**CONTACT INFORMATION:**

**Lumina Intelligence**

**Giorgio Rigali**

**07545990030**

**Giorgio.rigali@lumina-intelligence.co.uk**

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**UK food to go market to grow +32% in 2021 to £15.3bn, 72% of its 2019 market value**

According to the new Lumina Intelligence UK Food To Go Market Report 2021, the UK food to go market suffered a -45.5% decline in 2020, as the coronavirus pandemic severely restricted travel and movement.

However, with restrictions easing and the vaccination programme moving swiftly, the report forecasts growth of +31.6% to £15.3bn in 2021, representing 72% of its 2019 value, before wider recovery and growth will see the channel reaching a value of £22.6bn in 2024.

Less restriction exposed and low-ticket channels are best placed for recovery with convenience store grab and go, supermarket grab and go, sandwich & bakery and travel all expected to recover more swiftly, to over 74% of their pre-pandemic value in 2021.

The report identifies that some of the shorter-term challenges for the sector will evolve into longer term opportunities, spearheaded by shifts in the way that consumers interact with food to go:

**Outdoor socialising**

In the next few months as social restrictions ease, food to go is well placed to capitalise on the outdoor socialising occasion. 21% of consumers say they are likely to purchase food to-go and eat it in a park in the future and this figure rises to 38% for 18-24’s.

Operators including Pizza Pilgrim’s, German Doner Kebab and Megan’s Restaurants have already begun to develop propositions that offer portable and high-quality picnic-style meal solutions.

**Hybrid working patterns**

34% of consumers are planning to work from home in the future, with over half of this proportion bullish in their preference for a high proportion of their workdays to be spent at home.

Food to ‘go home’ is a particular focus, with operators including Costa, Pret A Manger and Marks & Spencer already targeting this occasion with new products featuring clear heat-at-home instructions.

**The coffee opportunity**

Coffee has dominated food to go drinks occasions lately, enjoying a 50% share of total drinks consumed over the last 4 months. Reflecting the increase in socialising in outdoor spaces, younger consumers are the most active on coffee walks, with almost 1 in 4 having picked up the habit of purchasing a hot drink to go when on a walk with a friend since March 2020.

The Top 10 food to go channels can look forward to a £1.1 billion sales opportunity between 2022 and 2024, with sandwich & bakery and coffee shop/café segments poised to lead in absolute terms; underpinned by physical outlet growth, a core focus on takeaway/to-go and continued consumer aligned new product development.

Convenience store grab & go remains the largest food to go sub-channel but it's contribution to growth will fall as it comes under increased pressure to compete with dedicated food to go specialists.

Katherine Prowse, Insight Manager at Lumina Intelligence said, *“The sudden shift from a highly transient, on-the-go society, to one with restrictions placed on movement had a significant negative impact on the UK food to go market in 2020, with much trade diverted to other routes to market such as delivery. However, buoyed by the easing of restrictions and the swift vaccine rollout, we will see a resurgence of the market in 2021, before a full recovery to pre-pandemic sales levels by 2024.”*

*“Retail-led food to go channels that are less exposed to tight restrictions and offer low-ticket solutions are best placed to recover quicker. However, operators and retailers will be forced to adapt. The continuation of home and hybrid work patterns for many and the rise in outdoor socialising will result in changes to the ways in which consumers will interact with food to go. Portable food to go solutions will strike appeal with consumers meeting friends/family in parks, whereas a shift in focus on food to ‘go home’, will provide a relevant solution to those home working.”*

**ENDS**

**Report methodology**

The data within the Lumina Intelligence UK Food To Go Market Report 2021 was collated using:

* Consumer eating out behaviour across all UK eating and drinking out channels through the Lumina Intelligence Eating & Drinking Out Panel, based on 78,000 interviews each year
* Consumer attitudes and future intentions based on a bespoke survey (n=1000 nat rep)
* Operator sales and outlet performance from Lumina Intelligence’s Operator Data Index
* Supported by commentary/soundbites from senior business leaders and journalists from within the sector

**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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