

FAST FOOD

FAST FOOD TOP 10:

Brand Value (US\$M)



DEFINITION:

The Fast Food category includes quick service restaurants (QSR) and casual dining brands, which vary in customer and menu focus, but mostly compete for the same dayparts.

ORDER UP/ FAST FOOD BRANDS COURT YOUNG DINERS

Category Brand Value
Year-on-Year Change

2%

Fast Food Top 10
Total Brand Value

\$415,394 M

Source: Kantar/Kantar BrandZ (including data from S&P Capital IQ and Euromonitor)

FAST FOOD

The value of the world's top Fast Food brands grows by 2% this year.

It's been a year of intense competition. Challenger brands worldwide are eager to break up the major players' dominance. One way they've done so is by zeroing in on areas like tea, pastry, and ice cream that the big US brands typically haven't pursued.

Challengers also tend to focus on a few key consumer segments and hero items, rather than trying to have something for everyone. Low-cost lemon tea and ice cream specialist Mixue Bingcheng, for example, eschews prime downtown locations in favour of mid-street stalls in student neighbourhoods. Mixue recently surpassed McDonalds in total store count worldwide, as part of a wave of Chinese brands expanding abroad.

What do young diners want? And just as importantly, what do they feel they can afford? These are crucial questions for fast food brands of all sizes. One important answer to both questions, and across multiple dayparts, is drinks as an affordable 'sweet treat'.

It's why Taco Bell has gone all-in on expanding its Baja Blast platform into freezes, energy-style drinks, and seasonal drops. And why Chick-fil-A continues to scale its Peach Milkshake and Sunjoy strategy, blending nostalgia with limited-time beverage releases. The race is on, in other words, for momentum – for excess Meaningful Difference that fuels expansion into new domains like drinks.

Meanwhile, food items are slimming down as consumers shift from 'bigger is better' to 'right-sized indulgence'. In the US, Kantar Retail data shows that approximately 10% of adults already use GLP-1 drugs. And that number should only rise.

There's also a search for value options. In an era where 'premium' bowls at quick-service chains can cost over \$15, new \$5 offers at previously struggling chains like Burger King and Subway have hit.

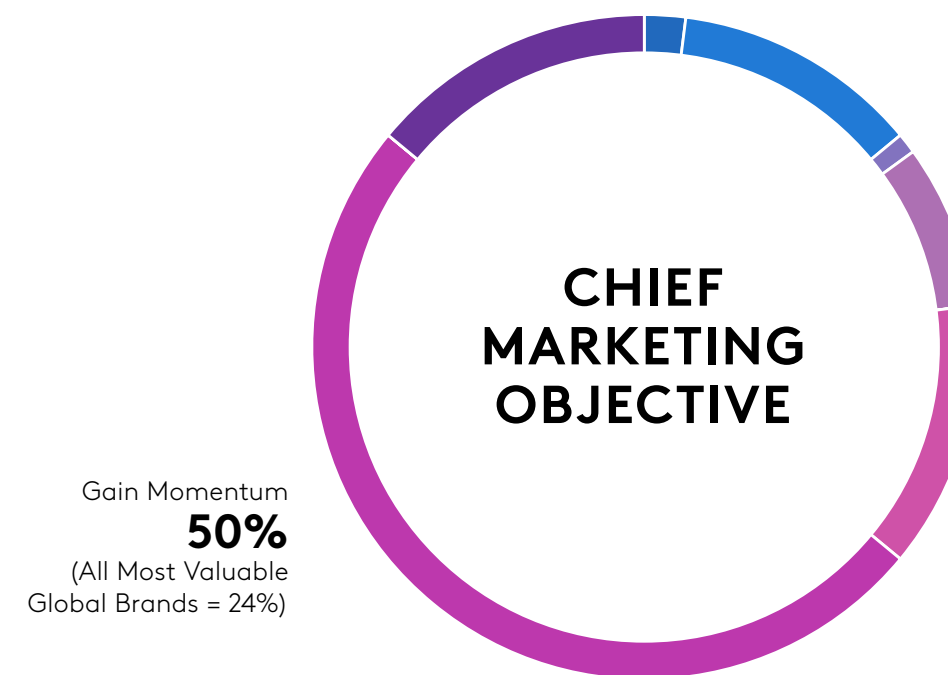
Global expansion is another big theme for top brands. Even as Starbucks eases up on its China push, McDonald's and KFC continue to see that market as essential to their future growth.

Last but not least is the rise of advanced AI. Globally, AI-driven personalisation and predictive menus are redefining that first moment of truth: the mobile order.

As mobile orders can often exceed 60% of QSR transactions in major markets, the digital storefront has effectively become the new drive-thru lane. And it's a lane that's powered by algorithms, not live attendants.

As such, ordering platforms now anticipate preferences, adjust recommendations by time of day or weather, and even tailor combos to dietary needs.

Top brands could unlock growth by gaining momentum
% of Fast Food Top 10 within each Objective



Source: Kantar BrandZ, Top 10 Fast Food Brands; Most Valuable Global Brands 2026



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Delicious isn't enough

A common myth that still exists among QSR brands is that taste is the sole guarantor of loyalty. While taste is still king, it no longer rules alone. In a region where delivery penetration is among the highest globally, the crown is now shared with the logistics of indulgence. More than one in three fast-food moments now occur via an app. In this delivery-first economy, the psychological perception of indulgence – that specific craving for a crispy, hot reward – is fragile. If a premium chicken sandwich arrives lukewarm or fries lose their structure, the taste is irrelevant. The consumer doesn't blame the courier; they devalue the brand.

In the GCC, where extreme heat and high expectations for speed intersect, delivery experience has become the ultimate non-negotiable. You can survive a slight delay, but you cannot survive soggy fries. So, for regional operators, acing the market means realising that your product isn't just the food: it's the temperature and texture at the moment of the first bite. If the delivery fails the indulgence test, the brand fails to secure the future order. Success requires new-age packaging and AI-optimised routing that ensures little to no taste difference between at-store and at-home experience.

FAST FOOD

BRAND SPOTLIGHT



2026 BRAND VALUE

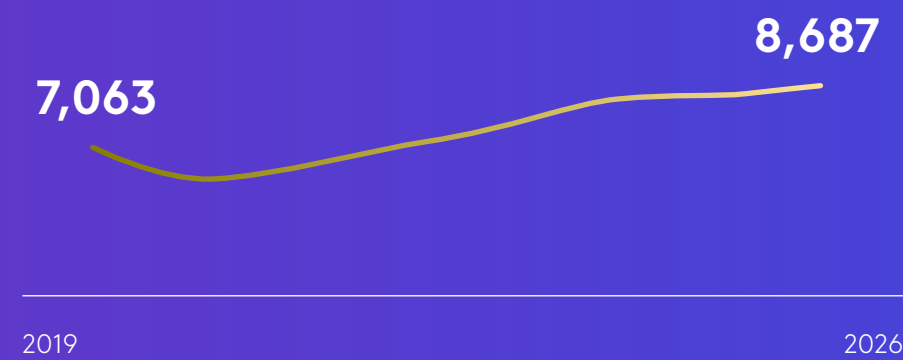
\$8,687 M

+4% vs 2025

Fanning the flames of growth

Burger King stopped chasing category sameness (chicken, wraps, mimicry) and doubled down on what it most credibly owns: flame grilled burgers and the Whopper. Whopper-led flavour innovations make Burger King feel more distinctive and more expert than its peers who treat burgers as interchangeable. The result is stronger perceived differentiation on taste, scale, and burger authority. This clarity has been reinforced through large scale restaurant refreshes and digital upgrades. Importantly, Burger King has modernised without losing its edge, keeping flame grilled cues and humour front and centre. These days, Burger King's experience matches its promise much more closely, making the brand feel dependable and distinct.

Burger King Brand Value (US\$M)



Difference Index, US



Source: Kantar BrandZ, US, Fast Food, 2023-2025

BRAND TO WATCH



Founded in 1993, **Texas Roadhouse** is a casual steakhouse chain in 800 locations, known for its hand cut steaks, generous portions, and family friendly atmosphere. It has a reputation for serving smaller US communities that other brands miss.



Source: Kantar BrandZ, USA, Casual Dining, 2024

IMPLICATIONS

01

REVAMP THE HERITAGE

Fast food brands with momentum unlocked better brand value growth this year. In a highly competitive category, fast food brands need to build on their strong cores to revive and refresh what already works. Through innovations and bolder marketing, they must build on these heritage assets to excite new generations.

02

GAIN MORE AI PRECISION

In a mature and crowded category, growth comes from being sharper, faster, and more relevant – not merely visible. Fast food brands should use AI to identify their highest-potential products, audiences, and occasions. Personalising at scale and learning fast about what works is where AI excels.