



Euromonitor
International

Full-Service Restaurants in Ireland

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KEY DATA FINDINGS

2025 DEVELOPMENTS

Rising demand for fine dining and authentic global cuisines

INDUSTRY PERFORMANCE

Value growth supported by rising consumer interest in fine dining and authentic global cuisines
Wagamama and new full-service formats anchor Asian and experiential dining growth in 2025
Value for money and rising price sensitivity influence dining decisions as cost concerns grow in 2025

WHAT'S NEXT?

Value sales set to rise as premium and experiential dining demand strengthens
Fulfilment to evolve through hybrid dine-in, takeaway and chef-driven digital experiences
Sustainability, provenance, local sourcing and menu transparency increasingly shape full-service dining value

COMPETITIVE LANDSCAPE

FXB leads through premium local quality and heritage dining
Wagamama's comeback make it the most dynamic full-service brand, while TGI Fridays contracts
Independent restaurants retain their lead, offering authenticity and diversity

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Consumer Foodservice in Ireland - Industry Overview

EXECUTIVE SUMMARY

Growth supported by digital convenience, sustainability, and evolving consumer priorities

KEY DATA FINDINGS

INDUSTRY PERFORMANCE

Inflation drives price sensitivity, shifting demand toward affordable foodservice formats
Digital ordering and delivery surge as consumers prioritise convenience and speed
Personalised experiences and loyalty programmes gain importance amid rising competition

WHAT'S NEXT?

Tourism recovery and tech adoption to fuel growth despite cost pressures
Automation and hybrid formats emerge as key strategies to tackle rising costs

Eco-friendly practices and ethical sourcing essential for long-term competitiveness

COMPETITIVE LANDSCAPE

Affordable menus and digital engagement secure McDonald's leadership

Tech-driven delivery and rapid expansion propel Apache Pizza as Ireland's fastest-growing brand

Chains and independents innovate with health-focused menus and sustainability-led store formats

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Digital tools and eco-friendly practices redefine innovation

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