Euromonitor International

Limited-Service Restaurants in the United Kingdom

March 2026

Limited-Service Restaurants in the United Kingdom - Category analysis

KEY DATA FINDINGS

2025 DEVELOPMENTS

Chain scale widens the performance gap in UK limited-service restaurants

INDUSTRY PERFORMANCE

Scale and strategic investment drive chains ahead of independents
Latin American and Asian cuisines emerge as cuisine-led growth engines
Consumers balance convenience and cost through fulfilment choices

WHAT'S NEXT?

Chained operators and both emerging and established formats set to sustain growth
Operators will increasingly rebalance fulfilment channels to match distinct consumption occasions
Expansion through sustainability and tech innovation

COMPETITIVE LANDSCAPE

Competitive leadership reflected throughput and format efficiency, not footprint alone
Challenger brands outpace incumbents, while some established players retrench
Chained operators lead value sales despite independents dominating outlet numbers

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 United Kingdom - Industry Overview

EXECUTIVE SUMMARY

Chains lead value growth through price rises and convenience offer

KEY DATA FINDINGS

INDUSTRY PERFORMANCE

Price-led growth underpins value expansion amid subdued volumes
Convenience-led occasions sustain everyday demand
Experiences and loyalty strengthen engagement in a pressured environment

WHAT'S NEXT?

Growth to remain resilient but increasingly selective
Innovation shifts towards formats, menus and operating models

Sustainability will become pragmatic and cost-driven

COMPETITIVE LANDSCAPE

Market leadership reflects scale, throughput and efficiency
Challenger brands deliver momentum through focused formats and cuisine-led appeal
Portfolio rationalisation and format repositioning reshape competition

CHANNELS

Chains consolidate value leadership as independents face pressure
Fulfilment strategies balance convenience and cost sensitivity

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-united-kingdom/report.