



Euromonitor
International

Cafés/Bars in the United Kingdom

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Cafés/Bars in the United Kingdom - Category analysis

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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

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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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Fulfilment strategies balance convenience and cost sensitivity

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