

New Zealand Foodservice - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2026 - 2031)

Market Report | 2026-01-16 | 90 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:

New Zealand Foodservice Market Analysis

The New Zealand Food Service Market demonstrated a valuation of USD 13.72 billion in 2025. New Zealand Food Service Market market size in 2026 is estimated at USD 14.64 billion, growing from 2025 value of USD 13.72 billion with 2031 projections showing USD 20.27 billion, growing at 6.72% CAGR over 2026-2031. This market expansion is primarily attributed to the confluence of factors, including progressive urbanization, heightened tourism activity, and the evolution of consumer preferences regarding convenience and dining experiences. The increased consumer emphasis on food quality standards, sustainability initiatives, and specialized dietary requirements has compelled food service operators to implement comprehensive menu diversification strategies and establish rigorous sourcing protocols. The persistent advancement in digital infrastructure and the systematic implementation of innovative delivery mechanisms continue to fundamentally influence the competitive landscape of New Zealand's food service market.

New Zealand Foodservice Market Trends and Insights

Growth of tourism and hospitality sector

The tourism and hospitality sector's expansion has driven significant growth in the New Zealand Food Service Market, influencing demand patterns across the country's foodservice landscape. The resumption of international travel after pandemic disruptions has increased visitor spending and demand for diverse dining experiences. Foodservice establishments in tourist hubs have

Scotts International. EU Vat number: PL 6772247784

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

www.scotts-international.com

benefited from overseas and domestic tourists seeking quality and authentic food options. This recovery has increased customer traffic in restaurants, cafes, bars, and leisure venues, while driving demand for experiential dining and innovative menus that showcase New Zealand's multicultural cuisine. For instance, according to the Statistics New Zealand, in 2024, overseas visitor arrivals to New Zealand reached 3.3 million in the December 2024 year, representing a 12% increase from the December 2023 year. This growth demonstrates strong post-pandemic recovery and indicates sustained demand for foodservice offerings in the tourism sector. The increase in international arrivals generates immediate sales growth and promotes investments in foodservice infrastructure and service improvements across tourism-focused regions.

Rising consumer preference for convenience and dining-out

The escalating consumer inclination toward convenience and out-of-home dining substantially influences the New Zealand Food Service Market. According to the Restaurant Association of New Zealand in 2023, households reported a median weekly expenditure of USD 114 on dining out, illustrating the fundamental role of food service consumption in New Zealand's consumer behavior. The market exhibits continuous expansion as consumers prioritize efficient and accessible food options that correspond to their time-constrained schedules, particularly benefiting quick-service restaurants, takeaway establishments, and delivery services. The integration of digital ordering platforms and delivery applications has enhanced food service accessibility, minimizing the requirement for extensive meal preparation or on-premises dining. Furthermore, the market expansion is reinforced by consumers' propensity toward social dining experiences and culinary diversity, manifesting in frequent patronage of cafes and restaurants, alongside sustained demand for prepared meals.

Strict food safety and compliance regulations

Regulatory requirements pertaining to food safety and compliance present substantial limitations within the New Zealand Food Service Market. The regulatory framework has undergone significant intensification, notably through the implementation of mandatory allergen labeling protocols effective February 25, 2024. These regulatory provisions necessitate the explicit identification of common allergens through bold typographic presentation on food labels, accompanied by comprehensive 'contains' declarations to ensure consumer protection. Although these measures enhance food safety protocols, they impose considerable operational challenges for foodservice establishments. Organizations must allocate resources toward implementing advanced labeling mechanisms, conducting comprehensive personnel training, and establishing robust supply chain monitoring systems to maintain regulatory compliance. These requirements generate increased operational expenditures, introduce procedural complexities, and diminish menu adaptability.

Other drivers and restraints analyzed in the detailed report include:

Expansion of delivery platforms and digital ordering drives the market
Shift toward plant-based and health-conscious menus
Supply-chain volatility and food inflation

For complete list of drivers and restraints, kindly check the Table Of Contents.

Segment Analysis

Full-Service Restaurants hold a dominant 37.92% market share, driven by consumer preference for comprehensive dining experiences that combine quality food, atmosphere, and service. The segment shows moderate growth as consumers seek premium, multicultural, and sustainable menu options. Operators are improving efficiency through digital booking systems and AI-driven service solutions. Cloud Kitchens represent the fastest-growing segment, with a projected CAGR of 8.36% from 2026 to 2031. Their growth stems from operational advantages, including reduced overhead costs and the flexibility to test new menu concepts without substantial capital investment.

Scotts International. EU Vat number: PL 6772247784

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

www.scotts-international.com

Quick-Service Restaurants (QSR) maintain their market position through technological integration, including contactless payments, self-order kiosks, and mobile ordering applications. These digital solutions help meet consumer demands for convenience and speed. Cafes and Bars represent a stable segment, supported by New Zealand's established coffee culture and social dining preferences. Statistics New Zealand reports that the number of cafes and restaurants grew from 9,006 in 2023 to 9,150 in 2024, demonstrating consistent market expansion.

Independent establishments constituted a predominant 67.95% market share within the New Zealand Food Service Market during 2025. This market representation demonstrates the prevalent consumer inclination toward locally-operated establishments that deliver standardized dining experiences and differentiated culinary offerings. These independent operations maintain established institutional relationships and implement systematic operational methodologies in addressing regional market requirements, thereby ensuring sustained consumer retention through structured service delivery frameworks.

Chained outlets, while holding a smaller market share, are expected to grow at a CAGR of 7.65% from 2026 to 2031. Major restaurant chains are expanding their presence across New Zealand by utilizing their brand recognition, operational efficiencies, and comprehensive service offerings. For instance, Popeyes, the American quick-service restaurant (QSR) chain, opened its first New Zealand location in March 2024, indicating increased investment by international brands in the market. The expansion of established chains enhances the existing independent sector, intensifying competition and driving improvements in service quality, menu options, and technology integration.

The New Zealand Food Service Market Report is Segmented by Type (Full-Service Restaurants, Quick Service Restaurants, Cloud Kitchen, and Cafes and Bars), Outlet (Chained Outlets, and Independent Outlets), Location (Standalone, Leisure, Retail, Lodging, and Travel), and Cuisine Type (Asian, European, Latin American, Middle Eastern, North American, and Other Cuisines). The Market Forecasts are Provided in Terms of Value (USD).

List of Companies Covered in this Report:

Restaurant Brands New Zealand Limited. McDonald's Corporation BurgerFuel Group Ltd Domino's Pizza, Inc. Starbucks Corporation Subway (Doctor's Associates Inc.) Inspire Brands Inc. Chicking New Zealand Columbus Coffee Hell Pizza The Coffee Club New Zealand Burger King NZ (Antares Restaurant Grp) Wendy's Hamburgers NZ St Pierre's Sushi Pita Pit New Zealand Mexicali Fresh Tank Juice Bar Mad Mex Fresh Mexican Grill Habitual Fix Coffee Culture

Additional Benefits:

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

Table of Contents:

1 INTRODUCTION

1.1 Study Assumptions and Market Definition

1.2 Scope of the Study

2 RESEARCH METHODOLOGY

3 EXECUTIVE SUMMARY

4 MARKET LANDSCAPE

Scotts International. EU Vat number: PL 6772247784

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

www.scotts-international.com

- 4.1 Market Overview
- 4.2 Market Drivers
 - 4.2.1 Growth of tourism and hospitality sector
 - 4.2.2 Rising consumer preference for convenience & dining-out
 - 4.2.3 Expansion of delivery platforms and digital ordering drives the market
 - 4.2.4 Shift toward plant-based and health-conscious menus
 - 4.2.5 Technology Integration in Restaurants
 - 4.2.6 Sustainability and Local Sourcing
- 4.3 Market Restraints
 - 4.3.1 Strict food safety and compliance regulations
 - 4.3.2 Supply-chain volatility and food inflation
 - 4.3.3 High commercial rents in prime locations
 - 4.3.4 Rising labor shortage may hamper the growth
- 4.4 Regulatory Landscape
- 4.5 Porter's Five Forces Analysis
 - 4.5.1 Threat of New Entrants
 - 4.5.2 Bargaining Power of Buyers
 - 4.5.3 Bargaining Power of Suppliers
 - 4.5.4 Threat of Substitutes
 - 4.5.5 Intensity of Competitive Rivalry

5 MARKET SIZE AND GROWTH FORECASTS (VALUE)

- 5.1 By Type
 - 5.1.1 Full-Service Restaurants
 - 5.1.2 Quick-Service-Restaurants
 - 5.1.3 Cloud Kitchen
 - 5.1.4 Cafes and Bars
- 5.2 By Outlet
 - 5.2.1 Chained Outlets
 - 5.2.2 Independent Outlets
- 5.3 By Location
 - 5.3.1 Standalone
 - 5.3.2 Leisure
 - 5.3.3 Retail
 - 5.3.4 Lodging
 - 5.3.5 Travel
- 5.4 By Cuisine Type
 - 5.4.1 Asian
 - 5.4.2 European
 - 5.4.3 Latin American
 - 5.4.4 Middle Eastern
 - 5.4.5 North American
 - 5.4.6 Other Cuisines

6 COMPETITIVE LANDSCAPE

- 6.1 Market Concentration
- 6.2 Strategic Moves

Scotts International. EU Vat number: PL 6772247784

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

www.scotts-international.com

6.3 Market Share Analysis

6.4 Company Profiles (includes Global level Overview, Market level overview, Core Segments, Financials as available, Strategic Information, Market Rank/Share for key companies, Products and Services, and Recent Developments)

6.4.1 Restaurant Brands New Zealand Limited.

6.4.2 McDonald's Corporation

6.4.3 BurgerFuel Group Ltd

6.4.4 Domino's Pizza, Inc.

6.4.5 Starbucks Corporation

6.4.6 Subway (Doctor's Associates Inc.)

6.4.7 Inspire Brands Inc.

6.4.8 Chicking New Zealand

6.4.9 Columbus Coffee

6.4.10 Hell Pizza

6.4.11 The Coffee Club New Zealand

6.4.12 Burger King NZ (Antares Restaurant Grp)

6.4.13 Wendy's Hamburgers NZ

6.4.14 St Pierre's Sushi

6.4.15 Pita Pit New Zealand

6.4.16 Mexicali Fresh

6.4.17 Tank Juice Bar

6.4.18 Mad Mex Fresh Mexican Grill

6.4.19 Habitual Fix

6.4.20 Coffee Culture

7 MARKET OPPORTUNITIES AND FUTURE OUTLOOK

Scotts International. EU Vat number: PL 6772247784

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

www.scotts-international.com

**New Zealand Foodservice - Market Share Analysis, Industry Trends & Statistics,
Growth Forecasts (2026 - 2031)**

Market Report | 2026-01-16 | 90 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@scotts-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@scotts-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="2026-02-27"/>
		Signature	

Scotts International. EU Vat number: PL 6772247784

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

www.scotts-international.com

