

United States Quick Service Restaurants - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2026 - 2031)

Market Report | 2026-02-09 | 159 pages | Mordor Intelligence

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Report description:

United States Quick Service Restaurants Market Analysis

The United States quick service restaurants market was valued at USD 447.20 billion in 2025 and estimated to grow from USD 491.65 billion in 2026 to reach USD 789.65 billion by 2031, at a CAGR of 9.94% during the forecast period (2026-2031). Brands are leveraging digital ordering, AI-driven kitchens, and rapid franchise expansions to boost revenue and attract more customers. With the help of robotics and voice AI, brands are not only shortening service times but also expanding their delivery reach through ghost kitchens and enhancing sales with data-driven menu boards. As minimum wages rise and food prices climb, operators are increasingly turning to automation. Meanwhile, private-label loyalty programs are fostering repeat visits. The competitive landscape reveals a growing divide: technology-savvy chains are pulling ahead of their resource-limited independent counterparts. Yet, with localized menus and a strong community focus, smaller operators still find opportunities to flourish.

United States Quick Service Restaurants Market Trends and Insights

AI-Driven Automation and Smart Kitchens

Quick-service restaurants (QSRs) are increasingly turning to artificial intelligence (AI) to address labor shortages and enhance operational efficiency. For instance, Chipotle Mexican Grill has adopted Hyphen's robotic systems for bowl assembly, slashing preparation time by 50% and ensuring consistency across its outlets. Beyond robotics, smart kitchen technologies encompass predictive inventory management, demand forecasting, and automated quality control, all of which bolster profit margins. As labor

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costs surge, especially in states like California facing stringent minimum wage laws, the push for operational efficiency intensifies. Furthermore, McDonald's collaboration with IBM highlights the potential of Voice AI in drive-thrus, demonstrating how conversational interfaces can expedite order processing and enhance accuracy.

Expansion of Online Food Delivery and Contactless Services

According to the company's annual report, digital ordering channels accounted for 36.7% of Chipotle's total sales in Q3 2025, up from 35.1% for the full year in 2024, underscoring the increasingly critical role of delivery integration in the QSR's revenue mix. The broadened acceptance of SNAP/EBT on delivery platforms opens doors for new customer acquisitions, particularly targeting lower-income groups who were previously excluded from premium delivery services. While contactless payments surged during the pandemic, their evolution continues with innovations like Panera's palm-scanning and Steak 'n Shake's facial recognition technologies. Such investments in tech not only fortify competitive advantages but also yield invaluable customer data, steering menu tweaks and focused marketing efforts. As the delivery landscape matures, QSR brands are capturing market share in previously hard-to-reach areas due to partnerships with ghost kitchens and the rise of virtual brand concepts.

Changing Consumer Preferences and Dietary Trends

Recent studies reveal that over 67% of American diners are actively seeking healthier options, posing challenges for traditional quick-service restaurants (QSRs). While there's a growing adoption of plant-based menus, QSR operators grapple with the fact that alternative proteins cost 20-30% more than their conventional counterparts, curbing potential profit margins. Furthermore, as consumers demand transparency in ingredient sourcing and nutritional details, QSRs find themselves needing to overhaul their supply chains and reformulate menus, complicating operations. The trend of home cooking, which surged during pandemic lockdowns, continues to influence how often certain demographic groups dine out at QSRs. Notably, generational preferences are at odds: Gen Z champions sustainability and ethical sourcing, whereas older consumers lean towards value and convenience.

Other drivers and restraints analyzed in the detailed report include:

Drive-Thru and Self-Service Kiosks Enhancements
Expansion of Innovative Service Models like Cloud Kitchens
Rising Food and Labor Costs

For complete list of drivers and restraints, kindly check the Table Of Contents.

Segment Analysis

In 2025, meat-based cuisines dominate the market with a 37.88% share, underscoring the American palate's preference for protein-rich options, particularly in burgers, chicken, and specialty meats. Ice cream, positioning itself as a premium dessert, is the fastest-growing segment, boasting a 12.15% CAGR through 2031, due to strategies that extend its operating season. While burger concepts are integrating plant-based alternatives and premium ingredients, pizza segments are harnessing delivery optimizations and customization technologies. Bakeries are capitalizing on breakfast expansions and coffee pairings, boosting both transaction frequency and average order values.

Menu development is shaped by the regulatory landscape, with FDA nutritional labeling mandates pushing for ingredient transparency across all cuisines. Meanwhile, other QSR offerings, spanning ethnic and fusion cuisines, are thriving. They tap into cultural diversity trends and experiential dining, setting themselves apart from conventional American dishes. This trend mirrors a demographic shift: younger consumers are gravitating towards authentic flavors and visually appealing presentations, amplifying their social media engagement and brand loyalty.

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In 2025, independent outlets hold a commanding 57.10% market share, showcasing an entrepreneurial adaptability and responsiveness to local markets that larger chains find challenging to emulate. Yet, chained outlets are outpacing them with a robust growth rate of 10.42% CAGR. These chains harness operational standardization, invest in technology, and capitalize on supply chain economies, carving out sustainable competitive advantages. Meanwhile, the evolving franchise model is increasingly integrating digital transformation and automation, favoring those operators with deep pockets and technical know-how.

Independent operators grapple with mounting pressures from escalating labor costs and stringent regulatory compliance. These challenges hit harder on smaller businesses, which often lack dedicated administrative resources. In contrast, chained outlets enjoy the luxury of corporate backing, enabling them to wield bulk purchasing power and implement standardized training. This not only simplifies operations but also enhances consistency. The competitive landscape hints at a trend towards market consolidation. Successful independent concepts are either scaling up through franchising or becoming prime targets for acquisition by larger restaurant groups. These giants are on the lookout for deeper local market penetration and opportunities to diversify their menus.

The United States Quick Service Restaurants Report is Segmented by Cuisine (Bakeries, Burger, Ice Cream, Meat-Based Cuisines, Pizza, Other QSR Cuisines), Outlet (Chained Outlets, Independent Outlets), Location (Leisure, Lodging, Retail, Standalone, Travel), Service Type (Dine-In, Takeaway, Delivery). The Market Forecasts are Provided in Terms of Value (USD).

List of Companies Covered in this Report:

McDonald's Corporation Starbucks Corporation Chick-fil-A, Inc. Doctor's Associates Inc. Chipotle Mexican Grill Inc. Domino's Pizza Inc. Papa John's International Inc. Jimmy John's Franchise, LLC Raising Cane's Chicken Fingers Wingstop Inc. Inspire Brands Inc. Jack in the Box Inc. The Wendy's Company JAB Holding Company Ilitch Holdings Inc. Restaurant Brands International Inc. Zaxby's Operating Company L.P. Whataburger, Inc. Papa Murphy's Holdings Culver Franchising System, Inc.

Additional Benefits:

The market estimate (ME) sheet in Excel format
3 months of analyst support

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