



Consumer Foodservice in the United Arab Emirates

March 2026

Consumer Foodservice in the United Arab Emirates

EXECUTIVE SUMMARY

Competitors show resilience in a challenging landscape

KEY DATA FINDINGS

INDUSTRY PERFORMANCE

Foodservice operators balance cost pressures and affordability

Delivery and takeaway reshape fulfilment economics

Customer loyalty and experience shapes consumer engagement

WHAT'S NEXT?

Sales of consumer foodservice expected to rise steadily over the forecast period

Innovation shifts towards experience, personalisation and operational precision

Sustainability gains relevance as a differentiation lever

COMPETITIVE LANDSCAPE

Americana Group ranks as the leading company in UAE consumer foodservice

Al Baik emerged as the most dynamic company in 2025, followed by Pizza Hut and Nando's

Competition and selective expansion shape brand developments

CHANNELS

Chained operators outperform in terms of growth consistency and resilience

Innovation focuses on fulfilment, localisation and operational efficiency

MARKET DATA

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Cafés/Bars in the United Arab Emirates

KEY DATA FINDINGS

2025 DEVELOPMENTS

Category performance driven by café culture

INDUSTRY PERFORMANCE

Cafés/bars gain momentum from socialisation and flexible lifestyles

Juice and smoothie chains record dynamic growth in 2025
Chained coffee and tea specialists balance value and premiumisation

WHAT'S NEXT?

Cafés to evolve into multi-purpose lifestyle spaces driving growth
Coffee-based cafés shift towards delivery, takeaway and drive-thru
Wellness-led menu innovation drives juice bars

COMPETITIVE LANDSCAPE

Starbucks maintains value share amid market stabilisation
FiLLi gains momentum through localised café positioning
Independents dominate value as chains capture key occasions

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[Full-Service Restaurants in the United Arab Emirates](#)

KEY DATA FINDINGS

2025 DEVELOPMENTS

Strategic efforts attract consumers in difficult climate

INDUSTRY PERFORMANCE

Full-service restaurants record moderate value growth in 2025
Asian full-service restaurants emerged as the most dynamic category in 2025
Consumers balance dine-in experiences with the convenience of delivery

WHAT'S NEXT?

Full-service restaurant value sales are expected to grow steadily over the forecast period
Operators to increasingly adopt hybrid approach to fulfillment
Sustainability-led positioning gains relevance as a point of differentiation

COMPETITIVE LANDSCAPE

Americana Group remains leading player in value share terms
Nando's emerges as most dynamic company in 2025
Independent full-service restaurants continued to dominate value sales

CATEGORY DATA

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Limited-Service Restaurants in the United Arab Emirates

KEY DATA FINDINGS

2025 DEVELOPMENTS

Limited-service restaurants register resilient performance

INDUSTRY PERFORMANCE

Sustained growth amid localisation

Chained burger and chicken restaurants drive value growth

Value-led offers resonate with price-conscious consumers

WHAT'S NEXT?

Tourism and busy lifestyles to drive long-term growth

Delivery to outpace eat-in growth in UAE

Personalisation, experience and health-focused innovation

COMPETITIVE LANDSCAPE

Value-led global chains compete with regional and local disruptors

KFC leads by value as regional and local challengers gain momentum

Fragmentation and scale shape limited-service restaurants in the UAE

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Self-Service Cafeterias in the United Arab Emirates

KEY DATA FINDINGS

2025 DEVELOPMENTS

Declining sales in this niche foodservice channel

INDUSTRY PERFORMANCE

Self-service cafeterias face challenges and limitations

Ikea Restaurant dominates this niche channel

Value-for-money underpins IKEA Restaurant's positioning

WHAT'S NEXT?

Self-service cafeterias to remain structurally niche, except Vapiano

Structural constraints reinforce eat-in dominance

Value-led positioning shifts focus from innovation to sustainability

COMPETITIVE LANDSCAPE

Ikea Restaurant remains dominant but lacks momentum

IKEA Restaurant shows resilience amidst competition from broader market

Brand trust and standardisation favours chained operators

CATEGORY DATA

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Street Stalls/Kiosks in the United Arab Emirates

KEY DATA FINDINGS

2025 DEVELOPMENTS

Subtle growth in street stalls/kiosks

INDUSTRY PERFORMANCE

Impulse snacking when on-the-go sustains street stalls/kiosks

Health-related demand drives growth of Mr Sugarcane UAE

Street stalls and kiosks defined by immediacy and affordability

WHAT'S NEXT?

Independent street stalls lose ground to chained kiosk concepts
Takeaway reigns dominant as delivery remains selective in kiosks
Moderated indulgence and health cues reshape kiosk demand

COMPETITIVE LANDSCAPE

Market leadership is concentrated among Mr Sugarcane Juice
Health positioning fuels Mr Sugarcane Juice
Independent operators lead as location quality gains importance

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[Consumer Foodservice By Location in the United Arab Emirates](#)

KEY DATA FINDINGS

2025 DEVELOPMENTS

Retail malls attract high volume of foodservice growth

INDUSTRY PERFORMANCE

Mall-based retail anchors foodservice growth
High-street standalone outlets support growth in the UAE
Fulfilment shifts towards convenience-led value in retail locations

WHAT'S NEXT?

Retail is set to remain the most dynamic non-standalone location
Standalone locations to grow, but challenges persist
UAE demographics continue to shape location performance

COMPETITIVE LANDSCAPE

High-footfall retail locations underpin KFC's non-standalone dominance
McDonald's outperforms in standalone formats through scale and convenience
Third-party apps will limit growth of first-party apps

CATEGORY DATA

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