Consumer Foodservice in Ireland

March 2026

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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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Digital tools and eco-friendly practices redefine innovation

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Café culture strengthens as consumers maintain high coffee consumption habits

Specialist coffee chains accelerate growth as consumers favour reliable quality
Cafés with faster service and takeaway focus outperform as value and convenience influence choices

WHAT'S NEXT?

Cafés/bars value sales to rise as coffee culture and social dining remain resilient along with growing remote work
Cafés enhance fulfilment for remote workers with workspace appeal, Wi-Fi and flexible service formats
Sustainability initiatives to rise as cafés adopt circular economy practices

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INDUSTRY PERFORMANCE

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Wagamama and new full-service formats anchor Asian and experiential dining growth in 2025
Value for money and rising price sensitivity influence dining decisions as cost concerns grow in 2025

WHAT'S NEXT?

Value sales set to rise as premium and experiential dining demand strengthens
Fulfilment to evolve through hybrid dine-in, takeaway and chef-driven digital experiences
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COMPETITIVE LANDSCAPE

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WHAT'S NEXT?

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INDUSTRY PERFORMANCE

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Chained operators show relative dynamism as scale and contracts support adaptation

Value for money is key as consumers weigh trade-offs with alternative foodservice options

WHAT'S NEXT?

Challenge as consumer preference shifts to quality, health and sustainable alternatives

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COMPETITIVE LANDSCAPE

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INDUSTRY PERFORMANCE

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Independent street food traders drive category dynamism amid structural shifts

Value for money and experiential appeal drive consumer trade-offs

WHAT'S NEXT?

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Sustainability and innovation reshape street food, with eco-friendly packaging and new menu concepts drawing demand

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INDUSTRY PERFORMANCE

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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?

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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

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

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