



Consumer Foodservice By Location in Ireland

March 2026

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KEY DATA FINDINGS

2025 DEVELOPMENTS

Standalone and non-standalone reinforce their complementary roles in 2025

INDUSTRY PERFORMANCE

Retail-led foodservice outperforms other non-standalone locations as shopping-linked consumption strengthens in 2025

Standalone foodservice value sales rise as destination dining and convenience formats regain momentum

Independents emphasise quality, freshness and customisation, while chains focus on operational efficiency and fulfilment integration

WHAT'S NEXT?

Retail to remain the most dynamic non-standalone location as foodservice aligns with experience-led shopping

Standalone foodservice value sales to rise as localised demand and convenience formats gain importance

Cost pressures challenge operators, while location flexibility creates new growth opportunities

Demographic shifts favour suburban, family-friendly and commuter-oriented locations

COMPETITIVE LANDSCAPE

McDonald's leads non-standalone locations by leveraging scale, convenience and captive footfall

Supermac's leads standalone locations through local relevance and destination-led dining

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Consumer Foodservice in Ireland - Industry Overview

EXECUTIVE SUMMARY

Growth supported by digital convenience, sustainability, and evolving consumer priorities

KEY DATA FINDINGS

INDUSTRY PERFORMANCE

Inflation drives price sensitivity, shifting demand toward affordable foodservice formats

Digital ordering and delivery surge as consumers prioritise convenience and speed
Personalised experiences and loyalty programmes gain importance amid rising competition

WHAT'S NEXT?

Tourism recovery and tech adoption to fuel growth despite cost pressures
Automation and hybrid formats emerge as key strategies to tackle rising costs
Eco-friendly practices and ethical sourcing essential for long-term competitiveness

COMPETITIVE LANDSCAPE

Affordable menus and digital engagement secure McDonald's leadership
Tech-driven delivery and rapid expansion propel Apache Pizza as Ireland's fastest-growing brand
Chains and independents innovate with health-focused menus and sustainability-led store formats

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Chains thrive on tech and scale, while independents battle cost and delivery challenges
Digital tools and eco-friendly practices redefine innovation

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