Euromonitor International

Limited-Service Restaurants in the Philippines

March 2026

Table of Contents

Limited-Service Restaurants in the Philippines - Category analysis

KEY DATA FINDINGS

2025 DEVELOPMENTS

Limited-service restaurants show dynamism as market conditions improve

INDUSTRY PERFORMANCE

Multiple growth drivers for limited-service restaurants in 2025
Expansion drives strong foodservice value sales growth for chicken limited-service restaurants in 2025
Delivery remains significant as players expand fulfillment scope

WHAT'S NEXT?

Continued growth expected for limited-service restaurants
Delivery to gain momentum as fulfillment evolves
Players to push sustainability

COMPETITIVE LANDSCAPE

Jollibee strengthens products and services to consolidate leadership
South Korean fried chicken chain BBQ continues to post the highest growth rate in foodservice value sales
Franchising strengthens the dominance of chained operators

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 the Philippines - Industry Overview

EXECUTIVE SUMMARY

Improving local conditions spur consumer foodservice value sales

KEY DATA FINDINGS

INDUSTRY PERFORMANCE

Easing inflation and mobility normalisation support consumer foodservice growth in 2025
Fulfillment continues to shape how consumers access foodservice
Outlet refreshes and network expansion improve the consumer experience

WHAT'S NEXT?

Positive performance expected for consumer foodservice as key trends continue over the forecast period
Innovation to focus on digital ecosystems and operational efficiency

Sustainability to gain weight in major chains

COMPETITIVE LANDSCAPE

Jollibee invests to consolidate its leadership in 2025
Ai-cha Food PH Inc emerges as the most dynamic company in 2025
Major company and brand developments in 2024-2025

CHANNELS

Chained operators make gains through franchising
Independents adjust to meet growing challenges and remain competitive

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
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-the-philippines/report.