery market: 2026F-2029F

AI-powered value, service, menu and logistic optimisation, will be at the centre of growth strategies across the next three years as aggregators and operators look to retain users, build the acquisitions pipeline, increase frequencies and drive transaction values.



AI-powered service & logistics optimisation to augment wallet share, in place of geographic expansion



Menu optimisation driven by AI will encourage customer frequencies, higher spends and loyalty



Wider ranges including focus on all day-parts, drinks as well as premium and healthier options will be a focus of aggregators and brands



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, loyalty scheme integration, limited time and exclusive offers



Diversification of business models amongst aggregators, becoming tech-retail hybrids, including out of home advertising and the expansion of virtual brands

Table of Contents



Market Insight

- Foodservice delivery growth
- Consumer confidence
- Foodservice delivery market growth
- Foodservice delivery forecast in 2026F
- Delivery share of channels turnover, 2019-2026F
- Foodservice delivery market growth drivers, 2026F
- Foodservice delivery market growth inhibitors, 2026F

Competitive Landscape

- Delivery market resilience and adaptability
- Delivery aggregator growth drivers
- Aggregator share of delivery occasions
- Leading brands by delivery turnover and market share
- Growth strategies and concepts to watch among foodservice brands targeting growth in delivery

Consumer Insight

- Delivery market key metrics
- Demographics of delivery consumers and change over time
- Day-part share and channel share of delivery occasions and change over time
- Missions and occasions of delivery consumers and change over time
- Satisfaction ratings

Future Outlook

- Delivery market growth forecast, 2029F
- Delivery market share of the total eating out market forecast, 2029F
- Foodservice delivery growth drivers, 2026F-2029F
- Foodservice delivery growth inhibitors, 2026F-2029F
- Foodservice delivery market: 2026F-2029F trends

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

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

The Modern Consumer Survey

Lumina Intelligence Modern Consumer survey – 3,000 adults were asked about their beliefs and attitudes towards health, value, quality, provenance, customisation, experiences and technology

June 2025

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 2026

Report Details



Format
Electronic PDF

Pricing
£3,450

Publication
April 2026

Access
Corporate Access

**To learn more about how Lumina Intelligence can support you,
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