



Euromonitor
International

Limited-Service Restaurants in the United Arab Emirates

March 2026

Limited-Service Restaurants in the United Arab Emirates - Category analysis

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

CATEGORY DATA

Table 1 - Limited-Service Restaurants by Category: Units/Outlets 2020-2025

Table 2 - Sales in Limited-Service Restaurants by Category: Number of Transactions 2020-2025

Table 3 - Sales in Limited-Service Restaurants by Category: Foodservice Value 2020-2025

Table 4 - Limited-Service Restaurants by Category: % Units/Outlets Growth 2020-2025

Table 5 - Sales in Limited-Service Restaurants by Category: % Transaction Growth 2020-2025

Table 6 - Sales in Limited-Service Restaurants by Category: % Foodservice Value Growth 2020-2025

Table 7 - GBO Company Shares in Chained Limited-Service Restaurants: % Foodservice Value 2021-2025

Table 8 - GBN Brand Shares in Chained Limited-Service Restaurants: % Foodservice Value 2022-2025

Table 9 - Forecast Limited-Service Restaurants by Category: Units/Outlets 2025-2030

Table 10 - Forecast Sales in Limited-Service Restaurants by Category: Number of Transactions 2025-2030

Table 11 - Forecast Sales in Limited-Service Restaurants by Category: Foodservice Value 2025-2030

Table 12 - Forecast Limited-Service Restaurants by Category: % Units/Outlets Growth 2025-2030

Table 13 - Forecast Sales in Limited-Service Restaurants by Category: % Transaction Growth 2025-2030

Table 14 - Forecast Sales in Limited-Service Restaurants by Category: % Foodservice Value Growth 2025-2030

DISCLAIMER

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

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

Table 15 - Units, Transactions and Value Sales in Consumer Foodservice 2020-2025

Table 16 - Units, Transactions and Value Sales in Consumer Foodservice: % Growth 2020-2025

Table 17 - Consumer Foodservice by Independent vs Chained by Type: Units/Outlets 2025

Table 18 - Consumer Foodservice by Independent vs Chained: % Foodservice Value 2020-2025

Table 19 - Sales in Consumer Foodservice by Food vs Drink Split: % Foodservice Value 2020-2025

Table 20 - Sales in Consumer Foodservice by Food vs Drink Split by Type: % Foodservice Value 2025

Table 21 - Sales in Consumer Foodservice by Location: % Foodservice Value 2020-2025

Table 22 - Sales in Consumer Foodservice by Fulfillment: % Foodservice Value 2020-2025

Table 23 - GBO Company Shares in Chained Consumer Foodservice: % Foodservice Value 2021-2025

Table 24 - GBN Brand Shares in Chained Consumer Foodservice: % Foodservice Value 2022-2025

Table 25 - GBN Brand Shares in Chained Consumer Foodservice: Units/Outlets 2025

Table 26 - Forecast Units, Transactions and Value Sales in Consumer Foodservice 2025-2030

Table 27 - Forecast Units, Transactions and Value Sales in Consumer Foodservice: % Growth 2025-2030

DISCLAIMER

SOURCES

Summary 1 - Research Sources

About Euromonitor International

Euromonitor International is an independent market intelligence provider. Data, insight and analysis stem from in-the-field research spanning 210 national markets.

Content ranges from the in-depth and country-specific, to key strategic themes with a global range and significance. Products cover a comprehensive range of insights and market data, but can be broadly categorised as:

- **Strategy Briefings:** Global or regional in scope, and focussing on the most important themes shaping consumer demand, the key markets, competitive environment and future outlook across a range of industries.
- **Company Profiles:** Analysis dedicated to the world's most significant companies, with detailed insight into their activities, focus of operations, their competitors, their geographic presence and performance.
- **Country Reports:** For an in-depth understanding of specific countries, whether by industry, economic metrics or consumer trends and lifestyles. These reports cover current trends, consumer demand, market potential and future prospects, with country-specific local insight and comprehensive data, unavailable elsewhere.

For more information on this report, further enquiries can be directed via this link www.euromonitor.com/limited-service-restaurants-in-the-united-arab-emirates/report.