



# Limited-Service Restaurants in Spain

March 2026

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## Limited-Service Restaurants in Spain - Category analysis

### KEY DATA FINDINGS

#### 2025 DEVELOPMENTS

Limited-service restaurants record strong growth during rising prices and changing consumer preferences

#### INDUSTRY PERFORMANCE

Limited-service restaurants outpace full-service player in Spain during ongoing price pressures

Burgers and Latin American cuisine drive growth due to rising appeal

Online food delivery sustains growth in 2025 despite regulatory and market pressures

#### WHAT'S NEXT?

Digital engagement and local sourcing will strengthen competition in limited-service restaurants

Online delivery is expected to surpass takeaway in value growth over the forecast period

Plant-based innovation is expected to influence menus in limited-service restaurants

#### COMPETITIVE LANDSCAPE

Ownership transition will support Burger King's next phase of growth in Spain

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## Consumer Foodservice in Spain - Industry Overview

### EXECUTIVE SUMMARY

Easing inflation, tourism and digital innovation support growth in consumer foodservice in 2025

### KEY DATA FINDINGS

#### INDUSTRY PERFORMANCE

Stabilising inflation, strong tourism and economic recovery support growth in 2025

Digital platforms and loyalty integration accelerate the expansion of delivery in Spain

Experiential formats and event-based dining strengthen consumer engagement

#### WHAT'S NEXT?

Tourism, easing inflation and rising mobility are set to support foodservice growth in Spain

Health and functional nutrition are expected to reshape menu strategies

Sustainability strategies will be transforming operations and menu development

## COMPETITIVE LANDSCAPE

Leading global chains strengthen positions through expansion, digitalisation and convenience-led formats

Experiential dining drives dynamic growth for Hard Rock Café in Spain

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Independent operators lead through authenticity but face competition from well-resourced chains

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