

THE WAY WE LUNCH REPORT 2026

co
op

OWNED BY YOU.
RIGHT BY YOU.



Southern-Fried Chicken & Pickle Sub Roll



Irresistible Beef Burrito Wrap with Birria Dip



Irresistible Korean Chicken Sando with Gochujang Aioli



Tex Mex Style Chicken with Holy Moly® Guacamole Dip

THE HISTORY OF FOOD-TO-GO

Food-to-go is not a modern-day concept. In fact, it can be traced back to the 1800s, and our Co-op's origins with the Rochdale Pioneers. Just like today, food-to-go in the late 1800s was convenience-based, rooted in the nature of people's busy lives and often centred around working patterns.

In a similar vein as today, shoppers in the late 1800s required a 'food-for-now' offer that met the needs of long working hours, and being away from the home setting, with an inability to cook. Additionally, food-for-now was equally important due to limited safe refrigeration storage - shoppers were buying what they needed in that very moment to consume.

Co-operative food stores during this period predominantly served working class customers, who were looking for affordable and unadulterated food. Penny rolls were a staple purchase in these stores with two options: a half penny roll, which was a plain bread roll, or a full penny roll, which included cooked meat and cheese.

Meat slicers were also a firm fixture in most stores of this time, enabling shopkeepers to serve up slices of cooked meats, such as boiled tongue, ham or bacon. Meat would be sliced in-store to serve, and to make the penny rolls that would then be wrapped in paper and handed over to the customer.

Even in the late 1800s, Co-operative stores demonstrated their commitment to fairness by ensuring customers paid only for the weight of the product itself rather than including packaging costs, unlike many other grocers. This principle of 'doing right by the customer' continues to be central to Co-op's Values today.



TODAY'S FOOD-TO-GO WHERE ARE WE AT IN 2026?

The total food-to-go category is forecast to reach £27 billion by 2029 (IGD - The Institute of Grocery Distribution) and in retail grocery alone it has reached £4.8 billion over the past 12 months (Circana data read 52 weeks to 28 March 2026).

This growth is primarily driven by the resurgence of office working, plus increased sales at airports and train stations. IGD data has also shown that the growth in this market has come from a shift in consumer attitudes, with more people viewing food-to-go as 'a moment of enjoyment' rather than just a quick and convenient meal.

Convenience stores, petrol forecourts, coffee shops and sandwich and bakery specialists are at the forefront of this expansion, alongside ever-popular fast-food restaurants. There is a notable trend towards premiumisation and demand for healthier, functional options as consumers look for ways to elevate lunchtime experiences (Lumina Intelligence UK Food-To-Go Market Report).

Food-to-go eating habits are shifting back into work based and commuting routines. Transport and walking occasions have reduced slightly, while workplace eating has grown as hybrid patterns drive more grab-and-go purchases.

Park and other seated outdoor occasions remain stable, showing continued demand for flexible food-to-go options across daily routines.

Flexible working patterns are shifting retail footfall. Tuesday, Wednesday and Thursday see the most traffic to food grocers for food-to-go, aligning with peak hybrid office days. In Q1 2025, ONS data showed 13% work solely from home and 28% have a hybrid schedule.



13%

WORK SOLELY FROM HOME

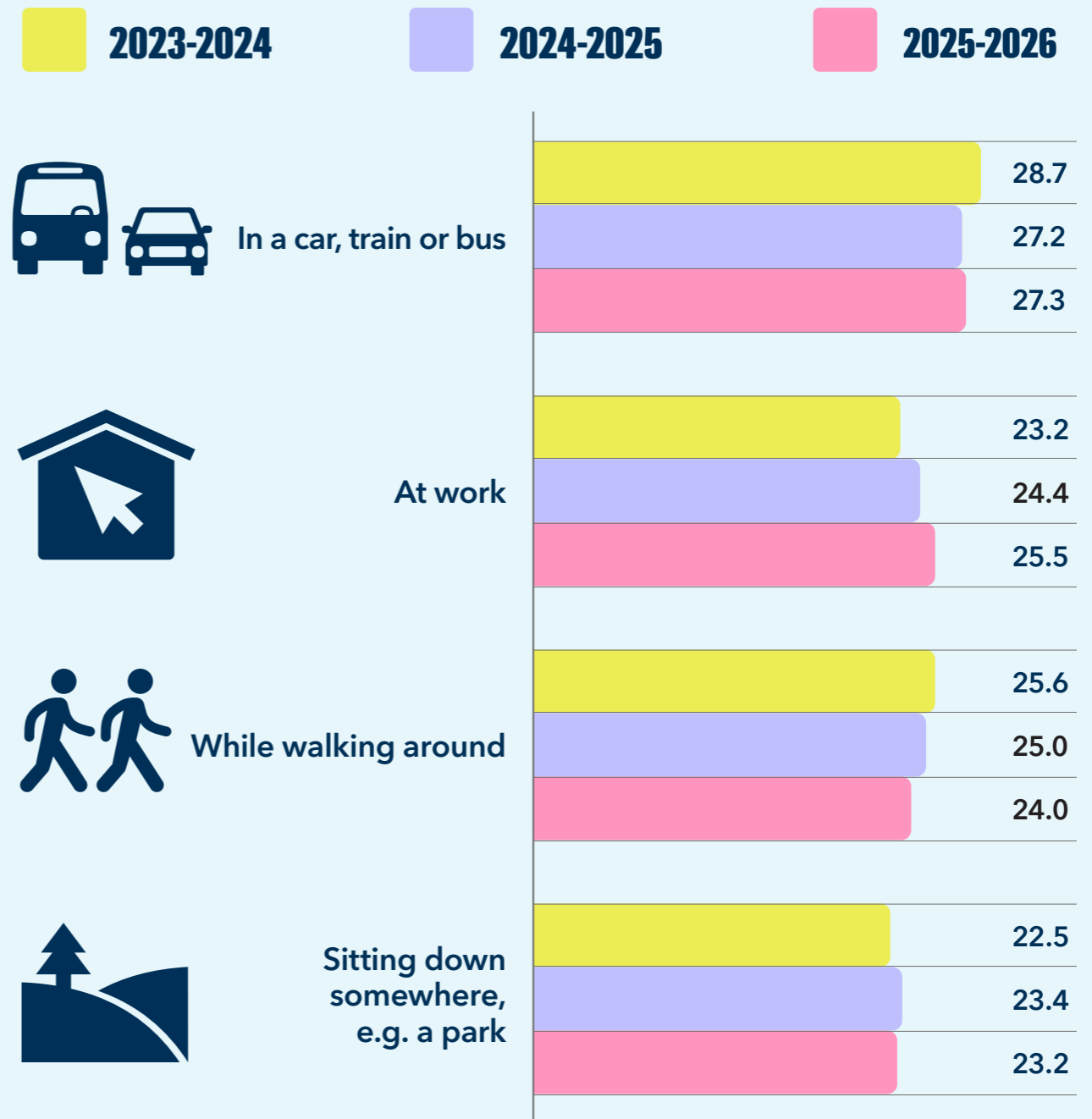


28%

HAVE A HYBRID SCHEDULE



WHERE DO PEOPLE CONSUME THEIR FOOD 'ON THE GO'?

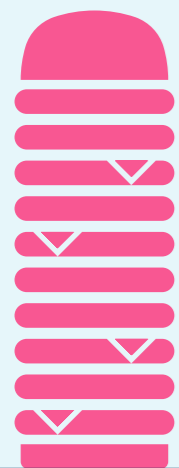


Source: Lumina Intelligence Eating and Drinking Out Panel, data collected 52WE 21.01.24, 52WE 19.01.25, 52 WE 18.01.26 2=Qn33, n=13,772, 14,424, 14,576.

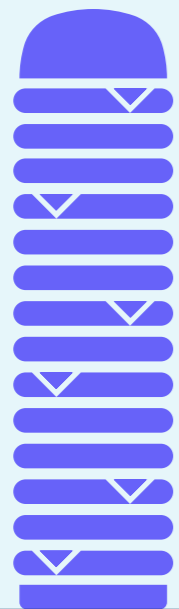
CONSUMERS PRIORITISE VALUE FOR MONEY, LOCATION AND QUALITY WHEN MAKING DECISIONS ABOUT ON-THE-GO FOOD AND DRINK PURCHASES

Main factors (top 3) member shoppers consider when choosing where to go for food/drinks on the go.

48%
LOCATION



56%
VALUE FOR MONEY



46%
QUALITY



"I need to get something quickly, so **location** is vital."

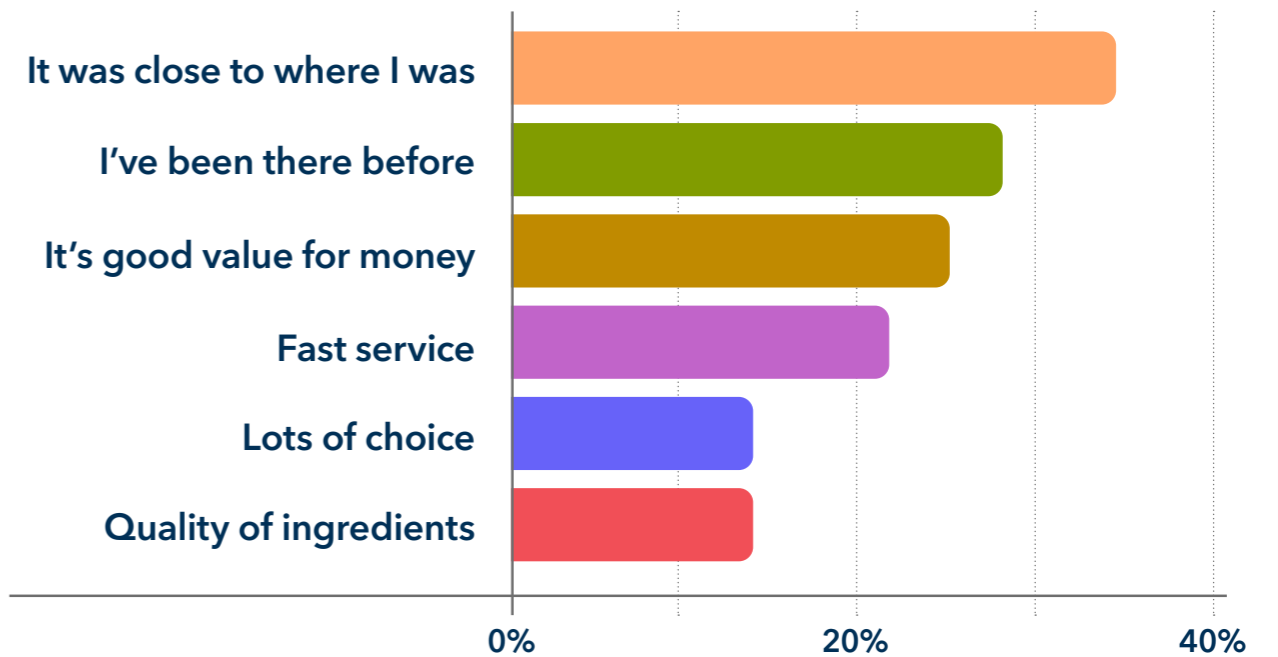
"**Good value** is essential, that doesn't mean I choose the cheapest product."

"**Tasty, high-quality** items made with quality ingredients"



Low price is an important consideration (21%) but shoppers prioritise **quality and value** over simply finding the cheapest option.

LOCATION, VALUES AND QUALITY ALSO INFORM OUTLET CHOICE FOR ALL FOOD-TO-GO SHOPPERS. HOWEVER, FAST SERVICE AND CHOICE COME THROUGH AS A BIGGER FACTOR HERE.



FOOD-TO-GO - WHEREVER YOU NEED IT.

Co-op's food-to-go ranges are available in thousands of stores across the UK.

WHAT'S ON THE MENU?

Co-op's TOP TEN food-to-go 'MAINS' sold in 2025

No.1 CO-OP CHICKEN AND BACON SANDWICH

- No. 2: Co-op Chicken and Bacon Caesar Wrap
- No. 3: Co-op Ham and Cheese Sandwich
- No. 4: Co-op Southern-Fried Chicken Wrap
- No. 5: Co-op All Day Breakfast Sandwich
- No. 6: Co-op Bacon Lettuce and Tomato Sandwich
- No. 7: Co-op Chicken Salad Sandwich
- No. 8: Co-op Chicken and Stuffing Sandwich
- No. 9: Co-op Prawn Mayonnaise Sandwich
- No. 10: Co-op Tuna and Sweetcorn Sandwich

Co-op's TOP TEN food-to-go 'SNACKS' sold in 2025

No.1 CO-OP BRITISH CHICKEN SATAY WITH SWEET CHILLI DIP

- No. 2: Fridge Raiders Slow Roast Chicken Bites
- No. 3: Co-op British Chicken Poppers
- No. 4: Ginsters Peppered Steak Slice
- No. 5: Ginsters Original Cornish Pasty
- No. 6: Ginsters Large Sausage Roll
- No. 7: Co-op Free-Range Hard-Boiled Eggs
- No. 9: Co-op Apple and Grape Pot
- No. 9: Co-op Treat Millionaire's Shortbread
- No. 10: Co-op Free-Range Scotch Egg

Co-op's TOP TEN food-to-go 'PREMIUM MAINS' sold in 2025

No.1 CO-OP IRRESISTIBLE NEW YORK DELI SANDWICH

- No. 2: Co-op Irresistible Aberdeen Angus Steak Sandwich
- No. 3: Co-op Irresistible Margherita Inspired Pizza Wrap
- No. 4: Co-op Irresistible Steak and Balsamic Onion Sandwich
- No. 5: Co-op Irresistible Hot Honey Ham Hock Sandwich
- No. 6: Co-op Global Menu American Cheeseburger Wrap
- No. 7: Co-op Irresistible Chicken and Ibérico Sandwich
- No. 8: Co-op Global Menu Indian Gunpowder Chicken Wrap
- No. 9: Co-op Irresistible Chipotle Chicken Caesar Salad
- No. 10: Co-op Global Chinese Salt and Pepper Chicken Wrap

Co-op's TOP TEN food-to-go 'DRINKS' sold in 2025

No.1 RED BULL ENERGY DRINK

- No. 2: Coca-Cola
- No. 3: Oasis Summer Fruits
- No. 4: Lucozade Energy Orange
- No. 5: Lucozade Sport Orange
- No. 6: Diet Coke
- No. 7: Dr Pepper
- No. 8: Lucozade Sport Raspberry
- No. 9: Coca-Cola Zero
- No. 10: Monster Energy Ultra



“CO-OP’S MEAL DEAL HAS OVER 15 MILLION DIFFERENT COMBINATIONS”

The nation’s love affair with the lunchtime meal deal shows no signs of slowing, with sales increasing year-on-year. At Co-op, deals purchased in our stores jumped from 48 million in 2023 to 56 million in 2024 - a 17% rise in just 12 months - before climbing again to over 62 million in 2025, up a further 10% year-on-year. In total, that’s a nearly 30% increase in just two years.



Co-op’s TOP TEN food-to-go ‘MEAL DEALS’ sold in 2025-2026

No.1 CO-OP CHICKEN AND BACON SANDWICH, CO-OP BRITISH CHICKEN SATAY WITH SWEET CHILLI DIP, RED BULL ENERGY DRINK

No. 2: Co-op All Day Breakfast, Ginsters Peppered Steak Slice, Red Bull Energy Drink

No. 3: Co-op Chicken and Bacon Caesar Wrap, Co-op British Chicken Satay Snacks with Sweet Chilli Dip, Red Bull Energy Drink

No. 4: Co-op Chicken and Bacon Sandwich, Ginsters Large Sausage Roll, Red Bull Energy Drink

No. 5: Co-op Chicken and Bacon Sandwich, Ginsters Peppered Steak Slice, Red Bull Energy Drink

No. 6: Co-op Chicken and Bacon Sandwich, McCoy’s Flame Grilled Steak crisps, Coca-Cola

No. 7: Co-op Chicken and Bacon Sandwich, BBQ Beef Hula Hoops, Coca-Cola

No. 8: Co-op All Day Breakfast, Ginsters Large Sausage Roll, Red Bull Energy Drink

No. 9: Co-op Chicken and Bacon Caesar Wrap, Ginsters Peppered Steak Slice, Red Bull Energy Drink

No. 10: Co-op Chicken and Bacon Sandwich, BBQ Beef Hula Hoops, Red Bull Energy Drink

FOOD-TO-GO GOES ‘GLOBAL’



Global flavours are driving new product development trends in 2026, with innovative launches drawing inspiration from a variety of popular cuisines across the world to attract shoppers. At Co-op we have introduced eight global cuisine inspired mains to our latest summer range - including trend-based flavour profiles, such as pickle and gochujang aioli - and launched new iterations of our popular wrap and dip format.



MAKING LUNCHTIME PREMIUM



Research suggests that premium meal deals are becoming more popular as consumers are redefining value for money around quality, with 71% of consumers stating they prioritise quality over simply finding the cheapest option (Lumina Intelligence UK Food-To-Go Market Report).

Additionally, the data shows that food-to-go is shifting from just being hurried convenience and is increasingly being treated as a moment of enjoyment. Premium meal deals offer shoppers a change from traditional sandwich options - with delicatessen-style breads, such as focaccia, and more restaurant-led food trend inspirations - making lunchtime feel more of an elevated moment of enjoyment.

We introduced our Co-op premium meal deal in 2023, enabling our shoppers to customise their lunchtime meal deal with an expanded range of deluxe main choices. These new mains emphasise trend-driven flavour profiles and

incorporate premium ingredients that are new to the food-to-go aisle. Impressively, since launch, sales for our Co-op's premium meal deal have increased by over 200%, based on 2025 sales figures.

Our sales data shows that Thursday is the most popular day for shoppers to trade up to a premium meal deal, since many hybrid workers work from home on a Friday. Thursday has now become the last day of the week in the office - it's become the pre-pandemic Friday of the working week. Treating yourself to a more premium meal deal on a Thursday suggests people are looking to treat themselves as the weekend approaches.

WHAT LOCATION?

TOP TEN regions purchasing Premium Meal Deals

No.1 GREATER LONDON

No. 2: Greater Manchester

No. 3: Kent

No. 4: West Yorkshire

No. 5: Cheshire

No. 6: Devon

No. 7: Lancashire

No. 8: North Yorkshire

No. 9: East Sussex

No.10: Surrey

TOP TEN Co-op stores selling the most Premium Meal Deals

No.1 MEDIA CITY, SALFORD

No. 2: Oxford Road, Manchester

No. 3: Corporation Street, Manchester

No. 4: Whiteknights Campus, Reading

No. 5: Angel Square, Manchester

No. 6: Clippers Quay, Salford

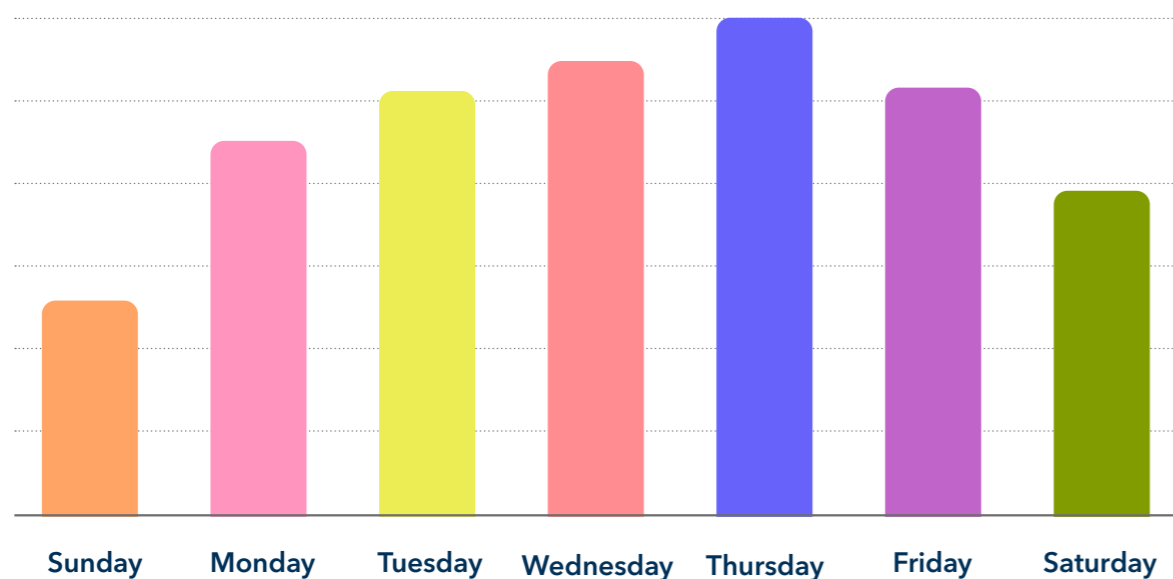
No. 7: Chiswick High Road, London

No. 8: Station Street, Nottingham

No. 9: Capital Quarter, Cardiff

No.10: Clarkson Street, Sheffield

AVERAGE PREMIUM MEAL DEAL REDEMPTIONS BY DAY OF WEEK



FOOD-TO-GO THAT SUPPORTS BRITISH FARMERS



Co op is proud of our long standing support for farmers with our British protein commitment. All the meat and poultry in our food-to-go products - including all our sandwiches, wraps and salads - is **100% British**. This commitment gives our members and shoppers confidence in where their food comes from and how it's produced.

By choosing British meat and poultry, Co op helps support UK farmers with long term partnerships that provide stability, fairness and investment in high animal welfare and sustainable farming. It's a commitment that means shoppers can feel good knowing their everyday choices are helping to back British farming, support rural communities and keep quality, responsibly sourced food on shelves in thousands of stores across the country.





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