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**01 March 2022**

**UK foodservice delivery market to grow +5.3% in 2022, to a value of £13.3 billion.**

According to the new Lumina Intelligence UK Foodservice Delivery Market Report 2022, the UK foodservice delivery market is forecast to grow by +£0.7bn in 2022, to a value of £13.3bn.

This follows strong growth of +6.5% in 2021, bringing the total value of the market to £12.6bn currently. In total, the report forecasts total market growth between 2019-2022 to be +£5.7bn.

The foodservice delivery market is expected to hold a 12.2% share of the total UK eating out market in 2022, despite wider market recovery.

From an aggregator perspective, the top three delivery aggregators – Just Eat, Uber Eats and Deliveroo – hold a combined share of 69.9% of all foodservice delivery occasions. Just Eat has grown its share of foodservice delivery occasions to account for over 1 in 3 (36%) in 2022.

From a brand perspective, the top five foodservice delivery brands – Domino’s, McDonald’s, KFC, Papa John’s and Pizza Hut Delivery - comprise of just under one third (29%) of the delivery market in terms of share. McDonald’s and KFC have doubled their shares of the delivery market from 2019-2022, to 8% and 4%, respectively.

**Delivery has become habitual, with consumers becoming more price conscious**

12% of UK adults order foodservice delivery at least once per week, with this peaking at 15% during the third lockdown period. Penetration has remained around 12% from June 2021 to January 2022, despite restrictions easing and dine in reopening. Delivery has been able to successfully maintain new customers brought into the channel throughout the pandemic.

Familiarity, as a reason for choosing a particular establishment to order foodservice deliver from, is key, accounting for 38% of occasions. However, whilst familiarity is the top need in foodservice delivery, its importance has declined by -4ppts year-on-year, as consumers show more willingness to try somewhere different. ‘It’s good value for money’ has risen by +2ppts to be only 3ppts behind familiarity as the pandemic and rise in cost of living puts a strain on consumer finances.

**UK foodservice delivery market expected to total £14.6 billion in 2025**

The UK foodservice delivery market is expected to total £14.6 billion in 2025, with robust growth of +3.2% per year from 2022-2025.

The branded traditional fast-food channel is expected to lead value growth in the market from 2022-2025, with leading players including McDonald’s and KFC focusing on leveraging delivery. The channel is expected to hold an 18% share of the market in 2025, up from 8% in 2019.

Blonnie Whist, Insight Director at Lumina Intelligence said, *“"After two years of on-off restrictions across the UK eating and drinking out market, the use of foodservice delivery has become habitual to consumers, with no sign of demand waning over the coming years. As a result, it is no longer an either/or scenario for operators, but a necessity in order to recover from the effects of the pandemic swiftly. This is evident in our forecasts that suggest delivery's share of the total eating out market will grow each year over the next three years. However, consumers are becoming more demanding and adventurous. Healthier options, sustainable packaging and a wider coverage across day parts other than dinner are all areas that will be key to growth for operators."*

Find out more about Lumina Intelligence’s UK Foodservice Delivery Market Report 2022 [here](https://store.lumina-intelligence.com/product/uk-foodservice-delivery-market-report-2022/).

**ENDS**

**Report methodology**

The Lumina Intelligence UK Foodservice Delivery Market Report 2022 brings together various data solutions from Lumina Intelligence:

* Consumer eating out behaviour data based on 78,000 surveys across the year from Lumina Intelligence’s Eating & Drinking Out Panel.
* Analysis of leading delivery players from Lumina Intelligence Operator Data Index, which tracks the performance of 350+ leading operators
* Market sizing data tracking the performance of hospitality and grocery operators, based on turnover and outlet numbers

**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/>