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**Top 10 UK casual dining brands set to grow outlets by +1.1% in 2022**

According to the latest data from the Lumina Intelligence Operator Data Index, the top 10 UK casual dining brands are forecast to grow its combined outlet count by +1.1% to 5,566.

This growth is set to be driven by Pret A Manger (+7.5%), Nando’s (+4.0%) and KFC (+2.1%). In contrast, Pizza Hut Restaurants and Sizzling Pubs are expected to reduce the size of their estates. The growth forecast for Pret follows an ambitious expansion strategy that will target consumers in suburban locations that are working from home.

This estimated growth, is +0.1ppts higher than the outlet growth forecast for the entire casual dining segment, which will not see it fully recover to pre-pandemic outlet volumes.

In terms of fastest growing brands, by outlets, within the casual dining segment, Megan’s is set to see outlet growth of +4 sites or +28.6%, Sports Bar & Grill +3 outlets or +25.0% and Pizza Pilgrims +4 outlets or +23.5%. German Doner Kebab is forecast to add the largest net number of sites (+11). The brand has achieved rapid UK expansion through franchise and a focus on delivery and takeaway trading.

Branded restaurants are expected to grow (+1.2%) for the first time in five years, following decline from 2018 to 2021. Rosa’s Thai and Pizza Pilgrims are expected to lead outlet growth in 2022, following strong delivery trading throughout the pandemic.

Pub and bar restaurant brands are expected to grow minimally at +0.3% in 2022 after consistent decline in outlets from 2018. Sports Bar & Grill, Brewdog and The Lounges lead growth at +25.0%, +11.4, and +9.5% respectively.

Traditional fast food is expected to increase by +0.8% in 2022, following consistent growth for the past five years. This segment was less vulnerable over the course of the pandemic due to brands being able to leverage trading through delivery.

Commenting on the findings, Senior Insight Manager at Lumina Intelligence, Katherine Prowse, said: *“Casual dining is well placed to recover from the impact of the pandemic. This is apparent in the forecasted outlet expansion. More successful brands have been agile throughout the pandemic, closing poorly performing sites and re-evaluating location and product strategies, as well as pivoting to delivery. This puts them in a strong position post-pandemic.”*

Find out more about Lumina Intelligence’s Operator Data Index [here](https://www.lumina-intelligence.com/product/operator-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 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/>