

# Consumer Foodservice in South Africa

March 2025

**Table of Contents** 

## Consumer Foodservice in South Africa

## **EXECUTIVE SUMMARY**

Consumer foodservice in 2024: The big picture

2024 key trends

Competitive landscape

Independent foodservice developments

What next for consumer foodservice?

#### MARKET DATA

- Table 1 Units, Transactions and Value Sales in Consumer Foodservice 2019-2024
- Table 2 Units, Transactions and Value Sales in Consumer Foodservice: % Growth 2019-2024
- Table 3 Consumer Foodservice by Independent vs Chained by Type: Units/Outlets 2024
- Table 4 Consumer Foodservice by Independent vs Chained: % Foodservice Value 2019-2024
- Table 5 Sales in Consumer Foodservice by Food vs Drink Split: % Foodservice Value 2019-2024
- Table 6 Sales in Consumer Foodservice by Food vs Drink Split by Type: % Foodservice Value 2024
- Table 7 Sales in Consumer Foodservice by Location: % Foodservice Value 2019-2024
- Table 8 Sales in Consumer Foodservice by Fulfillment: % Foodservice Value 2019-2024
- Table 9 GBO Company Shares in Chained Consumer Foodservice: % Foodservice Value 2020-2024
- Table 10 GBN Brand Shares in Chained Consumer Foodservice: % Foodservice Value 2021-2024
- Table 11 GBN Brand Shares in Chained Consumer Foodservice: Units/Outlets 2024
- Table 12 Forecast Units, Transactions and Value Sales in Consumer Foodservice 2024-2029
- Table 13 Forecast Units, Transactions and Value Sales in Consumer Foodservice: % Growth 2024-2029

## DISCLAIMER

## **SOURCES**

Summary 1 - Research Sources

## Cafés/Bars in South Africa

## **KEY DATA FINDINGS**

## 2024 DEVELOPMENTS

Daytime dining continues to present significant growth opportunities during a tough economic climate Independent cafés and coffee shops play vital roles in driving growth

Mugg & Bean continues to innovate through technology and alternative offerings

## PROSPECTS AND OPPORTUNITIES

Smaller format cafés to gain popularity as they look to drive future growth

Increasing number of cafés adapt offering to include remote working facilities

Pret A Manger opens first outlet in South Africa with more expected over forecast period

# **CATEGORY DATA**

- Table 14 Cafés/Bars by Category: Units/Outlets 2019-2024
- Table 15 Sales in Cafés/Bars by Category: Number of Transactions 2019-2024
- Table 16 Sales in Cafés/Bars by Category: Foodservice Value 2019-2024
- Table 17 Cafés/Bars by Category: % Units/Outlets Growth 2019-2024
- Table 18 Sales in Cafés/Bars by Category: % Transaction Growth 2019-2024
- Table 19 Sales in Cafés/Bars by Category: % Foodservice Value Growth 2019-2024
- Table 20 GBO Company Shares in Chained Cafés/Bars: % Foodservice Value 2020-2024
- Table 21 GBN Brand Shares in Chained Cafés/Bars: % Foodservice Value 2021-2024
- Table 22 Forecast Cafés/Bars by Category: Units/Outlets 2024-2029
- Table 23 Forecast Sales in Cafés/Bars by Category: Number of Transactions 2024-2029

- Table 24 Forecast Sales in Cafés/Bars by Category: Foodservice Value 2024-2029
- Table 25 Forecast Cafés/Bars by Category: % Units/Outlets Growth 2024-2029
- Table 26 Forecast Sales in Cafés/Bars by Category: % Transaction Growth 2024-2029
- Table 27 Forecast Sales in Cafés/Bars by Category: % Foodservice Value Growth 2024-2029

## Full-Service Restaurants in South Africa

## **KEY DATA FINDINGS**

## 2024 DEVELOPMENTS

Consumers seek value as economic climate weakens disposable incomes

Spur retains lead of chained full-service restaurants through acquisitions and greater consumer engagement Strategic partnerships with financial and other institutions to expand consumer reach

## PROSPECTS AND OPPORTUNITIES

Brands look to move into small towns and untapped markets to drive future growth

Brands look to leverage digital innovation over forecast period

Health and wellness trend set to shape further development

## **CATEGORY DATA**

- Table 28 Full-Service Restaurants by Category: Units/Outlets 2019-2024
- Table 29 Sales in Full-Service Restaurants by Category: Number of Transactions 2019-2024
- Table 30 Sales in Full-Service Restaurants by Category: Foodservice Value 2019-2024
- Table 31 Full-Service Restaurants by Category: % Units/Outlets Growth 2019-2024
- Table 32 Sales in Full-Service Restaurants by Category: % Transaction Growth 2019-2024
- Table 33 Sales in Full-Service Restaurants by Category: % Foodservice Value Growth 2019-2024
- Table 34 GBO Company Shares in Chained Full-Service Restaurants: % Foodservice Value 2020-2024
- Table 35 GBN Brand Shares in Chained Full-Service Restaurants: % Foodservice Value 2021-2024
- Table 36 Forecast Full-Service Restaurants by Category: Units/Outlets 2024-2029
- Table 37 Forecast Sales in Full-Service Restaurants by Category: Number of Transactions 2024-2029
- Table 38 Forecast Sales in Full-Service Restaurants by Category: Foodservice Value 2024-2029
- Table 39 Forecast Full-Service Restaurants by Category: % Units/Outlets Growth 2024-2029
- Table 40 Forecast Sales in Full-Service Restaurants by Category: % Transaction Growth 2024-2029
- Table 41 Forecast Sales in Full-Service Restaurants by Category: % Foodservice Value Growth 2024-2029

## Limited-Service Restaurants in South Africa

## **KEY DATA FINDINGS**

# 2024 DEVELOPMENTS

Despite tough economic conditions, limited-service restaurants continues to grow KFC remains leading brand, driven by popularity of chicken in South Africa

Consumers increasingly aware of high prices associated with third-party delivery

## PROSPECTS AND OPPORTUNITIES

Digitalisation and technological innovation set to drive growth over forecast period

Fulfilment landscape is set to evolve over the forecast period

Innovative concept stores are set to revolutionise limited-service experience

# **CATEGORY DATA**

- Table 42 Limited-Service Restaurants by Category: Units/Outlets 2019-2024
- Table 43 Sales in Limited-Service Restaurants by Category: Number of Transactions 2019-2024
- Table 44 Sales in Limited-Service Restaurants by Category: Foodservice Value 2019-2024
- Table 45 Limited-Service Restaurants by Category: % Units/Outlets Growth 2019-2024

- Table 46 Sales in Limited-Service Restaurants by Category: % Transaction Growth 2019-2024
- Table 47 Sales in Limited-Service Restaurants by Category: % Foodservice Value Growth 2019-2024
- Table 48 GBO Company Shares in Chained Limited-Service Restaurants: % Foodservice Value 2020-2024
- Table 49 GBN Brand Shares in Chained Limited-Service Restaurants: % Foodservice Value 2021-2024
- Table 50 Forecast Limited-Service Restaurants by Category: Units/Outlets 2024-2029
- Table 51 Forecast Sales in Limited-Service Restaurants by Category: Number of Transactions 2024-2029
- Table 52 Forecast Sales in Limited-Service Restaurants by Category: Foodservice Value 2024-2029
- Table 53 Forecast Limited-Service Restaurants by Category: % Units/Outlets Growth 2024-2029
- Table 54 Forecast Sales in Limited-Service Restaurants by Category: % Transaction Growth 2024-2029
- Table 55 Forecast Sales in Limited-Service Restaurants by Category: % Foodservice Value Growth 2024-2029

#### Street Stalls/Kiosks in South Africa

#### **KEY DATA FINDINGS**

#### 2024 DEVELOPMENTS

Chained limited-service operators look to expand by entering street stalls/kiosks

Sausage Saloons remains leading chained operator in a channel dominated by independent outlets

Digital payment options set to benefit street stalls/kiosks

## PROSPECTS AND OPPORTUNITIES

Heightened competition likely with introduction of new chained brands in local market Government looks to clamp down on recent string of foodborne illness deaths

## **CATEGORY DATA**

- Table 56 Street Stalls/Kiosks: Units/Outlets 2019-2024
- Table 57 Sales in Street Stalls/Kiosks: Number of Transactions 2019-2024
- Table 58 Sales in Street Stalls/Kiosks: Foodservice Value 2019-2024
- Table 59 Street Stalls/Kiosks: % Units/Outlets Growth 2019-2024
- Table 60 Sales in Street Stalls/Kiosks: % Transaction Growth 2019-2024
- Table 61 Sales in Street Stalls/Kiosks: % Foodservice Value Growth 2019-2024
- Table 62 GBO Company Shares in Chained Street Stalls/Kiosks: % Foodservice Value 2020-2024
- Table 63 GBN Brand Shares in Chained Street Stalls/Kiosks: % Foodservice Value 2021-2024
- Table 64 Forecast Street Stalls/Kiosks: Units/Outlets 2024-2029
- Table 65 Forecast Sales in Street Stalls/Kiosks: Number of Transactions 2024-2029
- Table 66 Forecast Sales in Street Stalls/Kiosks: Foodservice Value 2024-2029
- Table 67 Forecast Street Stalls/Kiosks: % Units/Outlets Growth 2024-2029
- Table 68 Forecast Sales in Street Stalls/Kiosks: % Transaction Growth 2024-2029
- Table 69 Forecast Sales in Street Stalls/Kiosks: % Foodservice Value Growth 2024-2029

## Consumer Foodservice By Location in South Africa

## KEY DATA FINDINGS

# 2024 DEVELOPMENTS

Travel, leisure, and lodging locations experience a significant boost due to surge in tourists visiting South Africa Chained outlets look to untapped markets and smaller formats to drive growth

## PROSPECTS AND OPPORTUNITIES

Cost of prime city locations will continue to rise, presenting a challenge for brands

Impact of eVisa extension, major sporting events, and retail property development set to drive growth of consumer foodservice

Changing consumer preferences and tastes will require adaptability by foodservice players over forecast period

## **CATEGORY DATA**

- Table 70 Consumer Foodservice by Location: Units/Outlets 2019-2024
- Table 71 Sales in Consumer Foodservice by Location: Number of Transactions 2019-2024
- Table 72 Sales in Consumer Foodservice by Location: Foodservice Value 2019-2024
- Table 73 Consumer Foodservice by Location: % Units/Outlets Growth 2019-2024
- Table 74 Sales in Consumer Foodservice by Location: % Transaction Growth 2019-2024
- Table 75 Sales in Consumer Foodservice by Location: % Foodservice Value Growth 2019-2024
- Table 76 Consumer Foodservice through Standalone: Units/Outlets 2019-2024
- Table 77 Sales in Consumer Foodservice through Standalone: Number of Transactions 2019-2024
- Table 78 Sales in Consumer Foodservice through Standalone: Foodservice Value 2019-2024
- Table 79 Consumer Foodservice through Standalone: % Units/Outlets Growth 2019-2024
- Table 80 Sales in Consumer Foodservice through Standalone: % Transaction Growth 2019-2024
- Table 81 Sales in Consumer Foodservice through Standalone: % Foodservice Value Growth 2019-2024
- Table 82 Consumer Foodservice through Leisure: Units/Outlets 2019-2024
- Table 83 Sales in Consumer Foodservice through Leisure: Number of Transactions 2019-2024
- Table 84 Sales in Consumer Foodservice through Leisure: Foodservice Value 2019-2024
- Table 85 Consumer Foodservice through Leisure: % Units/Outlets Growth 2019-2024
- Table 86 Sales in Consumer Foodservice through Leisure: % Transaction Growth 2019-2024
- Table 87 Sales in Consumer Foodservice through Leisure: % Foodservice Value Growth 2019-2024
- Table 88 Consumer Foodservice through Retail: Units/Outlets 2019-2024
- Table 89 Sales in Consumer Foodservice through Retail: Number of Transactions 2019-2024
- Table 90 Sales in Consumer Foodservice through Retail: Foodservice Value 2019-2024
- Table 91 Consumer Foodservice through Retail: % Units/Outlets Growth 2019-2024
- Table 92 Sales in Consumer Foodservice through Retail: % Transaction Growth 2019-2024
- Table 93 Sales in Consumer Foodservice through Retail: % Foodservice Value Growth 2019-2024
- Table 94 Consumer Foodservice through Lodging: Units/Outlets 2019-2024
- Table 95 Sales in Consumer Foodservice through Lodging: Number of Transactions 2019-2024
- Table 96 Sales in Consumer Foodservice through Lodging: Foodservice Value 2019-2024
- Table 97 Consumer Foodservice through Lodging: % Units/Outlets Growth 2019-2024
- Table 98 Sales in Consumer Foodservice through Lodging: % Transaction Growth 2019-2024
- Table 99 Sales in Consumer Foodservice through Lodging: % Foodservice Value Growth 2019-2024
- Table 100 Consumer Foodservice through Travel: Units/Outlets 2019-2024
- Table 101 Sales in Consumer Foodservice through Travel: Number of Transactions 2019-2024
- Table 102 Sales in Consumer Foodservice through Travel: Foodservice Value 2019-2024
- Table 103 Consumer Foodservice through Travel: % Units/Outlets Growth 2019-2024
- Table 104 Sales in Consumer Foodservice through Travel: % Transaction Growth 2019-2024
- Table 105 Sales in Consumer Foodservice through Travel: % Foodservice Value Growth 2019-2024
- Table 106 Forecast Consumer Foodservice by Location: Units/Outlets 2024-2029
- Table 107 Forecast Sales in Consumer Foodservice by Location: Number of Transactions 2024-2029
- Table 108 Forecast Sales in Consumer Foodservice by Location: Foodservice Value 2024-2029
- Table 109 Forecast Consumer Foodservice by Location: % Units/Outlets Growth 2024-2029
- Table 110 Forecast Sales in Consumer Foodservice by Location: % Transaction Growth 2024-2029
- Table 111 Forecast Sales in Consumer Foodservice by Location: % Foodservice Value Growth 2024-2029
- Table 112 Forecast Consumer Foodservice through Standalone: Units/Outlets 2024-2029
- Table 113 Forecast Sales in Consumer Foodservice through Standalone: Number of Transactions 2024-2029
- Table 114 Forecast Sales in Consumer Foodservice through Standalone: Foodservice Value 2024-2029
- Table 115 Forecast Consumer Foodservice through Standalone: % Units/Outlets Growth 2024-2029
- Table 116 Forecast Sales in Consumer Foodservice through Standalone: % Transaction Growth 2024-2029
- Table 117 Forecast Sales in Consumer Foodservice through Standalone: % Foodservice Value Growth 2024-2029
- Table 118 Forecast Consumer Foodservice through Leisure: Units/Outlets 2024-2029
- Table 119 Forecast Sales in Consumer Foodservice through Leisure: Number of Transactions 2024-2029
- Table 120 Forecast Sales in Consumer Foodservice through Leisure: Foodservice Value 2024-2029
- Table 121 Forecast Consumer Foodservice through Leisure: % Units/Outlets Growth 2024-2029

- Table 122 Forecast Sales in Consumer Foodservice through Leisure: % Transaction Growth 2024-2029
- Table 123 Forecast Sales in Consumer Foodservice through Leisure: % Foodservice Value Growth 2024-2029
- Table 124 Forecast Consumer Foodservice through Retail: Units/Outlets 2024-2029
- Table 125 Forecast Sales in Consumer Foodservice through Retail: Number of Transactions 2024-2029
- Table 126 Forecast Sales in Consumer Foodservice through Retail: Foodservice Value 2024-2029
- Table 127 Forecast Consumer Foodservice through Retail: % Units/Outlets Growth 2024-2029
- Table 128 Forecast Sales in Consumer Foodservice through Retail: % Transaction Growth 2024-2029
- Table 129 Forecast Sales in Consumer Foodservice through Retail: % Foodservice Value Growth 2024-2029
- Table 130 Forecast Consumer Foodservice through Lodging: Units/Outlets 2024-2029
- Table 131 Forecast Sales in Consumer Foodservice through Lodging: Number of Transactions 2024-2029
- Table 132 Forecast Sales in Consumer Foodservice through Lodging: Foodservice Value 2024-2029
- Table 133 Forecast Consumer Foodservice through Lodging: % Units/Outlets Growth 2024-2029
- Table 134 Forecast Sales in Consumer Foodservice through Lodging: % Transaction Growth 2024-2029
- Table 135 Forecast Sales in Consumer Foodservice through Lodging: % Foodservice Value Growth 2024-2029
- Table 136 Forecast Consumer Foodservice through Travel: Units/Outlets 2024-2029
- Table 137 Forecast Sales in Consumer Foodservice through Travel: Number of Transactions 2024-2029
- Table 138 Forecast Sales in Consumer Foodservice through Travel: Foodservice Value 2024-2029
- Table 139 Forecast Consumer Foodservice through Travel: % Units/Outlets Growth 2024-2029
- Table 140 Forecast Sales in Consumer Foodservice through Travel: % Transaction Growth 2024-2029
- Table 141 Forecast Sales in Consumer Foodservice through Travel: % Foodservice Value Growth 2024-2029

# About Euromonitor International

Euromonitor International is an independent market intelligence provider. Data, insight and analysis stem from in-the-field research spanning 210 national markets.

Content ranges from the in-depth and country-specific, to key strategic themes with a global range and significance. Products cover a comprehensive range of insights and market data, but can be broadly categorised as:

- Strategy Briefings: Global or regional in scope, and focussing on the most important themes shaping consumer demand, the key markets, competitive environment and future outlook across a range of industries.
- Company Profiles: Analysis dedicated to the world's most significant companies, with detailed insight into their activities, focus of operations, their competitors, their geographic presence and performance.
- Country Reports: For an in-depth understanding of specific countries, whether by industry, economic metrics or consumer
  trends and lifestyles. These reports cover current trends, consumer demand, market potential and future prospects, with
  country-specific local insight and comprehensive data, unavailable elsewhere.

For more information on this report, further enquiries can be directed via this link www.euromonitor.com/consumer-foodservice-in-south-africa/report.