



# Cafés/Bars in the United Kingdom

March 2026

Table of Contents

## Cafés/Bars in the United Kingdom - Category analysis

### KEY DATA FINDINGS

#### 2025 DEVELOPMENTS

Chains extend lead as coffee-led routines offset pub weakness

#### INDUSTRY PERFORMANCE

Value growth in cafés/bars driven by chains despite ongoing outlet rationalisation

Specialist coffee and tea shops records strongest momentum

Cafés/bars adapt fulfilment to balance routine consumption with value

#### WHAT'S NEXT?

Cafés/bars set to deliver modest, chain-led growth amid continued outlet contraction

Fulfilment evolves towards faster, lower-cost and more flexible formats

Sustainability shifts from brand positioning to operational innovation

#### COMPETITIVE LANDSCAPE

Scale and estate breadth remain central to competitive leadership in UK cafés/bars

Specialist coffee and tea shops drive strongest company-level momentum in 2025

Chained operators dominate value sales, while independents remain concentrated in cafés

#### CATEGORY DATA

Table 1 - Cafés/Bars by Category: Units/Outlets 2020-2025

Table 2 - Sales in Cafés/Bars by Category: Number of Transactions 2020-2025

Table 3 - Sales in Cafés/Bars by Category: Foodservice Value 2020-2025

Table 4 - Cafés/Bars by Category: % Units/Outlets Growth 2020-2025

Table 5 - Sales in Cafés/Bars by Category: % Transaction Growth 2020-2025

Table 6 - Sales in Cafés/Bars by Category: % Foodservice Value Growth 2020-2025

Table 7 - GBO Company Shares in Chained Cafés/Bars: % Foodservice Value 2021-2025

Table 8 - GBN Brand Shares in Chained Cafés/Bars: % Foodservice Value 2022-2025

Table 9 - Forecast Cafés/Bars by Category: Units/Outlets 2025-2030

Table 10 - Forecast Sales in Cafés/Bars by Category: Number of Transactions 2025-2030

Table 11 - Forecast Sales in Cafés/Bars by Category: Foodservice Value 2025-2030

Table 12 - Forecast Cafés/Bars by Category: % Units/Outlets Growth 2025-2030

Table 13 - Forecast Sales in Cafés/Bars by Category: % Transaction Growth 2025-2030

Table 14 - Forecast Sales in Cafés/Bars by Category: % Foodservice Value Growth 2025-2030

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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

Portfolio rationalisation and format repositioning reshape competition

## CHANNELS

Chains consolidate value leadership as independents face pressure

Fulfilment strategies balance convenience and cost sensitivity

## MARKET DATA

Table 15 - Units, Transactions and Value Sales in Consumer Foodservice 2020-2025

Table 16 - Units, Transactions and Value Sales in Consumer Foodservice: % Growth 2020-2025

Table 17 - Consumer Foodservice by Independent vs Chained by Type: Units/Outlets 2025

Table 18 - Consumer Foodservice by Independent vs Chained: % Foodservice Value 2020-2025

Table 19 - Sales in Consumer Foodservice by Food vs Drink Split: % Foodservice Value 2020-2025

Table 20 - Sales in Consumer Foodservice by Food vs Drink Split by Type: % Foodservice Value 2025

Table 21 - Sales in Consumer Foodservice by Location: % Foodservice Value 2020-2025

Table 22 - Sales in Consumer Foodservice by Fulfilment: % Foodservice Value 2020-2025

Table 23 - GBO Company Shares in Chained Consumer Foodservice: % Foodservice Value 2021-2025

Table 24 - GBN Brand Shares in Chained Consumer Foodservice: % Foodservice Value 2022-2025

Table 25 - GBN Brand Shares in Chained Consumer Foodservice: Units/Outlets 2025

Table 26 - Forecast Units, Transactions and Value Sales in Consumer Foodservice 2025-2030

Table 27 - Forecast Units, Transactions and Value Sales in Consumer Foodservice: % Growth 2025-2030

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## SOURCES

Summary 1 - Research Sources

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