

Consumer Foodservice in Australia

February 2024

Table of Contents

Consumer Foodservice in Australia

EXECUTIVE SUMMARY

Consumer foodservice in 2023: The big picture

2023 key trends

Competitive landscape

Independent foodservice developments

What next for consumer foodservice?

MARKET DATA

- Table 1 Units, Transactions and Value Sales in Consumer Foodservice 2018-2023
- Table 2 Units, Transactions and Value Sales in Consumer Foodservice: % Growth 2018-2023
- Table 3 Consumer Foodservice by Independent vs Chained by Type: Units/Outlets 2023
- Table 4 Consumer Foodservice by Independent vs Chained: % Foodservice Value 2018-2023
- Table 5 Sales in Consumer Foodservice by Food vs Drink Split: % Foodservice Value 2018-2023
- Table 6 Sales in Consumer Foodservice by Food vs Drink Split by Type: % Foodservice Value 2023
- Table 7 Sales in Consumer Foodservice by Location: % Foodservice Value 2018-2023
- Table 8 GBO Company Shares in Chained Consumer Foodservice: % Foodservice Value 2019-2023
- Table 9 GBN Brand Shares in Chained Consumer Foodservice: % Foodservice Value 2020-2023
- Table 10 GBN Brand Shares in Chained Consumer Foodservice: Units/Outlets 2023
- Table 11 Forecast Units, Transactions and Value Sales in Consumer Foodservice 2023-2028
- Table 12 Forecast Units, Transactions and Value Sales in Consumer Foodservice: % Growth 2023-2028

DISCLAIMER

SOURCES

Summary 1 - Research Sources

Cafés/Bars in Australia

KEY DATA FINDINGS

2023 DEVELOPMENTS

Consumers reduce spending amid cost-of-living crisis

Rising cost of production results in an increase in debit/credit card surcharges

lced coffee becomes increasingly fashionable among local consumers

PROSPECTS AND OPPORTUNITIES

Concerns over staff availability and costs a major challenge for cafés/bars

Creating an environment to accommodate remote workers

Bubble tea experiences weaker performance despite surge in popularity in recent years

- Table 13 Cafés/Bars by Category: Units/Outlets 2018-2023
- Table 14 Sales in Cafés/Bars by Category: Number of Transactions 2018-2023
- Table 15 Sales in Cafés/Bars by Category: Foodservice Value 2018-2023
- Table 16 Cafés/Bars by Category: % Units/Outlets Growth 2018-2023
- Table 17 Sales in Cafés/Bars by Category: % Transaction Growth 2018-2023
- Table 18 Sales in Cafés/Bars by Category: % Foodservice Value Growth 2018-2023
- Table 19 GBO Company Shares in Chained Cafés/Bars: % Foodservice Value 2019-2023
- Table 20 GBN Brand Shares in Chained Cafés/Bars: % Foodservice Value 2020-2023
- Table 21 Forecast Cafés/Bars by Category: Units/Outlets 2023-2028
- Table 22 Forecast Sales in Cafés/Bars by Category: Number of Transactions 2023-2028
- Table 23 Forecast Sales in Cafés/Bars by Category: Foodservice Value 2023-2028

- Table 24 Forecast Cafés/Bars by Category: % Units/Outlets Growth 2023-2028
- Table 25 Forecast Sales in Cafés/Bars by Category: % Transaction Growth 2023-2028
- Table 26 Forecast Sales in Cafés/Bars by Category: % Foodservice Value Growth 2023-2028

Full-Service Restaurants in Australia

KEY DATA FINDINGS

2023 DEVELOPMENTS

Increase in single-person dining as consumer behaviour shifts in Australia

Change in regulation to introduce mandatory country of origin labelling for seafood

Restaurants forced to address changing employee expectations

PROSPECTS AND OPPORTUNITIES

Evaluating the role of full-service restaurants in an evolving world

Future of chained full-service restaurants in doubt as outlet numbers stagnate

Omnichannel service and robotics could help alleviate full-service restaurant concerns

CATEGORY DATA

- Table 27 Full-Service Restaurants by Category: Units/Outlets 2018-2023
- Table 28 Sales in Full-Service Restaurants by Category: Number of Transactions 2018-2023
- Table 29 Sales in Full-Service Restaurants by Category: Foodservice Value 2018-2023
- Table 30 Full-Service Restaurants by Category: % Units/Outlets Growth 2018-2023
- Table 31 Sales in Full-Service Restaurants by Category: % Transaction Growth 2018-2023
- Table 32 Sales in Full-Service Restaurants by Category: % Foodservice Value Growth 2018-2023
- Table 33 GBO Company Shares in Chained Full-Service Restaurants: % Foodservice Value 2019-2023
- Table 34 GBN Brand Shares in Chained Full-Service Restaurants: % Foodservice Value 2020-2023
- Table 35 Forecast Full-Service Restaurants by Category: Units/Outlets 2023-2028
- Table 36 Forecast Sales in Full-Service Restaurants by Category: Number of Transactions 2023-2028
- Table 37 Forecast Sales in Full-Service Restaurants by Category: Foodservice Value 2023-2028
- Table 38 Forecast Full-Service Restaurants by Category: % Units/Outlets Growth 2023-2028
- Table 39 Forecast Sales in Full-Service Restaurants by Category: % Transaction Growth 2023-2028
- Table 40 Forecast Sales in Full-Service Restaurants by Category: % Foodservice Value Growth 2023-2028

Limited-Service Restaurants in Australia

KEY DATA FINDINGS

2023 DEVELOPMENTS

Impact of higher cost of living felt throughout limited-service restaurants

Chains rely on special offers and budget menus to keep business flowing

Strong expansion for Asian limited-service restaurants amidst high inflation

PROSPECTS AND OPPORTUNITIES

Possible advantages to first party delivery and a transition away from third party services Sustainability will continue to play a key role in player innovation Foodservice has strong potential in convenience stores

- Table 41 Limited-Service Restaurants by Category: Units/Outlets 2018-2023
- Table 42 Sales in Limited-Service Restaurants by Category: Number of Transactions 2018-2023
- Table 43 Sales in Limited-Service Restaurants by Category: Foodservice Value 2018-2023
- Table 44 Limited-Service Restaurants by Category: % Units/Outlets Growth 2018-2023
- Table 45 Sales in Limited-Service Restaurants by Category: % Transaction Growth 2018-2023

- Table 46 Sales in Limited-Service Restaurants by Category: % Foodservice Value Growth 2018-2023
- Table 47 GBO Company Shares in Chained Limited-Service Restaurants: % Foodservice Value 2019-2023
- Table 48 GBN Brand Shares in Chained Limited-Service Restaurants: % Foodservice Value 2020-2023
- Table 49 Forecast Limited-Service Restaurants by Category: Units/Outlets 2023-2028
- Table 50 Forecast Sales in Limited-Service Restaurants by Category: Number of Transactions 2023-2028
- Table 51 Forecast Sales in Limited-Service Restaurants by Category: Foodservice Value 2023-2028
- Table 52 Forecast Limited-Service Restaurants by Category: % Units/Outlets Growth 2023-2028
- Table 53 Forecast Sales in Limited-Service Restaurants by Category: % Transaction Growth 2023-2028
- Table 54 Forecast Sales in Limited-Service Restaurants by Category: % Foodservice Value Growth 2023-2028

Self-Service Cafeterias in Australia

KEY DATA FINDINGS

2023 DEVELOPMENTS

Ikea continues to comprise majority of value sales in self-service cafeterias
Ikea Restaurant to finally launch its plant-based hot dogs in Australia
Special Lunar New Year meal by Ikea proves to be a clever marketing strategy

PROSPECTS AND OPPORTUNITIES

Ikea to consolidate its share as independent self-service cafeterias face closures

Exploring themed limited-time offers to engage with more customers

Ikea to continue expanding its plant-based range of foods

CATEGORY DATA

- Table 55 Self-Service Cafeterias: Units/Outlets 2018-2023
- Table 56 Sales in Self-Service Cafeterias: Number of Transactions 2018-2023
- Table 57 Sales in Self-Service Cafeterias: Foodservice Value 2018-2023
- Table 58 Sales in Self-Service Cafeterias: % Units/Outlets Growth 2018-2023
- Table 59 Sales in Self-Service Cafeterias: % Transaction Growth 2018-2023
- Table 60 Sales in Self-Service Cafeterias: % Foodservice Value Growth 2018-2023
- Table 61 GBO Company Shares in Chained Self-Service Cafeterias: % Foodservice Value 2019-2023
- Table 62 GBN Brand Shares in Chained Self-Service Cafeterias: % Foodservice Value 2020-2023
- Table 63 Forecast Self-Service Cafeterias: Units/Outlets 2023-2028
- Table 64 Forecast Sales in Self-Service Cafeterias: Number of Transactions 2023-2028
- Table 65 Forecast Sales in Self-Service Cafeterias: Foodservice Value 2023-2028
- Table 66 Forecast Self-Service Cafeterias: % Units/Outlets Growth 2023-2028
- Table 67 Forecast Sales in Self-Service Cafeterias: % Transaction Growth 2023-2028
- Table 68 Forecast Sales in Self-Service Cafeterias: % Foodservice Value Growth 2023-2028

Street Stalls/Kiosks in Australia

KEY DATA FINDINGS

2023 DEVELOPMENTS

Inflation-led 2023 slows recovery of street stalls/kiosks

Social media marketing is best avenue for exposure in current market

Street stalls/kiosks remains a niche channel in overall consumer foodservice

PROSPECTS AND OPPORTUNITIES

Chained street stalls/kiosks set to lose further ground Independent operators predicted to grow over the forecast period Events and seasonal celebrations key areas for growth

- Table 69 Street Stalls/Kiosks: Units/Outlets 2018-2023
- Table 70 Sales in Street Stalls/Kiosks: Number of Transactions 2018-2023
- Table 71 Sales in Street Stalls/Kiosks: Foodservice Value 2018-2023
- Table 72 Street Stalls/Kiosks: % Units/Outlets Growth 2018-2023
- Table 73 Sales in Street Stalls/Kiosks: % Transaction Growth 2018-2023
- Table 74 Sales in Street Stalls/Kiosks: % Foodservice Value Growth 2018-2023
- Table 75 GBO Company Shares in Chained Street Stalls/Kiosks: % Foodservice Value 2019-2023
- Table 76 GBN Brand Shares in Chained Street Stalls/Kiosks: % Foodservice Value 2020-2023
- Table 77 Forecast Street Stalls/Kiosks: Units/Outlets 2023-2028
- Table 78 Forecast Sales in Street Stalls/Kiosks: Number of Transactions 2023-2028
- Table 79 Forecast Sales in Street Stalls/Kiosks: Foodservice Value 2023-2028
- Table 80 Forecast Street Stalls/Kiosks: % Units/Outlets Growth 2023-2028
- Table 81 Forecast Sales in Street Stalls/Kiosks: % Transaction Growth 2023-2028
- Table 82 Forecast Sales in Street Stalls/Kiosks: % Foodservice Value Growth 2023-2028

Consumer Foodservice By Location in Australia

KEY DATA FINDINGS

2023 DEVELOPMENTS

Retail growth stagnates amid changing consumer habits during high inflation period Steady flow of international visitors keep travel and lodging locations steady

PROSPECTS AND OPPORTUNITIES

Opportunity for further growth of consumer foodservice through retail Revolutionising the convenience store experience for customers

- Table 83 Consumer Foodservice by Location: Units/Outlets 2018-2023
- Table 84 Sales in Consumer Foodservice by Location: Number of Transactions 2018-2023
- Table 85 Sales in Consumer Foodservice by Location: Foodservice Value 2018-2023
- Table 86 Consumer Foodservice by Location: % Units/Outlets Growth 2018-2023
- Table 87 Sales in Consumer Foodservice by Location: % Transaction Growth 2018-2023
- Table 88 Sales in Consumer Foodservice by Location: % Foodservice Value Growth 2018-2023
- Table 89 Consumer Foodservice through Standalone: Units/Outlets 2018-2023
- Table 90 Sales in Consumer Foodservice through Standalone: Number of Transactions 2018-2023
- Table 91 Sales in Consumer Foodservice through Standalone: Foodservice Value 2018-2023
- Table 92 Consumer Foodservice through Standalone: % Units/Outlets Growth 2018-2023
- Table 93 Sales in Consumer Foodservice through Standalone: % Transaction Growth 2018-2023
- Table 94 Sales in Consumer Foodservice through Standalone: % Foodservice Value Growth 2018-2023
- Table 95 Consumer Foodservice through Leisure: Units/Outlets 2018-2023
- Table 96 Sales in Consumer Foodservice through Leisure: Number of Transactions 2018-2023
- Table 97 Sales in Consumer Foodservice through Leisure: Foodservice Value 2018-2023
- Table 98 Consumer Foodservice through Leisure: % Units/Outlets Growth 2018-2023
- Table 99 Sales in Consumer Foodservice through Leisure: % Transaction Growth 2018-2023
- Table 100 Sales in Consumer Foodservice through Leisure: % Foodservice Value Growth 2018-2023
- Table 101 Consumer Foodservice through Retail: Units/Outlets 2018-2023
- Table 102 Sales in Consumer Foodservice through Retail: Number of Transactions 2018-2023
- Table 103 Sales in Consumer Foodservice through Retail: Foodservice Value 2018-2023
- Table 104 Consumer Foodservice through Retail: % Units/Outlets Growth 2018-2023
- Table 105 Sales in Consumer Foodservice through Retail: % Transaction Growth 2018-2023
- Table 106 Sales in Consumer Foodservice through Retail: % Foodservice Value Growth 2018-2023
- Table 107 Consumer Foodservice through Lodging: Units/Outlets 2018-2023

- Table 108 Sales in Consumer Foodservice through Lodging: Number of Transactions 2018-2023
- Table 109 Sales in Consumer Foodservice through Lodging: Foodservice Value 2018-2023
- Table 110 Consumer Foodservice through Lodging: % Units/Outlets Growth 2018-2023
- Table 111 Sales in Consumer Foodservice through Lodging: % Transaction Growth 2018-2023
- Table 112 Sales in Consumer Foodservice through Lodging: % Foodservice Value Growth 2018-2023
- Table 113 Consumer Foodservice through Travel: Units/Outlets 2018-2023
- Table 114 Sales in Consumer Foodservice through Travel: Number of Transactions 2018-2023
- Table 115 Sales in Consumer Foodservice through Travel: Foodservice Value 2018-2023
- Table 116 Consumer Foodservice through Travel: % Units/Outlets Growth 2018-2023
- Table 117 Sales in Consumer Foodservice through Travel: % Transaction Growth 2018-2023
- Table 118 Sales in Consumer Foodservice through Travel: % Foodservice Value Growth 2018-2023
- Table 119 Forecast Consumer Foodservice by Location: Units/Outlets 2023-2028
- Table 120 Forecast Sales in Consumer Foodservice by Location: Number of Transactions 2023-2028
- Table 121 Forecast Sales in Consumer Foodservice by Location: Foodservice Value 2023-2028
- Table 122 Forecast Consumer Foodservice by Location: % Units/Outlets Growth 2023-2028
- Table 123 Forecast Sales in Consumer Foodservice by Location: % Transaction Growth 2023-2028
- Table 124 Forecast Sales in Consumer Foodservice by Location: % Foodservice Value Growth 2023-2028
- Table 125 Forecast Consumer Foodservice through Standalone: Units/Outlets 2023-2028
- Table 126 Forecast Sales in Consumer Foodservice through Standalone: Number of Transactions 2023-2028
- Table 127 Forecast Sales in Consumer Foodservice through Standalone: Foodservice Value 2023-2028
- Table 128 Forecast Consumer Foodservice through Standalone: % Units/Outlets Growth 2023-2028
- Table 129 Forecast Sales in Consumer Foodservice through Standalone: % Transaction Growth 2023-2028
- Table 130 Forecast Sales in Consumer Foodservice through Standalone: % Foodservice Value Growth 2023-2028
- Table 131 Forecast Consumer Foodservice through Leisure: Units/Outlets 2023-2028
- Table 132 Forecast Sales in Consumer Foodservice through Leisure: Number of Transactions 2023-2028
- Table 133 Forecast Sales in Consumer Foodservice through Leisure: Foodservice Value 2023-2028
- Table 134 Forecast Consumer Foodservice through Leisure: % Units/Outlets Growth 2023-2028
- Table 135 Forecast Sales in Consumer Foodservice through Leisure: % Transaction Growth 2023-2028
- Table 136 Forecast Sales in Consumer Foodservice through Leisure: % Foodservice Value Growth 2023-2028
- Table 137 Forecast Consumer Foodservice through Retail: Units/Outlets 2023-2028
- Table 138 Forecast Sales in Consumer Foodservice through Retail: Number of Transactions 2023-2028
- Table 139 Forecast Sales in Consumer Foodservice through Retail: Foodservice Value 2023-2028
- Table 140 Forecast Consumer Foodservice through Retail: % Units/Outlets Growth 2023-2028
- Table 141 Forecast Sales in Consumer Foodservice through Retail: % Transaction Growth 2023-2028
- Table 142 Forecast Sales in Consumer Foodservice through Retail: % Foodservice Value Growth 2023-2028
- Table 143 Forecast Consumer Foodservice through Lodging: Units/Outlets 2023-2028
- Table 144 Forecast Sales in Consumer Foodservice through Lodging: Number of Transactions 2023-2028
- Table 145 Forecast Sales in Consumer Foodservice through Lodging: Foodservice Value 2023-2028
- Table 146 Forecast Consumer Foodservice through Lodging: % Units/Outlets Growth 2023-2028
- Table 147 Forecast Sales in Consumer Foodservice through Lodging: % Transaction Growth 2023-2028
- Table 148 Forecast Sales in Consumer Foodservice through Lodging: % Foodservice Value Growth 2023-2028
- Table 149 Forecast Consumer Foodservice through Travel: Units/Outlets 2023-2028
- Table 150 Forecast Sales in Consumer Foodservice through Travel: Number of Transactions 2023-2028
- Table 151 Forecast Sales in Consumer Foodservice through Travel: Foodservice Value 2023-2028
- Table 152 Forecast Consumer Foodservice through Travel: % Units/Outlets Growth 2023-2028
- Table 153 Forecast Sales in Consumer Foodservice through Travel: % Transaction Growth 2023-2028
- Table 154 Forecast Sales in Consumer Foodservice through Travel: % Foodservice Value Growth 2023-2028

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-australia/report.