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**Wagamama and Nando’s to lead to outlet expansion amongst branded restaurants in 2021**

New research using Lumina Intelligence’s Operator Data Index indicates that the branded restaurant segment of the UK eating out market is set to experience outlet decline of -0.5% in 2021, following a catastrophic 2020, which saw outlet numbers decline by -17.1%.

The top 10 branded restaurants in the UK saw outlets decline at the slower pace versus the total branded restaurant segment, at -12.9% in 2020. This equates to a net loss of 280 sites in 2020.

In contrast, the top 10 branded restaurants are expected to see outlet decline outpace the overall segment in 2021. The top 10 are forecast to decline by -2.2% in 2021 compared to the total segments forecasted -0.5% decline.

Expected to grow by +7 and +5 sites in 2021 respectively, Wagamama and Nando’s are continuing to add to estates with propositions that meet consumer needs well. Furthermore, a high volume of empty properties as a result of the 2020 losses is set to provide opportunities for stronger operators to take on attractive sites for more affordable prices.

At the other end of the scale, Pizza Hut Restaurants and Prezzo are set to see outlet decline accelerate in 2021. Pizza Hut Restaurants is set to exit 29 sites in 2021 with its CVA being approved in late 2020. The brand is rationalising its estate to safeguard the majority of sites as it looks to move further into delivery. Prezzo is to close 22 sites permanently following the company’s acquisition by a new company owned investment firm Cain International.

Katherine Prowse, Insight Manager at Lumina Intelligence says, “After an incredibly challenging year, we expect to see outlet numbers stabilise in 2021, with the branded restaurant segment emerging as a leaner but stronger channel with estates rationalised and strategies in place to evolve, aligned with post coronavirus consumer needs.”

“The growth of Nando’s and Wagamama highlights the opportunities available for branded restaurants that adapt and meet the needs of consumers. The growth of delivery will continue to put pressure on operators to rationalise estates, as well as business strategies, but as consumer confidence grows and restrictions ease, we expect to see demand for dine-in solutions return swiftly.”

Find out more about the Lumina Intelligence Operator Data Index [here](https://www.lumina-intelligence.com/product/operator-data-index-grocery-data-index/).

**ENDS**

**Report methodology**

The Lumina Intelligence Operator Data Index is a tool that tracks the performance of hospitality operators, providing market rankings based on turnover and outlet numbers, segmented by sub-channels.

Our Operator Data Index includes:

* Comprehensive data on 700+ leading UK hospitality operators
* Access market rankings, sales and outlet counts and monthly analysis presentations.

**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.

<https://www.lumina-intelligence.com/>