

Consumer Foodservice in South Africa

Market Direction | 2024-02-12 | 92 pages | Euromonitor

AVAILABLE LICENSES:

- Single User Licence €1750.00
- Multiple User License (1 Site) €3500.00
- Multiple User License (Global) €5250.00

Report description:

The trading environment in South Africa paints a bleak picture; post-pandemic recovery hindered by deteriorating local economic conditions, including erratic electricity supply, weak growth and high levels of inflation. South Africa's food price inflation has come down from a high of 13.9% in April 2023, but it remained high at 11.8% in May 2023.

Euromonitor International's Consumer Foodservice in South Africa report offers a comprehensive guide to the size and shape of the market at a national level. It provides foodservice sales, the number of outlets and the number of transactions by sector, allowing you to identify the foodservice sectors driving growth. It identifies the leading companies, the leading brands and offers strategic analysis of key factors influencing the market - be they eating habits, lifestyle changes, tourism spending or legislative issues. Forecasts to 2028 illustrate how the market is set to change.

Product coverage: Consumer Foodservice by Fulfillment, Consumer Foodservice by Location, Consumer Foodservice by Ordering Platform, Consumer Foodservice by Type.

Data coverage: market sizes (historic and forecasts), company shares, brand shares and distribution data.

Why buy this report?

- * Get a detailed picture of the Consumer Foodservice market;
- * Pinpoint growth sectors and identify factors driving change;
- * Understand the competitive environment, the market's major players and leading brands;
- * Use five-year forecasts to assess how the market is predicted to develop.

Euromonitor International has over 40 years' experience of publishing market research reports, business reference books and online information systems. With offices in London, Chicago, Singapore, Shanghai, Vilnius, Dubai, Cape Town, Santiago, Sydney, Tokyo and Bangalore and a network of over 800 analysts worldwide, Euromonitor International has a unique capability to develop reliable information resources to help drive informed strategic planning.

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scott-international.com

www.scott-international.com

Table of Contents:

Consumer Foodservice in South Africa

Euromonitor International

February 2024

List Of Contents And Tables

CONSUMER FOODSERVICE IN SOUTH AFRICA

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

LIMITED-SERVICE RESTAURANTS IN SOUTH AFRICA

KEY DATA FINDINGS

2023 DEVELOPMENTS

Increase in loadshedding leads to greater number of consumers eating out

Change in eating out occasions due to higher prices and changing consumer lifestyles

Local flavours are increasingly prevalent on South African limited-service menus

PROSPECTS AND OPPORTUNITIES

Technology will help attract new consumers to the channel

Focus on takeaway and delivery offerings

Chicken a favourite limited-service option among South Africans

CATEGORY DATA

Table 13 Limited-Service Restaurants by Category: Units/Outlets 2018-2023

Table 14 Sales in Limited-Service Restaurants by Category: Number of Transactions 2018-2023

Table 15 Sales in Limited-Service Restaurants by Category: Foodservice Value 2018-2023

Table 16 Limited-Service Restaurants by Category: % Units/Outlets Growth 2018-2023

Table 17 Sales in Limited-Service Restaurants by Category: % Transaction Growth 2018-2023

Table 18 Sales in Limited-Service Restaurants by Category: % Foodservice Value Growth 2018-2023

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

Table 19 GBO Company Shares in Chained Limited-Service Restaurants: % Foodservice Value 2019-2023
Table 20 GBN Brand Shares in Chained Limited-Service Restaurants: % Foodservice Value 2020-2023
Table 21 Forecast Limited-Service Restaurants by Category: Units/Outlets 2023-2028
Table 22 □Forecast Sales in Limited-Service Restaurants by Category: Number of Transactions 2023-2028
Table 23 □Forecast Sales in Limited-Service Restaurants by Category: Foodservice Value 2023-2028
Table 24 □Forecast Limited-Service Restaurants by Category: % Units/Outlets Growth 2023-2028
Table 25 □Forecast Sales in Limited-Service Restaurants by Category: % Transaction Growth 2023-2028
Table 26 □Forecast Sales in Limited-Service Restaurants by Category: % Foodservice Value Growth 2023-2028

CAFES/BARS IN SOUTH AFRICA

KEY DATA FINDINGS

2023 DEVELOPMENTS

Daytime dining offers greater growth potential in times of economic pressure

Leading cafe brand Mugg & Bean extends its format offering

Remote working offers opportunity for cafes in South Africa

PROSPECTS AND OPPORTUNITIES

Rising inflation and discretionary spending could hamper future growth

Health and wellness trend can offer growth potential for juice/smoothie bars

Updates in tech appeal to savvy consumers

CATEGORY DATA

Table 27 Cafes/Bars by Category: Units/Outlets 2018-2023

Table 28 Sales in Cafes/Bars by Category: Number of Transactions 2018-2023

Table 29 Sales in Cafes/Bars by Category: Foodservice Value 2018-2023

Table 30 Cafes/Bars by Category: % Units/Outlets Growth 2018-2023

Table 31 Sales in Cafes/Bars by Category: % Transaction Growth 2018-2023

Table 32 Sales in Cafes/Bars by Category: % Foodservice Value Growth 2018-2023

Table 33 GBO Company Shares in Chained Cafes/Bars: % Foodservice Value 2019-2023

Table 34 GBN Brand Shares in Chained Cafes/Bars: % Foodservice Value 2020-2023

Table 35 Forecast Cafes/Bars by Category: Units/Outlets 2023-2028

Table 36 □Forecast Sales in Cafes/Bars by Category: Number of Transactions 2023-2028

Table 37 □Forecast Sales in Cafes/Bars by Category: Foodservice Value 2023-2028

Table 38 □Forecast Cafes/Bars by Category: % Units/Outlets Growth 2023-2028

Table 39 □Forecast Sales in Cafes/Bars by Category: % Transaction Growth 2023-2028

Table 40 □Forecast Sales in Cafes/Bars by Category: % Foodservice Value Growth 2023-2028

FULL-SERVICE RESTAURANTS IN SOUTH AFRICA

KEY DATA FINDINGS

2023 DEVELOPMENTS

Rising costs result in a shift to smaller format outlets

Boost in tourism numbers benefits foodservice operators

Health and wellness trend leads to greater variety on menus

PROSPECTS AND OPPORTUNITIES

Economic crisis will continue to influence price-sensitive consumers over the forecast period

Some consumers will pay more for a premium experience

Digital transformation appeals to a broader consumer base

CATEGORY DATA

Table 41 Full-Service Restaurants by Category: Units/Outlets 2018-2023

Table 42 Sales in Full-Service Restaurants by Category: Number of Transactions 2018-2023

Table 43 Sales in Full-Service Restaurants by Category: Foodservice Value 2018-2023

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

Table 44 Full-Service Restaurants by Category: % Units/Outlets Growth 2018-2023
Table 45 Sales in Full-Service Restaurants by Category: % Transaction Growth 2018-2023
Table 46 Sales in Full-Service Restaurants by Category: % Foodservice Value Growth 2018-2023
Table 47 GBO Company Shares in Chained Full-Service Restaurants: % Foodservice Value 2019-2023
Table 48 GBN Brand Shares in Chained Full-Service Restaurants: % Foodservice Value 2020-2023
Table 49 Forecast Full-Service Restaurants by Category: Units/Outlets 2023-2028
Table 50 □Forecast Sales in Full-Service Restaurants by Category: Number of Transactions 2023-2028
Table 51 □Forecast Sales in Full-Service Restaurants by Category: Foodservice Value 2023-2028
Table 52 □Forecast Full-Service Restaurants by Category: % Units/Outlets Growth 2023-2028
Table 53 □Forecast Sales in Full-Service Restaurants by Category: % Transaction Growth 2023-2028
Table 54 □Forecast Sales in Full-Service Restaurants by Category: % Foodservice Value Growth 2023-2028

SELF-SERVICE CAFETERIAS IN SOUTH AFRICA

2023 DEVELOPMENTS

STREET STALLS/KIOSKS IN SOUTH AFRICA

KEY DATA FINDINGS

2023 DEVELOPMENTS

Chained operators focus on expanding into channel due to rising costs
Independent street stalls/kiosks upscale their offerings with artisanal fare
Street stalls/kiosks benefit from updates in payment options

PROSPECTS AND OPPORTUNITIES

Competition to intensify as new chained brands enter the channel
Increase in tourism benefits street stalls/kiosks despite inflationary pressures

CATEGORY DATA

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

CONSUMER FOODSERVICE BY LOCATION IN SOUTH AFRICA

KEY DATA FINDINGS

2023 DEVELOPMENTS

Travel, leisure and lodging sales boosted by surge in tourists to South Africa
Dark kitchens boost sales potential of full-service restaurants

PROSPECTS AND OPPORTUNITIES

Growth in local and foreign tourism to boost sales
Standalone format remains key for consumer foodservice

CATEGORY DATA

Table 69 Consumer Foodservice by Location: Units/Outlets 2018-2023

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

Table 70 Sales in Consumer Foodservice by Location: Number of Transactions 2018-2023

Table 71 Sales in Consumer Foodservice by Location: Foodservice Value 2018-2023

Table 72 Consumer Foodservice by Location: % Units/Outlets Growth 2018-2023

Table 73 Sales in Consumer Foodservice by Location: % Transaction Growth 2018-2023

Table 74 Sales in Consumer Foodservice by Location: % Foodservice Value Growth 2018-2023

Table 75 Consumer Foodservice through Standalone: Units/Outlets 2018-2023

Table 76 Sales in Consumer Foodservice through Standalone: Number of Transactions 2018-2023

Table 77 Sales in Consumer Foodservice through Standalone: Foodservice Value 2018-2023

Table 78 □Consumer Foodservice through Standalone: % Units/Outlets Growth 2018-2023

Table 79 □Sales in Consumer Foodservice through Standalone: % Transaction Growth 2018-2023

Table 80 □Sales in Consumer Foodservice through Standalone: % Foodservice Value Growth 2018-2023

Table 81 □Consumer Foodservice through Leisure: Units/Outlets 2018-2023

Table 82 □Sales in Consumer Foodservice through Leisure: Number of Transactions 2018-2023

Table 83 □Sales in Consumer Foodservice through Leisure: Foodservice Value 2018-2023

Table 84 □Consumer Foodservice through Leisure: % Units/Outlets Growth 2018-2023

Table 85 □Sales in Consumer Foodservice through Leisure: % Transaction Growth 2018-2023

Table 86 □Sales in Consumer Foodservice through Leisure: % Foodservice Value Growth 2018-2023

Table 87 □Consumer Foodservice through Retail: Units/Outlets 2018-2023

Table 88 □Sales in Consumer Foodservice through Retail: Number of Transactions 2018-2023

Table 89 □Sales in Consumer Foodservice through Retail: Foodservice Value 2018-2023

Table 90 □Consumer Foodservice through Retail: % Units/Outlets Growth 2018-2023

Table 91 □Sales in Consumer Foodservice through Retail: % Transaction Growth 2018-2023

Table 92 □Sales in Consumer Foodservice through Retail: % Foodservice Value Growth 2018-2023

Table 93 □Consumer Foodservice through Lodging: Units/Outlets 2018-2023

Table 94 □Sales in Consumer Foodservice through Lodging: Number of Transactions 2018-2023

Table 95 □Sales in Consumer Foodservice through Lodging: Foodservice Value 2018-2023

Table 96 □Consumer Foodservice through Lodging: % Units/Outlets Growth 2018-2023

Table 97 □Sales in Consumer Foodservice through Lodging: % Transaction Growth 2018-2023

Table 98 □Sales in Consumer Foodservice through Lodging: % Foodservice Value Growth 2018-2023

Table 99 □Consumer Foodservice through Travel: Units/Outlets 2018-2023

Table 100 □Sales in Consumer Foodservice through Travel: Number of Transactions 2018-2023

Table 101 □Sales in Consumer Foodservice through Travel: Foodservice Value 2018-2023

Table 102 □Consumer Foodservice through Travel: % Units/Outlets Growth 2018-2023

Table 103 □Sales in Consumer Foodservice through Travel: % Transaction Growth 2018-2023

Table 104 □Sales in Consumer Foodservice through Travel: % Foodservice Value Growth 2018-2023

Table 105 □Forecast Consumer Foodservice by Location: Units/Outlets 2023-2028

Table 106 □Forecast Sales in Consumer Foodservice by Location: Number of Transactions 2023-2028

Table 107 □Forecast Sales in Consumer Foodservice by Location: Foodservice Value 2023-2028

Table 108 □Forecast Consumer Foodservice by Location: % Units/Outlets Growth 2023-2028

Table 109 □Forecast Sales in Consumer Foodservice by Location: % Transaction Growth 2023-2028

Table 110 □Forecast Sales in Consumer Foodservice by Location: % Foodservice Value Growth 2023-2028

Table 111 □Forecast Consumer Foodservice through Standalone: Units/Outlets 2023-2028

Table 112 □Forecast Sales in Consumer Foodservice through Standalone: Number of Transactions 2023-2028

Table 113 □Forecast Sales in Consumer Foodservice through Standalone: Foodservice Value 2023-2028

Table 114 □Forecast Consumer Foodservice through Standalone: % Units/Outlets Growth 2023-2028

Table 115 □Forecast Sales in Consumer Foodservice through Standalone: % Transaction Growth 2023-2028

Table 116 □Forecast Sales in Consumer Foodservice through Standalone: % Foodservice Value Growth 2023-2028

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

Table 117 □Forecast Consumer Foodservice through Leisure: Units/Outlets 2023-2028
Table 118 □Forecast Sales in Consumer Foodservice through Leisure: Number of Transactions 2023-2028
Table 119 □Forecast Sales in Consumer Foodservice through Leisure: Foodservice Value 2023-2028
Table 120 □Forecast Consumer Foodservice through Leisure: % Units/Outlets Growth 2023-2028
Table 121 □Forecast Sales in Consumer Foodservice through Leisure: % Transaction Growth 2023-2028
Table 122 □Forecast Sales in Consumer Foodservice through Leisure: % Foodservice Value Growth 2023-2028
Table 123 □Forecast Consumer Foodservice through Retail: Units/Outlets 2023-2028
Table 124 □Forecast Sales in Consumer Foodservice through Retail: Number of Transactions 2023-2028
Table 125 □Forecast Sales in Consumer Foodservice through Retail: Foodservice Value 2023-2028
Table 126 □Forecast Consumer Foodservice through Retail: % Units/Outlets Growth 2023-2028
Table 127 □Forecast Sales in Consumer Foodservice through Retail: % Transaction Growth 2023-2028
Table 128 □Forecast Sales in Consumer Foodservice through Retail: % Foodservice Value Growth 2023-2028
Table 129 □Forecast Consumer Foodservice through Lodging: Units/Outlets 2023-2028
Table 130 □Forecast Sales in Consumer Foodservice through Lodging: Number of Transactions 2023-2028
Table 131 □Forecast Sales in Consumer Foodservice through Lodging: Foodservice Value 2023-2028
Table 132 □Forecast Consumer Foodservice through Lodging: % Units/Outlets Growth 2023-2028
Table 133 □Forecast Sales in Consumer Foodservice through Lodging: % Transaction Growth 2023-2028
Table 134 □Forecast Sales in Consumer Foodservice through Lodging: % Foodservice Value Growth 2023-2028
Table 135 □Forecast Consumer Foodservice through Travel: Units/Outlets 2023-2028
Table 136 □Forecast Sales in Consumer Foodservice through Travel: Number of Transactions 2023-2028
Table 137 □Forecast Sales in Consumer Foodservice through Travel: Foodservice Value 2023-2028
Table 138 □Forecast Consumer Foodservice through Travel: % Units/Outlets Growth 2023-2028
Table 139 □Forecast Sales in Consumer Foodservice through Travel: % Transaction Growth 2023-2028
Table 140 □Forecast Sales in Consumer Foodservice through Travel: % Foodservice Value Growth 2023-2028

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

Consumer Foodservice in South Africa

Market Direction | 2024-02-12 | 92 pages | Euromonitor

To place an Order with Scotts International:

- Print this form
- Complete the relevant blank fields and sign
- Send as a scanned email to support@scott's-international.com

ORDER FORM:

Select license	License	Price
	Single User Licence	€1750.00
	Multiple User License (1 Site)	€3500.00
	Multiple User License (Global)	€5250.00
		VAT
		Total

*Please circle the relevant license option. For any questions please contact support@scott's-international.com or 0048 603 394 346.

** VAT will be added at 23% for Polish based companies, individuals and EU based companies who are unable to provide a valid EU Vat Numbers.

Email*	<input type="text"/>	Phone*	<input type="text"/>
First Name*	<input type="text"/>	Last Name*	<input type="text"/>
Job title*	<input type="text"/>		
Company Name*	<input type="text"/>	EU Vat / Tax ID / NIP number*	<input type="text"/>
Address*	<input type="text"/>	City*	<input type="text"/>
Zip Code*	<input type="text"/>	Country*	<input type="text"/>
		Date	<input type="text" value="2026-03-10"/>
		Signature	<input type="text"/>

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scott's-international.com

www.scott's-international.com