Euromonitor International

# Limited-Service Restaurants in the United Kingdom

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## Limited-Service Restaurants in the United Kingdom - Category analysis

### KEY DATA FINDINGS

### 2025 DEVELOPMENTS

Chain scale widens the performance gap in UK limited-service restaurants

### INDUSTRY PERFORMANCE

Scale and strategic investment drive chains ahead of independents

Latin American and Asian cuisines emerge as cuisine-led growth engines

Consumers balance convenience and cost through fulfilment choices

### WHAT'S NEXT?

Chained operators and both emerging and established formats set to sustain growth

Operators will increasingly rebalance fulfilment channels to match distinct consumption occasions

Expansion through sustainability and tech innovation

### COMPETITIVE LANDSCAPE

Competitive leadership reflected throughput and format efficiency, not footprint alone

Challenger brands outpace incumbents, while some established players retrench

Chained operators lead value sales despite independents dominating outlet numbers

### 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

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## Consumer Foodservice in the United Kingdom - Industry Overview

### EXECUTIVE SUMMARY

Chains lead value growth through price rises and convenience offer

### KEY DATA FINDINGS

### 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

Portfolio rationalisation and format repositioning reshape competition

## CHANNELS

Chains consolidate value leadership as independents face pressure

Fulfilment strategies balance convenience and cost sensitivity

## MARKET DATA



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## SOURCES





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