



# Limited-Service Restaurants in the US

March 2026

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## Limited-Service Restaurants in the US - Category analysis

### KEY DATA FINDINGS

#### 2025 DEVELOPMENTS

Value and convenience drive growth amid pricing pressures

#### INDUSTRY PERFORMANCE

Limited-service growth continues apace as convenience and value take centre stage

Chained Middle Eastern limited-service restaurants sees the strongest growth

Fulfilment in the US continues to favour convenience

#### WHAT'S NEXT?

Limited-service restaurants set to see significant growth over the forecast period

Fulfilment channels to become less discrete as formats evolve

Innovation will stand out as an important tool to combat price and labour disruptions

#### COMPETITIVE LANDSCAPE

McDonald's returns to its Monopoly roots

Blaze Pizza sees strong growth as it slices through the competition

Chained limited-service restaurants holds the lion's share of sales

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

### EXECUTIVE SUMMARY

Macroeconomic and policy disruptions reshape consumer foodservice

### KEY DATA FINDINGS

#### INDUSTRY PERFORMANCE

Navigating operational volatility and the premiumisation of value

Brands adapt to capture value-conscious diners demanding convenience

Loyalty programmes and experiences connect with customers in a price-sensitive world

#### WHAT'S NEXT?

Challenges abound, but US consumers still love to eat

The legacy of GLP-1

Sustainability and health policy shifts

## COMPETITIVE LANDSCAPE

The golden arches remain important in consumer foodservice in the US  
Dutch Bros continues to see the winds blow in its favour  
K-Brands and beyond continue to push experiential dining in the US market

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