



Euromonitor
International

Full-Service Restaurants in the United Arab Emirates

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KEY DATA FINDINGS

2025 DEVELOPMENTS

Strategic efforts attract consumers in difficult climate

INDUSTRY PERFORMANCE

Full-service restaurants record moderate value growth in 2025

Asian full-service restaurants emerged as the most dynamic category in 2025

Consumers balance dine-in experiences with the convenience of delivery

WHAT'S NEXT?

Full-service restaurant value sales are expected to grow steadily over the forecast period

Operators to increasingly adopt hybrid approach to fulfillment

Sustainability-led positioning gains relevance as a point of differentiation

COMPETITIVE LANDSCAPE

Americana Group remains leading player in value share terms

Nando's emerges as most dynamic company in 2025

Independent full-service restaurants continued to dominate value sales

CATEGORY DATA

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

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

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

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

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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 fulfillment 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

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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

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