Euromonitor International

Limited-Service Restaurants in the US

March 2026

Table of Contents

Limited-Service Restaurants in the US - Category analysis

KEY DATA FINDINGS

2025 DEVELOPMENTS

Value and convenience drive growth amid pricing pressures

INDUSTRY PERFORMANCE

Limited-service growth continues apace as convenience and value take centre stage
Chained Middle Eastern limited-service restaurants sees the strongest growth
Fulfilment in the US continues to favour convenience

WHAT'S NEXT?

Limited-service restaurants set to see significant growth over the forecast period
Fulfilment channels to become less discrete as formats evolve
Innovation will stand out as an important tool to combat price and labour disruptions

COMPETITIVE LANDSCAPE

McDonald's returns to its Monopoly roots
Blaze Pizza sees strong growth as it slices through the competition
Chained limited-service restaurants holds the lion's share of sales

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 US - Industry Overview

EXECUTIVE SUMMARY

Macroeconomic and policy disruptions reshape consumer foodservice

KEY DATA FINDINGS

INDUSTRY PERFORMANCE

Navigating operational volatility and the premiumisation of value
Brands adapt to capture value-conscious diners demanding convenience
Loyalty programmes and experiences connect with customers in a price-sensitive world

WHAT'S NEXT?

Challenges abound, but US consumers still love to eat
The legacy of GLP-1

Sustainability and health policy shifts

COMPETITIVE LANDSCAPE

The golden arches remain important in consumer foodservice in the US
Dutch Bros continues to see the winds blow in its favour
K-Brands and beyond continue to push experiential dining in the US market

CHANNELS

Chained and independent operators continue to face bankruptcy and closures
Delivery is automating to try and overcome human sentiment about delivery fees

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-the-us/report.