**A close up of a logo

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**UK food to go market to contract £6bn in 2020, but market recovery expected by end 2022**

According to the brand-new Lumina Intelligence UK Food To Go Market Report 2020 Update, the UK food to go market is set to decline £6bn in 2020, as a result of the coronavirus pandemic. However, the report forecasts that turnover of the food to go market will recover to close to its 2019 level by the end of 2022.

The UK food to go market experienced a decade of growth through the 2010’s. Lumina Intelligence valued the market at £21.3bn for full year 2019, a growth of +2.4%. However, the catastrophic impact of the coronavirus pandemic is set to wipe £6bn off the market value in 2020. This equates to a decline of -29%, taking the market value to £15bn.   
  
Relative to the overall eating out market, food to go is somewhat insulated and as a result this decline is lower than that forecasted for the total sector. Consequently, the share of the total eating out market held by food to go, is set to increase to 27.4%, up from 23.3% in 2019.

With advice to ‘stay at home’, the coronavirus pandemic restricted movement for most. The number of people working from home in the UK reached a peak of 60%, causing a significant decline in city centre footfall. The average number of food to go visits per consumer per month has dropped 25% year-on-year, with lunch the most impacted daypart, with a fall in frequency of -37%.

Coffee shops/cafés have been the strongest performers over the last year, increasing share across all day parts but most significantly at dinner (+1.7pp). In terms of overall share, convenience store grab and go dominates the market at a value of £5bn – representing a 33% share of the total market in 2020.

Despite a significant reduction in value this year, the food to go market is set to recover quickly due to its versatility, low contact and value-led proposition. By the end of 2021, Lumina Intelligence forecasts the market to be worth £21.2bn, just behind 2019 turnover of £21.3bn and a growth of +41% vs. 2020 forecasts.

Blonnie Walsh, Head of Insight at Lumina Intelligence said, *“The sudden shift from a highly transient, on-the-go society, to one with restrictions placed on movement has had a catastrophic impact on the UK food to go market. With much of the UK workforce working from home or furloughed, footfall in city centres nose-dived.”*

*“However, the sudden setback is not expected to last. The food to go market is forecast to grow by over 40% in 2021, returning the market value to around the 2019 level. The very nature of food to go, whereby it is not consumed on premise, it is relatively inexpensive and much of the customer base of the major players are already back at work, means the sector is well insulated for a swift recovery.”*

**ENDS**

**Report methodology**

The data within the Lumina Intelligence UK Food To Go Market Report 2020 Update was collated using:

* 72,000 online surveys (6,000 per month) through Lumina Intelligence’s Eating Out Panel, FY 2018-2019.
* Insight from Lumina Intelligence’s Channel Pulse. 1,000 weekly interviews with consumers engage with the UK food and drink market. Surveys conducted between 23 March – 6 September 2020.
* Extracts from the Lumina Intelligence Operator Data Index. A comprehensive database of over 700 UK hospitality operators.
* Research from the Lumina Intelligence UK Recovery Report (May 2020)

**About Lumina Intelligence**

Lumina Intelligence inspires the global food and drink sector with deep, actionable insights powered by the world’s best analytics technology. Our products and services are used by the major brands and organisations in these fast moving and growing markets to support business planning, strategic marketing and new product development.

With offices in London, Chicago, Montpellier, and Singapore, and local on the ground analysts across our businesses, you can trust our market knowledge. We are committed to providing all our customers with up to date accurate information to support critical decision making.

Combining the expertise and experience of HIM, MCA Insight and Lumina Intelligence, we are the experts in market and consumer insight across the food & drink and nutrition markets.

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