

Australia Foodservice - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts 2017 - 2029

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Report description:

The Australia Foodservice Market size is estimated at USD 61.98 billion in 2024, and is expected to reach USD 101.68 billion by 2029, growing at a CAGR of 10.41% during the forecast period (2024-2029).

The number of restaurant visits per month grew as a result of the national spread of fast food companies.

- The overall market witnessed a hike of 30.7% in terms of sales value from 2019 to 2022. Owing to the increasing number of international tourist arrivals reaching over 1 million in 2022, consumer spending on dining out increased to USD 160 per week in 2022. However, FSR restaurants observed a significant growth of 18.14% in sales value during 2019-2022. The segment's growth can be attributed to the introduction of vegan, low-sugar, gluten-free options to traditional Asian dishes by restaurants.
- Quick service restaurants accounted for the major share of the market, and they are further projected to witness a CAGR of 9.18%, by value, during the forecast period (2023-2029). Due to the increasing consumption of fast food in the country, more than 80 million people visit fast-food restaurants every month. Coles Group spends USD 15.2 million on digital ads, while Yum! Brands, which owns KFC, Pizza Hut, and Taco Bell, spends USD 14.9 million on its key marketing strategy.
- Cloud kitchens are projected to witness the fastest CAGR of 38.64%, by value, during the forecast period. In 2022, delivery accounted for 30% of total restaurant sales, and over 5.5 million Australian consumers aged 14+ (26.5%) ordered food online in Australia in 2021.
- However, cafes & bars also accounted for a prominent market share in 2022. Owing to the high consumption of coffee in the country, as around 75% of the population preferred to have coffee once or twice a day in 2022, people aged between 25-34 consumed most coffee in Australia. However, in 2021, around 78% of Australians considered taste and quality important when drinking coffee, which fueled the sales value of specialist coffee and tea shops in the country.

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Australia Food Service Market Trends

Increased demand for fast food drives expansion of quick service restaurants in Australia

- The total number of outlets increased by around 3,500 restaurants in 2022 compared to 2017. Owing to the high number of franchisee establishments, Australia had over 1,100 franchisors, 65,000 franchise units, and 8,000 company-owned units in 2022. The number of orders and consumer spending in the country also increased to USD 33 per month.

- Quick service accounted for more than 30,750 restaurants in 2022. The high demand for popular fast-food items like pizza, chicken nuggets/meatballs, burgers, and potato chips/fries increased fast-food consumption, increasing the number of orders per day to 174 in 2022, up by around 30 from 2017. Owing to this trend, Coles Group, Subway, and McDonald's, the largest food chains in Australia, have expanded their footprint in the country. For instance, as of 2022, Coles Group had the highest number of locations, with 1,545 locations across eight states and territories. In 2022, Subway had 1,214, McDonald's had 1,034, Domino's had 716, and KFC had 712 locations in Australia.

- Full service outlets hold the second major share in the market, with more than 23,899 restaurants in 2022. Full service restaurants provide more customer satisfaction by attracting customers with their menu options. The provision of a broad range of dishes by full service chains enhanced the value of the on-premise eating experience. The demand for popular dishes like avocado rolls, pad thai, spag bol, miso soup, rice, Indian curries, and other international food has recently increased. However, people prefer to dine out in restaurants with different music events, themes, and something unique.

Australians spend an average of USD 60 per week on fast food, with QSR accounting for the majority of sales value

- The average order value increased by 14.37% from 2017 to 2022, reaching USD 16.32 in 2022. Owing to the rising inflation rate, which increased by an average of 5-6% from 2017 to 2022, the number of orders per year increased from around 200,000 in 2017 to more than 425,501 per outlet in 2022. Owing to the high spending, Australians spend an average of USD 40 per week on food delivery through apps such as Uber Eats, Deliveroo, and DoorDash.

- QSR accounted for the major share of sales in 2022 with a low average order value. However, the average Australian spending was high, which amounted to USD 60 on fast food per week. Popular QSR dishes preferred by Australians are pizza (USD 10.63 per 300 g), chicken nuggets/meatballs (USD 6 per 300 g), burgers (USD 9.3 per 250 g), and potato fries/chips (USD 5.32 per 250 g). However, the average order value through cloud kitchens is higher than QSR as most people order lunch, dinner, and other meals, and the fuel prices are also high in the country.

- On average, Australians consumed around 2 kg of coffee per person in 2021. Three in four Australians (75%) consume at least one cup of coffee daily, and of those, 28% have three or more cups daily. However, popular servings at cafes & bars in 2022 included coffee (latte/cappuccino/Americano/espresso), which cost around USD 2.3 per 150 mL, hot chocolate (USD 3 per 150 mL), milk tea (USD 2.6 per 150 mL), juices (USD 5.3 per 300 mL), smoothies (USD 6.3 per 300 mL), wine (USD 52 per 400 mL), and craft/draught beer (USD 6.3 per 331 mL). These are consumed in high proportions in the country.

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Australia Food Service Industry Overview

The Australia Foodservice Market is fragmented, with the top five companies occupying 3.91%. The major players in this market are Competitive Foods Australia, Craveable Brands, Domino's Pizza Enterprises Ltd., McDonald's Corporation and Yum! Brands, Inc. (sorted alphabetically).

Additional Benefits:

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

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