



**Euromonitor  
International**

# Restaurant Brands International in Consumer Foodservice

August 2025

## INTRODUCTION

Executive summary

## STATE OF PLAY

Top companies at a glance

RBI's global footprint

North America dominates RBI's revenues

RBI remodelling its restaurants

The US market takes a clear lead in foodservice per capita spending

Some 90% of fibre-based packaging from recycled or certified sources

## EXPOSURE TO FUTURE GROWTH

North America will lead new growth for RBI in the coming years

Little change expected in the foodservice top 10 rankings

## COMPETITIVE POSITIONING

Consumer foodservice remains a fragmented industry, particularly in outlet terms

McDonald's and Yum! Brands remain RBI's key competitors

Key categories and markets

Key brands

## LIMITED-SERVICE RESTAURANTS

North America remains RBI's leading region for LSR sales

Significant shares for chicken LSR in the US, Canada and Turkey

US will dominate new sales over 2024-2027

## CAFÉS/BARS

North America dominates RBI's sales in cafés/bars

Tim Hortons continues expanding in China

## KEY FINDINGS

Key findings

## APPENDIX

Projected company sales: FAQs (1)

Projected company sales: FAQs (2)

## About Euromonitor International

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