



Consumer Foodservice By Location in the United Kingdom

March 2026

KEY DATA FINDINGS

2025 DEVELOPMENTS

High-footfall sites concentrate growth across travel, retail and high street locations

INDUSTRY PERFORMANCE

Travel and retail locations benefit from high-throughput foodservice formats

Standalone outlets see further growth in 2025

Fulfilment and value considerations shape performance across locations

WHAT'S NEXT?

Travel to remain most dynamic non-standalone location over forecast period

Standalone locations to remain resilient drivers of foodservice value growth

Structural pressures reshape opportunities across consumer foodservice locations

Demographic shifts to increasingly shape consumer foodservice performance by location

COMPETITIVE LANDSCAPE

Travel locations remain dominated by high-footfall, brand-led operators

Retail locations prioritise convenience, mixed-use formats and experiential offerings

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Consumer Foodservice in the United Kingdom - Industry Overview

EXECUTIVE SUMMARY

Chains lead value growth through price rises and convenience offer

KEY DATA FINDINGS

INDUSTRY PERFORMANCE

Price-led growth underpins value expansion amid subdued volumes

Convenience-led occasions sustain everyday demand
Experiences and loyalty strengthen engagement in a pressured environment

WHAT'S NEXT?

Growth to remain resilient but increasingly selective
Innovation shifts towards formats, menus and operating models
Sustainability will become pragmatic and cost-driven

COMPETITIVE LANDSCAPE

Market leadership reflects scale, throughput and efficiency
Challenger brands deliver momentum through focused formats and cuisine-led appeal
Portfolio rationalisation and format repositioning reshape competition

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Chains consolidate value leadership as independents face pressure
Fulfilment strategies balance convenience and cost sensitivity

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