



Euromonitor
International

Full-Service Restaurants in the United Kingdom

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KEY DATA FINDINGS

2025 DEVELOPMENTS

Chain-backed resilience keeps growth intact

INDUSTRY PERFORMANCE

Fullservice restaurants maintain growth amid cost pressures
Dynamic growth led by experiential Middle Eastern and indulgent North American formats
Leading chains elevate consumer experiences through innovation

WHAT'S NEXT?

Higher spend per visit will drive future value growth
The evolution of fulfilment
Sustainability, technology and loyalty shape the future of fullservice dining

COMPETITIVE LANDSCAPE

Restaurant Group Plc holds highest value share in full-service restaurants in 2025
Tinseltown rises through experiential dining and scalable expansion
Independents lead full-service restaurants through scale and local relevance

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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

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Chains consolidate value leadership as independents face pressure

Fulfilment strategies balance convenience and cost sensitivity

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