



Consumer Foodservice By Location in the United Arab Emirates

March 2026

KEY DATA FINDINGS

2025 DEVELOPMENTS

Retail malls attract high volume of foodservice growth

INDUSTRY PERFORMANCE

Mall-based retail anchors foodservice growth

High-street standalone outlets support growth in the UAE

Fulfilment shifts towards convenience-led value in retail locations

WHAT'S NEXT?

Retail is set to remain the most dynamic non-standalone location

Standalone locations to grow, but challenges persist

UAE demographics continue to shape location performance

COMPETITIVE LANDSCAPE

High-footfall retail locations underpin KFC's non-standalone dominance

McDonald's outperforms in standalone formats through scale and convenience

Third-party apps will limit growth of first-party apps

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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

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