

South Africa Foodservice - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)

Market Report | 2025-04-28 | 182 pages | Mordor Intelligence

AVAILABLE LICENSES:

- Single User License \$4750.00
- Team License (1-7 Users) \$5250.00
- Site License \$6500.00
- Corporate License \$8750.00

Report description:

The South Africa Foodservice Market size is estimated at 10.16 billion USD in 2025, and is expected to reach 20.11 billion USD by 2030, growing at a CAGR of 14.63% during the forecast period (2025-2030).

The rising popularity of food delivery platforms like Mr.D and Uber Eats is boosting the market growth

- Quick service restaurants hold a significant share of the market. During the study period, the quick service restaurants segment is expected to register a CAGR of 7.61% by value. The growth of food delivery services such as Mr. D Food and Uber Eats in South Africa has made it easier for QSRs to reach customers who cannot visit their physical outlets. Mr. D Food controls 30% of the South African food delivery industry, while Uber Eats holds a 25% share. This has increased the ability of QSRs to expand their delivery capabilities and reach more customers. Processed chicken, burgers, processed fish, pizza, and sandwiches, among others, are some of the main fast food items gaining popularity in the South African market.
- FSR holds the second-largest share of the market. In the FSR segment, the Asian cuisine sub-segment is expanding and is projected to register a CAGR of 13.58% by value in the forecast period. South Africa is a diverse country with a multicultural population. This exposure has increased appreciation and demand for Asian flavors and dishes. There has been an increase in migration to South Africa from Asian countries, such as China and India. Indian South Africans comprise around 2.5% of the South African population in 2023, amounting to approximately 1.6 million people. This migration has led to the opening of more Asian restaurants in South Africa.
- Cloud kitchens are projected to register a CAGR of 18.76% by value in the forecast period. Cloud kitchens offer a wide variety of cuisine options to cater to the diverse tastes of South African consumers. Popular cloud kitchens such as Kitchens Dot Com, operating in Johannesburg and Cape Town, and GhostKitchenZA have partnered with established restaurants to provide

Scotts International. EU Vat number: PL 6772247784

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

www.scott-international.com

delivery-only menus under different brand names.

South Africa Foodservice Market Trends

Quick service restaurants remain popular in South Africa, with international and local chains dominating the market, led by McDonald's, KFC, Burger King, Chicken Licken, and Chesa Nyama

- Quick-service restaurants held a significant share of the market in terms of the number of outlets, amounting to 79.20%, in 2022. Quick-service chains that offer burgers, pizza, fried chicken, and sandwiches are very popular in South Africa, including McDonald's, KFC, and Burger King, which have over 300, 1,000, and 97 outlets, respectively. In addition to international chains, there are many popular local fast food brands in South Africa, such as Chesa Nyama and Chicken Licken, which is known for its crispy fried chicken and garlic sauce. Cafes and bar outlets are the fastest-growing in the market in terms of the number of outlets, projected to register a growth of 2.60% in the forecast period. However, the demand for freshly brewed coffee is on the rise.
- The country records around a 2.3% average annual growth rate in coffee consumption. Brands with strong identities are most likely to thrive and grow. This is evidenced by the development of coffee chains that have grown from a single store into a franchise and further into a global brand spreading from Cape Town to deep into Africa. Many cafes in South Africa are also catering to the increasing demand for healthy food options by offering vegan and vegetarian options on their menus. Cloud kitchen is the second fastest-growing segment in the market in terms of the number of outlets. The segment is projected to register a CAGR of 9.04% in the forecast period. The growth of cloud kitchens in South Africa is in line with the increasing popularity of food delivery services such as Uber Eats, Mr. D Food, and OrderIn. These services have led to an increase in demand for food delivery-only operations. Many cloud kitchens have emerged in South Africa in recent years, especially in cities like Johannesburg and Cape Town. Some of the popular cloud kitchen brands in South Africa include Knead Bakery, The Kitchen Collective, and On-Demand Kitchens.

Asian cuisine driving demand for full-service restaurants in South Africa, with popular dishes including braai, baboti, and bunny chow

- The average order value was observed to be the highest among full service restaurants in 2022 compared to other foodservice types, with a price of USD 37.7. The demand for FSR in the country is driven by Asian cuisine, which contributed significantly to the South African foodservice market. Beluga, Taste of Thai, and Bao Down are some of the country's popular Asian restaurants. Popular dishes offered by FSR outlets in the country are Braai, Baboti, and Bunny Chow, which were priced at USD 8.6, USD 7.25, and USD 7.75 per 300 grams, respectively, in 2022.
- Cloud kitchens are expected to grow at a faster rate in the market. The average order value of cloud kitchens was USD 13.8 in 2022. Food delivery apps, such as Uber Eats and Mr. D Food, which are strong forces in the food delivery industry, have enabled the cloud kitchen model to scale better. For instance, Mr. D Food has over 5 million downloads and over 1 million active users. Similarly, Uber Eats has a 25% market share in South Africa and is anticipated to see a 40% revenue increase by 2027. This has created a significant opportunity for food businesses to expand their reach. Popular cloud kitchens in the country are KitchenCo.,

Scotts International. EU Vat number: PL 6772247784

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

www.scotts-international.com

Kitchen Maestro, and Food Junction. The average order value of quick service restaurants increased by 13.27% from 2017 to 2022. The entry of various national and international players in the QSR segment has significantly boosted the chained quick service fast food outlet market due to the rapidly expanding middle-income group and increased consumer spending on fast food. Popular dishes offered by QSR outlets in the country include Burgers, Pizza, and Bitlong, which were priced at USD 3.25, USD 4.7, and USD 3.5 per 300 grams, respectively, in 2022.

South Africa Foodservice Industry Overview

The South Africa Foodservice Market is fragmented, with the top five companies occupying 35.69%. The major players in this market are Famous Brands Limited, McDonald's Corporation, Restaurant Brands International Inc., Spur Corporation Limited and Yum! Brands Inc. (sorted alphabetically).

Additional Benefits:

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

Table of Contents:

1 EXECUTIVE SUMMARY & KEY FINDINGS

2 REPORT OFFERS

3 INTRODUCTION

3.1 Study Assumptions & Market Definition

3.2 Scope of the Study?

3.3 Research Methodology

4 KEY INDUSTRY TRENDS

4.1 Number Of Outlets

4.2 Average Order Value

4.3 Regulatory Framework

4.3.1 South Africa

4.4 Menu Analysis

5 MARKET SEGMENTATION (includes market size in Value in USD, Forecasts up to 2030 and analysis of growth prospects)

5.1 Foodservice Type

5.1.1 Cafes & Bars

5.1.1.1 By Cuisine

5.1.1.1.1 Bars & Pubs

5.1.1.1.2 Cafes

5.1.1.1.3 Juice/Smoothie/Desserts Bars

5.1.1.1.4 Specialist Coffee & Tea Shops

5.1.2 Cloud Kitchen

5.1.3 Full Service Restaurants

5.1.3.1 By Cuisine

5.1.3.1.1 Asian

Scotts International. EU Vat number: PL 6772247784

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

www.scotts-international.com

- 5.1.3.1.2 European
- 5.1.3.1.3 Latin American
- 5.1.3.1.4 Middle Eastern
- 5.1.3.1.5 North American
- 5.1.3.1.6 Other FSR Cuisines
- 5.1.4 Quick Service Restaurants
 - 5.1.4.1 By Cuisine
 - 5.1.4.1.1 Bakeries
 - 5.1.4.1.2 Burger
 - 5.1.4.1.3 Ice Cream
 - 5.1.4.1.4 Meat-based Cuisines
 - 5.1.4.1.5 Pizza
 - 5.1.4.1.6 Other QSR Cuisines
- 5.2 Outlet
 - 5.2.1 Chained Outlets
 - 5.2.2 Independent Outlets
- 5.3 Location
 - 5.3.1 Leisure
 - 5.3.2 Lodging
 - 5.3.3 Retail
 - 5.3.4 Standalone
 - 5.3.5 Travel

6 COMPETITIVE LANDSCAPE

- 6.1 Key Strategic Moves
- 6.2 Market Share Analysis
- 6.3 Company Landscape
- 6.4 Company Profiles (includes Global Level Overview, Market Level Overview, Core Business Segments, Financials, Headcount, Key Information, Market Rank, Market Share, Products and Services, and Analysis of Recent Developments).
 - 6.4.1 Domino's Pizza Inc.
 - 6.4.2 Famous Brands Limited
 - 6.4.3 Laudian Franchise Management One Pty Ltd
 - 6.4.4 McDonald's Corporation
 - 6.4.5 Restaurant Brands International Inc.
 - 6.4.6 Roman's Pizza
 - 6.4.7 Spur Corporation Limited
 - 6.4.8 Vida e Caffè Holdings (Pty) Ltd
 - 6.4.9 Yum! Brands Inc.

7 KEY STRATEGIC QUESTIONS FOR FOODSERVICE CEOS

8 APPENDIX

- 8.1 Global Overview
 - 8.1.1 Overview
 - 8.1.2 Porter's Five Forces Framework
 - 8.1.3 Global Value Chain Analysis
 - 8.1.4 Market Dynamics (DROs)

Scotts International. EU Vat number: PL 6772247784

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

www.scotts-international.com

- 8.2 Sources & References
- 8.3 List of Tables & Figures
- 8.4 Primary Insights
- 8.5 Data Pack
- 8.6 Glossary of Terms

**South Africa Foodservice - Market Share Analysis, Industry Trends & Statistics,
Growth Forecasts (2025 - 2030)**

Market Report | 2025-04-28 | 182 pages | Mordor Intelligence

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 License	\$4750.00
	Team License (1-7 Users)	\$5250.00
	Site License	\$6500.00
	Corporate License	\$8750.00
		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="2026-03-01"/>
		Signature	

Scotts International. EU Vat number: PL 6772247784

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

www.scott's-international.com

