



Euromonitor
International

Limited-Service Restaurants in the US

March 2026

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Limited-Service Restaurants in the US - Category analysis

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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

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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

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Consumer Foodservice in the US - Industry Overview

EXECUTIVE SUMMARY

Macroeconomic and policy disruptions reshape consumer foodservice

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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

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

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Delivery is automating to try and overcome human sentiment about delivery fees

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