



Euromonitor
International

Limited-Service Restaurants in the United Arab Emirates

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KEY DATA FINDINGS

2025 DEVELOPMENTS

Limited-service restaurants register resilient performance

INDUSTRY PERFORMANCE

- Sustained growth amid localisation
- Chained burger and chicken restaurants drive value growth
- Value-led offers resonate with price-conscious consumers

WHAT'S NEXT?

- Tourism and busy lifestyles to drive long-term growth
- Delivery to outpace eat-in growth in UAE
- Personalisation, experience and health-focused innovation

COMPETITIVE LANDSCAPE

- Value-led global chains compete with regional and local disruptors
- KFC leads by value as regional and local challengers gain momentum
- Fragmentation and scale shape limited-service restaurants in the UAE

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
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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 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

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 Fulfillment: % Foodservice Value 2020-2025

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

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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

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SOURCES

Summary 1 - Research Sources

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