



Euromonitor
International

Limited-Service Restaurants in Ireland

March 2026

Table of Contents

KEY DATA FINDINGS

2025 DEVELOPMENTS

Limited-service restaurants remain resilient despite cost pressures

INDUSTRY PERFORMANCE

Growth supported by new formats and brands entering Ireland in 2025
Burger limited-service restaurants benefit from Wendy’s entry
Fulfilment and value trade-offs shape performance in a high-cost environment

WHAT’S NEXT?

Value-led formats support steady growth despite continued consumer caution amid high living costs
Fulfilment to evolve through digital ordering, drive-through and hybrid formats as cost pressures persist
McDonald’s operational changes signal sustainability becoming standard

COMPETITIVE LANDSCAPE

McDonald’s leads by anchoring demand across core categories
Apache Pizza and Circle K are the most dynamic companies in 2025
Chained foodservice operators maintain a clear competitive advantage in terms of coverage and growth pace

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

DISCLAIMER

Consumer Foodservice in Ireland - Industry Overview

EXECUTIVE SUMMARY

Growth supported by digital convenience, sustainability, and evolving consumer priorities

KEY DATA FINDINGS

INDUSTRY PERFORMANCE

Inflation drives price sensitivity, shifting demand toward affordable foodservice formats
Digital ordering and delivery surge as consumers prioritise convenience and speed
Personalised experiences and loyalty programmes gain importance amid rising competition

WHAT’S NEXT?

Tourism recovery and tech adoption to fuel growth despite cost pressures
Automation and hybrid formats emerge as key strategies to tackle rising costs

Eco-friendly practices and ethical sourcing essential for long-term competitiveness

COMPETITIVE LANDSCAPE

Affordable menus and digital engagement secure McDonald's leadership

Tech-driven delivery and rapid expansion propel Apache Pizza as Ireland's fastest-growing brand

Chains and independents innovate with health-focused menus and sustainability-led store formats

CHANNELS

Chains thrive on tech and scale, while independents battle cost and delivery challenges

Digital tools and eco-friendly practices redefine innovation

MARKET DATA

Table 15 - Units, Transactions and Value Sales in Consumer Foodservice 2020-2025

Table 16 - Units, Transactions and Value Sales in Consumer Foodservice: % Growth 2020-2025

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

Table 19 - Sales in Consumer Foodservice by Food vs Drink Split: % Foodservice Value 2020-2025

Table 20 - Sales in Consumer Foodservice by Food vs Drink Split by Type: % Foodservice Value 2025

Table 21 - Sales in Consumer Foodservice by Location: % Foodservice Value 2020-2025

Table 22 - Sales in Consumer Foodservice by Fulfilment: % Foodservice Value 2020-2025

Table 23 - GBO Company Shares in Chained Consumer Foodservice: % Foodservice Value 2021-2025

Table 24 - GBN Brand Shares in Chained Consumer Foodservice: % Foodservice Value 2022-2025

Table 25 - GBN Brand Shares in Chained Consumer Foodservice: Units/Outlets 2025

Table 26 - Forecast Units, Transactions and Value Sales in Consumer Foodservice 2025-2030

Table 27 - Forecast Units, Transactions and Value Sales in Consumer Foodservice: % Growth 2025-2030

DISCLAIMER

SOURCES

Summary 1 - Research Sources

About Euromonitor International

Euromonitor International is an independent market intelligence provider. Data, insight and analysis stem from in-the-field research spanning 210 national markets.

Content ranges from the in-depth and country-specific, to key strategic themes with a global range and significance. Products cover a comprehensive range of insights and market data, but can be broadly categorised as:

- **Strategy Briefings:** Global or regional in scope, and focussing on the most important themes shaping consumer demand, the key markets, competitive environment and future outlook across a range of industries.
- **Company Profiles:** Analysis dedicated to the world's most significant companies, with detailed insight into their activities, focus of operations, their competitors, their geographic presence and performance.
- **Country Reports:** For an in-depth understanding of specific countries, whether by industry, economic metrics or consumer trends and lifestyles. These reports cover current trends, consumer demand, market potential and future prospects, with country-specific local insight and comprehensive data, unavailable elsewhere.

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