



Full-Service Restaurants in the United Kingdom

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Full-Service Restaurants in the United Kingdom - Category analysis

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2025 DEVELOPMENTS

Chain-backed resilience keeps growth intact

INDUSTRY PERFORMANCE

Fullservice restaurants maintain growth amid cost pressures

Dynamic growth led by experiential Middle Eastern and indulgent North American formats

Leading chains elevate consumer experiences through innovation

WHAT'S NEXT?

Higher spend per visit will drive future value growth

The evolution of fulfilment

Sustainability, technology and loyalty shape the future of fullservice dining

COMPETITIVE LANDSCAPE

Restaurant Group Plc holds highest value share in full-service restaurants in 2025

Tinseltown rises through experiential dining and scalable expansion

Independents lead full-service restaurants through scale and local relevance

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[Consumer Foodservice in the United Kingdom - Industry Overview](#)

EXECUTIVE SUMMARY

Chains lead value growth through price rises and convenience offer

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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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