“The main difference between under-35s and their older counterparts is that they have a higher tendency to make food choices that can help the environment. This includes a willingness to eat dishes that contain meat substitutes and, whereas over-65s are more likely to be drawn to ethnic restaurants that feature seasonal British produce.”

– Trish Caddy, Senior Foodservice Analyst

This report looks at the following areas:

- Grappling with sustainability issues
- Sensory and experience: the theatre of food
- Pushing the boundaries of what authenticity means

2019 was the year of the underdog in ethnic cuisines, with restaurants specialising in lesser-known cuisines gaining popularity at the expense of Chinese and Indian establishments.

The rising cost of operating sit-down venues will be unsustainable for some ethnic restaurants in the long run. Instead of adding more restaurant sites, operators will focus on two areas: enhancing dining experiences at their flagship stores and expanding delivery catchment areas through partnerships with third-party delivery companies (e.g. Deliveroo, Just Eat).

It is important that ethnic restaurants and takeaways exercise ethical due diligence across their operations and supply chains to improve sentiment towards their brand image. Consumers are likely to prioritise food hygiene, the availability of seasonal British produce (even within ethnic dishes) and sustainable food packaging solutions when choosing an ethnic restaurant/takeaway.

DID YOU KNOW? This report is part of a series of reports, produced to provide you with a more holistic view of this market
The UK ethnic restaurants and takeaways market was worth £12.6 billion in 2019

Growth of the takeaway segment has moderated from 7.6% in 2015 to 3.4% in 2019

Companies and brands

Struggling branded chains turn to CVAs

MW Eat: slow but steady wins the race

Figure 4: Outlet numbers of selected ethnic restaurants and takeaways, 2016-19

Vegan menu trends

The rise of virtual brands

Lunchbox schemes

The consumer

Over two thirds of Britons use ethnic restaurants/takeaways

Chinese and Indian cuisines losing their grip

Figure 6: Annual changes in venues visited/ordered from, November 2018 and November 2019

Under-35s most likely to try all types of ingredients

Price is not the most important factor for all

The importance of sensory experiences

What we think

Grappling with sustainability issues

The facts

The implications

Sensory and experience: the theatre of food

The facts

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The implications
Pushing the boundaries of what authenticity means
The facts
The implications

The Market – What You Need to Know

The UK ethnic restaurants and takeaways market was worth £12.6 billion in 2019
The eat-in segment is predicted to have declined by 0.7% in 2019
Growth of the takeaway segment has moderated from 7.6% in 2015 to 3.4% in 2019

Market Size, Segmentation and Forecast

Ethnic restaurants and takeaways market driven by convenience
Figure 10: UK ethnic restaurants and takeaways market, value sales, 2014-24

Opportunities for meat-free ethnic cuisines
Figure 11: UK ethnic restaurants and takeaways market, value sales, 2014-24

Eat-in expected to stumble in 2019
Figure 12: UK ethnic eat-in restaurants market, value sales, 2014-24

Eat-in restaurants that do not innovate will struggle
Figure 13: UK ethnic eat-in restaurants market, value sales, 2014-24

The takeaway segment challenged by non-specialists
Figure 14: UK ethnic takeaway/home delivery market, value sales, 2014-24

The takeaway segment will become saturated
Figure 15: UK ethnic takeaway/home delivery market, value sales, 2014-24

Forecast methodology

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Most people don’t follow any diets...
Figure 16: Types of dietary preferences, November 2019

...but those who do are adventurous...
Figure 17: Experiences trend drivers, by dietary preferences, November 2019

...and thoughtful eaters
Figure 18: Wellbeing trend drivers, by dietary preferences, November 2019

Companies and Brands – What You Need to Know

Struggling branded chains turn to CVAs
Vegan menu trends
The rise of virtual brands
Lunchbox schemes

Market Share

Delivery spices up ethnic market
Figure 19: Number of Indian vs Chinese restaurants and takeaway outlets, 2014-19

Small but mighty Wagamama
Ethnic Restaurants and Takeaways - UK - February 2020

Competitive Strategies

- The rise of the CVA
- Dishoom invests in restaurant design
- Capturing the captive audience
- Barburrito targets airport diners
- Chopstix’s targets lunchtime and delivery
- Yo! drops the “Sushi”

Launch Activity and Innovation

- Menu trends
- Low-calorie meals
- Vegan
  - Figure 23: Vegan ‘suika’ tuna featuring dehydrated watermelon
- Ethnic retail concepts
- Ethnic spin on pubs
- Pop-ups and collaborations
  - Figure 24: a pop-up collaboration with Lap-fai Lee, Guan Chua and Sambal Shiok (Holloway Road, London)
- “Grocerant”
  - Figure 25: Examples of in-store supermarkets
- Virtual brands
- Lunchbox schemes
  - Figure 26: Example of zero waste tiffin service, by Fooska (London)

The Consumer – What You Need to Know

- 71% of Britons have eaten in/ordered takeaway from ethnic restaurants or takeaways
- Chinese and Indian cuisines losing their grip
- Under-35s most likely to try all types of ingredients
- Price is not the most important factor for all
- Sensory and experience

Overall Usage

- Over two-thirds of Britons eat ethnic cuisines out of home
  - Figure 27: Overall usage, November 2019
- More Britons order takeaways than dine in at ethnic restaurants
  - Figure 28: overall usage of ethnic eateries, November 2019
- The rise of plant-based dining

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Figure 29: Overall usage, by dietary preferences, November 2019

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Chinese and Indian cuisines losing their grip

Figure 30: Annual changes in venues visited/ordered from, November 2018-19

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Under-35s are making thoughtful food choices

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Under-45s like it hot

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Celebrate cultures through food experiences

More should offer halal options

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Charge more for overseas produce

Offer discounts for good deeds

Price is not the most important factor for all

Hygiene first

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Consider ethnic food and drink when crafting gut health narratives – CHAID Analysis

Figure 36: Ethnic restaurants and takeaways – CHAID – Tree output, November 2019

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A home away from home experience

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Figure 38: Examples of open kitchens

Play like a chef

Sharing food versus...

...set menus

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The battle between authenticity and familiarity
Buffets versus...
...traditional ethnic dishes
Fermentation takes a long time
Increase accessibility of services
One-stop shop "grocerant" experience
From breakfast on through all the day
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