Euromonitor International

Full-Service Restaurants in the United Arab Emirates

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Full-Service Restaurants in the United Arab Emirates - Category analysis

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
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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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