**A close up of a logo

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**Operator Data Highlights Fast-Food and Bakery Sector Growth Amongst Inflation Pressures**

The latest [Lumina Intelligence’s Operator Data Index](https://lumina-intelligence.com/product/operator-data-index/) reveals that the UK hospitality industry faces a slow start to 2025 following economic stagnation in late 2024. Inflation rebounded to 2.5% by year-end, exceeding the Bank of England’s 2% target, limiting interest rate cuts and tightening consumer spending. Hospitality businesses must focus on cost control, pricing strategies, and customer experience to navigate recovery.

Despite economic headwinds, the UK fast-food market grew in value by +3.5%, driven by contemporary fast-food brands, franchising, and expansion in key travel hubs. QSR challenger brands including Popeyes and Wingstop accelerated expansion, leveraging multi-format strategies and strong digital engagement to strengthen market presence.

Leading restaurant brands saw modest outlet growth in 2024, as operators focused on consolidation, restructuring, and financial stability. While Wagamama and Dishoom expanded, capitalising on strong brand equity and international opportunities, legacy chains including TGI Fridays and Pizza Hut struggled, facing closures and administration.

The report also highlights a surge in M&A activity, with private equity firms targeting high-growth brands. Notable transactions included Fortress Investment’s acquisition of Loungers and Sixth Street’s purchase of Wingstop UK’s master franchise, reflecting growing investor confidence in the sector’s long-term potential.

The coffee and sandwich market remained one of the strongest segments, with Greggs dominating and premium coffee brands including WatchHouse and Blank Street experiencing double-digit revenue gains as demand for high-quality, specialty coffee surged.

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**The Operator Data Index:**

Lumina Intelligence’s [**Operator Data Index**](https://lumina-intelligence.com/product/operator-data-index/)providescontinuous turnover and outlet data on **400+ UK pub, restaurant, QSR, sandwich and coffee shop operators**, analysing the leading and fastest growing brands through an interactive dashboard, bringing subscribers quarterly market intelligence reports.

**Report methodology**

The [Lumina Intelligence Operator Data Index](https://lumina-intelligence.com/product/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.

<https://www.lumina-intelligence.com/>