



Self-Service Cafeterias in the United Kingdom

March 2026

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Self-Service Cafeterias in the United Kingdom - Category analysis

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2025 DEVELOPMENTS

Price-led gains mask structural contraction

INDUSTRY PERFORMANCE

Revenue growth persists despite fewer outlets and transactions

Chained selfservice cafeterias lead growth through efficiency and innovation

Health, personalisation and value sustain relevance in selfservice cafeterias

WHAT'S NEXT?

Priceled growth sustains selfservice cafeterias as independents decline

Evolution of fulfilment and value

Sustainability becomes core operational driver in selfservice cafeterias

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Tesco leads landscape in 2025

John Lewis expands through concept diversification

Chained operators hold highest share in value terms

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Consumer Foodservice in the United Kingdom - Industry Overview

EXECUTIVE SUMMARY

Chains lead value growth through price rises and convenience offer

KEY DATA FINDINGS

INDUSTRY PERFORMANCE

Price-led growth underpins value expansion amid subdued volumes

Convenience-led occasions sustain everyday demand

Experiences and loyalty strengthen engagement in a pressured environment

WHAT'S NEXT?

Growth to remain resilient but increasingly selective

Innovation shifts towards formats, menus and operating models

Sustainability will become pragmatic and cost-driven

COMPETITIVE LANDSCAPE

Market leadership reflects scale, throughput and efficiency

Challenger brands deliver momentum through focused formats and cuisine-led appeal

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