



Consumer Foodservice in South Africa

March 2026

Table of Contents

EXECUTIVE SUMMARY

Convenience, cost pressures and consumer caution are key influences

KEY DATA FINDINGS

INDUSTRY PERFORMANCE

Macroeconomic stabilisation boosts performance as consumers remain price sensitive

Frictionless and omnichannel fulfilment gain strategic importance

Loyalty schemes play increasingly central role in consumer engagement

WHAT'S NEXT?

Convenience, digitalisation and evolving consumer habits will sustain growth

Technology and format innovation to drive competitive differentiation

COMPETITIVE LANDSCAPE

Famous Brands leads foodservice landscape

Krugkor Pty Ltd's Dros leads growth momentum

Supermarket-prepared foods intensify competitive pressure

CHANNELS

Chains gain ground while independents compete through agility and local appeal

MARKET DATA

Table 1 - Units, Transactions and Value Sales in Consumer Foodservice 2020-2025

Table 2 - Units, Transactions and Value Sales in Consumer Foodservice: % Growth 2020-2025

Table 3 - Consumer Foodservice by Independent vs Chained by Type: Units/Outlets 2025

Table 4 - Consumer Foodservice by Independent vs Chained: % Foodservice Value 2020-2025

Table 5 - Sales in Consumer Foodservice by Food vs Drink Split: % Foodservice Value 2020-2025

Table 6 - Sales in Consumer Foodservice by Food vs Drink Split by Type: % Foodservice Value 2025

Table 7 - Sales in Consumer Foodservice by Location: % Foodservice Value 2020-2025

Table 8 - Sales in Consumer Foodservice by Fulfillment: % Foodservice Value 2020-2025

Table 9 - GBO Company Shares in Chained Consumer Foodservice: % Foodservice Value 2021-2025

Table 10 - GBN Brand Shares in Chained Consumer Foodservice: % Foodservice Value 2022-2025

Table 11 - GBN Brand Shares in Chained Consumer Foodservice: Units/Outlets 2025

Table 12 - Forecast Units, Transactions and Value Sales in Consumer Foodservice 2025-2030

Table 13 - Forecast Units, Transactions and Value Sales in Consumer Foodservice: % Growth 2025-2030

DISCLAIMER

SOURCES

Summary 1 - Research Sources

Cafés/Bars in South Africa

KEY DATA FINDINGS

2025 DEVELOPMENTS

Cafés thrive on daytime dining, convenience, and premium coffee

INDUSTRY PERFORMANCE

Cafés/bars benefit from daytime dining boom

Juice/smoothie bars benefit from health and wellness trends

Specialist coffee and tea players seek to boost visibility through travel partnerships

WHAT'S NEXT?

Cafés to drive growth through daytime dining

Smaller formats, forecourt partnerships and mobile units set to gain traction

Loyalty programmes and coffee subscriptions to drive growth

COMPETITIVE LANDSCAPE

Mugg & Bean maintains leadership through focus on smaller formats

Vovo Telo leads growth

Independent operators remain dominant

CATEGORY DATA

Table 14 - Cafés/Bars by Category: Units/Outlets 2020-2025

Table 15 - Sales in Cafés/Bars by Category: Number of Transactions 2020-2025

Table 16 - Sales in Cafés/Bars by Category: Foodservice Value 2020-2025

Table 17 - Cafés/Bars by Category: % Units/Outlets Growth 2020-2025

Table 18 - Sales in Cafés/Bars by Category: % Transaction Growth 2020-2025

Table 19 - Sales in Cafés/Bars by Category: % Foodservice Value Growth 2020-2025

Table 20 - GBO Company Shares in Chained Cafés/Bars: % Foodservice Value 2021-2025

Table 21 - GBN Brand Shares in Chained Cafés/Bars: % Foodservice Value 2022-2025

Table 22 - Forecast Cafés/Bars by Category: Units/Outlets 2025-2030

Table 23 - Forecast Sales in Cafés/Bars by Category: Number of Transactions 2025-2030

Table 24 - Forecast Sales in Cafés/Bars by Category: Foodservice Value 2025-2030

Table 25 - Forecast Cafés/Bars by Category: % Units/Outlets Growth 2025-2030

Table 26 - Forecast Sales in Cafés/Bars by Category: % Transaction Growth 2025-2030

Table 27 - Forecast Sales in Cafés/Bars by Category: % Foodservice Value Growth 2025-2030

DISCLAIMER

[Full-Service Restaurants in South Africa](#)

KEY DATA FINDINGS

2025 DEVELOPMENTS

Full-service restaurants navigate cost pressures and changing consumer habits

INDUSTRY PERFORMANCE

Full-service restaurants record positive growth despite ongoing cost pressures

Pizza full-service restaurants register strong demand due to sharing appeal

Consumers prioritise value-for-money, fulfilment efficiency and meaningful social experiences

WHAT'S NEXT?

Growth will be constrained by value pressures and channel competition

Major players look to diversify fulfilment strategies

COMPETITIVE LANDSCAPE

Spur maintains leadership

Krugkor Pty Ltd's Dros brand leads growth

Independents maintain their edge over chains

CATEGORY DATA

Table 28 - Full-Service Restaurants by Category: Units/Outlets 2020-2025

Table 29 - Sales in Full-Service Restaurants by Category: Number of Transactions 2020-2025

Table 30 - Sales in Full-Service Restaurants by Category: Foodservice Value 2020-2025

Table 31 - Full-Service Restaurants by Category: % Units/Outlets Growth 2020-2025

Table 32 - Sales in Full-Service Restaurants by Category: % Transaction Growth 2020-2025

Table 33 - Sales in Full-Service Restaurants by Category: % Foodservice Value Growth 2020-2025

Table 34 - GBO Company Shares in Chained Full-Service Restaurants: % Foodservice Value 2021-2025

Table 35 - GBN Brand Shares in Chained Full-Service Restaurants: % Foodservice Value 2022-2025

Table 36 - Forecast Full-Service Restaurants by Category: Units/Outlets 2025-2030

Table 37 - Forecast Sales in Full-Service Restaurants by Category: Number of Transactions 2025-2030

Table 38 - Forecast Sales in Full-Service Restaurants by Category: Foodservice Value 2025-2030

Table 39 - Forecast Full-Service Restaurants by Category: % Units/Outlets Growth 2025-2030

Table 40 - Forecast Sales in Full-Service Restaurants by Category: % Transaction Growth 2025-2030

Table 41 - Forecast Sales in Full-Service Restaurants by Category: % Foodservice Value Growth 2025-2030

DISCLAIMER

Limited-Service Restaurants in South Africa

KEY DATA FINDINGS

2025 DEVELOPMENTS

Value-led dining and convenience shape limited-service restaurant expansion

INDUSTRY PERFORMANCE

Steady growth for limited-service restaurants, despite operational challenges

Fish-focused chains see strongest performance but chicken remains South African favourite

Balance between value-for-money and convenience drives consumer choice

WHAT'S NEXT?

Digital acceleration and ongoing popularity of chicken-based menus will drive growth

Convenience-led fulfilment will shape next phase of growth

Supermarket-prepared food will represent rising competition

COMPETITIVE LANDSCAPE

Famous Brands leads increasingly competitive landscape

Mochachos and Pedro's benefit from growing popularity of chicken as affordable protein

Chained foodservice operators dominate limited-service restaurants

CATEGORY DATA

Table 42 - Limited-Service Restaurants by Category: Units/Outlets 2020-2025

Table 43 - Sales in Limited-Service Restaurants by Category: Number of Transactions 2020-2025

Table 44 - Sales in Limited-Service Restaurants by Category: Foodservice Value 2020-2025

Table 45 - Limited-Service Restaurants by Category: % Units/Outlets Growth 2020-2025

Table 46 - Sales in Limited-Service Restaurants by Category: % Transaction Growth 2020-2025

Table 47 - Sales in Limited-Service Restaurants by Category: % Foodservice Value Growth 2020-2025

Table 48 - GBO Company Shares in Chained Limited-Service Restaurants: % Foodservice Value 2021-2025

Table 49 - GBN Brand Shares in Chained Limited-Service Restaurants: % Foodservice Value 2022-2025

Table 50 - Forecast Limited-Service Restaurants by Category: Units/Outlets 2025-2030

Table 51 - Forecast Sales in Limited-Service Restaurants by Category: Number of Transactions 2025-2030

Table 52 - Forecast Sales in Limited-Service Restaurants by Category: Foodservice Value 2025-2030

Table 53 - Forecast Limited-Service Restaurants by Category: % Units/Outlets Growth 2025-2030

Table 54 - Forecast Sales in Limited-Service Restaurants by Category: % Transaction Growth 2025-2030

Table 55 - Forecast Sales in Limited-Service Restaurants by Category: % Foodservice Value Growth 2025-2030

DISCLAIMER

Street Stalls/Kiosks in South Africa

KEY DATA FINDINGS

2025 DEVELOPMENTS

Street stalls and kiosks remain resilient, led by independents and flexible formats

INDUSTRY PERFORMANCE

Street stalls/kiosks display continued growth

Chained operators explore kiosks as potential growth avenue

WHAT'S NEXT?

Street stalls/kiosks poised for continued growth

Financial inclusion and digital payment ecosystems to drive future growth

Policy support could aid future growth potential for independent operators

COMPETITIVE LANDSCAPE

Competitive landscape remains highly fragmented

Established chains expand through mobile and event-based formats

Independents dominate sales

CATEGORY DATA

Table 56 - Street Stalls/Kiosks: Units/Outlets 2020-2025

Table 57 - Sales in Street Stalls/Kiosks: Number of Transactions 2020-2025

Table 58 - Sales in Street Stalls/Kiosks: Foodservice Value 2020-2025

Table 59 - Street Stalls/Kiosks: % Units/Outlets Growth 2020-2025

Table 60 - Sales in Street Stalls/Kiosks: % Transaction Growth 2020-2025

Table 61 - Sales in Street Stalls/Kiosks: % Foodservice Value Growth 2020-2025

Table 62 - GBO Company Shares in Chained Street Stalls/Kiosks: % Foodservice Value 2021-2025

Table 63 - GBN Brand Shares in Chained Street Stalls/Kiosks: % Foodservice Value 2022-2025

Table 64 - Forecast Street Stalls/Kiosks: Units/Outlets 2025-2030

Table 65 - Forecast Sales in Street Stalls/Kiosks: Number of Transactions 2025-2030

Table 66 - Forecast Sales in Street Stalls/Kiosks: Foodservice Value 2025-2030

Table 67 - Forecast Street Stalls/Kiosks: % Units/Outlets Growth 2025-2030

Table 68 - Forecast Sales in Street Stalls/Kiosks: % Transaction Growth 2025-2030

Table 69 - Forecast Sales in Street Stalls/Kiosks: % Foodservice Value Growth 2025-2030

DISCLAIMER

[Consumer Foodservice By Location in South Africa](#)

KEY DATA FINDINGS

2025 DEVELOPMENTS

Travel and convenience shape foodservice location trends

INDUSTRY PERFORMANCE

Record tourism numbers benefit foodservice outlets within travel locations

Standalone remains core driver, with chained operators seeking untapped areas to gain share

WHAT'S NEXT?

Sporting fixtures set to drive growth within leisure locations

Standalone outlets will shift focus to untapped markets and smaller formats

Government's tourism initiatives set to boost travel, leisure and lodging foodservice

COMPETITIVE LANDSCAPE

Large chains retain strong presence within non-standalone locations

Key players place increasing emphasis on standalone drive-throughs

CATEGORY DATA

Table 70 - Consumer Foodservice by Location: Units/Outlets 2020-2025
Table 71 - Sales in Consumer Foodservice by Location: Number of Transactions 2020-2025
Table 72 - Sales in Consumer Foodservice by Location: Foodservice Value 2020-2025
Table 73 - Consumer Foodservice by Location: % Units/Outlets Growth 2020-2025
Table 74 - Sales in Consumer Foodservice by Location: % Transaction Growth 2020-2025
Table 75 - Sales in Consumer Foodservice by Location: % Foodservice Value Growth 2020-2025
Table 76 - Consumer Foodservice Through Standalone: Units/Outlets 2020-2025
Table 77 - Sales in Consumer Foodservice Through Standalone: Number of Transactions 2020-2025
Table 78 - Sales in Consumer Foodservice Through Standalone: Foodservice Value 2020-2025
Table 79 - Consumer Foodservice Through Standalone: % Units/Outlets Growth 2020-2025
Table 80 - Sales in Consumer Foodservice Through Standalone: % Transaction Growth 2020-2025
Table 81 - Sales in Consumer Foodservice Through Standalone: % Foodservice Value Growth 2020-2025
Table 82 - Consumer Foodservice Through Leisure: Units/Outlets 2020-2025
Table 83 - Sales in Consumer Foodservice Through Leisure: Number of Transactions 2020-2025
Table 84 - Sales in Consumer Foodservice Through Leisure: Foodservice Value 2020-2025
Table 85 - Consumer Foodservice Through Leisure: % Units/Outlets Growth 2020-2025
Table 86 - Sales in Consumer Foodservice Through Leisure: % Transaction Growth 2020-2025
Table 87 - Sales in Consumer Foodservice Through Leisure: % Foodservice Value Growth 2020-2025
Table 88 - Consumer Foodservice Through Retail: Units/Outlets 2020-2025
Table 89 - Sales in Consumer Foodservice Through Retail: Number of Transactions 2020-2025
Table 90 - Sales in Consumer Foodservice Through Retail: Foodservice Value 2020-2025
Table 91 - Consumer Foodservice Through Retail: % Units/Outlets Growth 2020-2025
Table 92 - Sales in Consumer Foodservice Through Retail: % Transaction Growth 2020-2025
Table 93 - Sales in Consumer Foodservice Through Retail: % Foodservice Value Growth 2020-2025
Table 94 - Consumer Foodservice Through Lodging: Units/Outlets 2020-2025
Table 95 - Sales in Consumer Foodservice Through Lodging: Number of Transactions 2020-2025
Table 96 - Sales in Consumer Foodservice Through Lodging: Foodservice Value 2020-2025
Table 97 - Consumer Foodservice Through Lodging: % Units/Outlets Growth 2020-2025
Table 98 - Sales in Consumer Foodservice Through Lodging: % Transaction Growth 2020-2025
Table 99 - Sales in Consumer Foodservice Through Lodging: % Foodservice Value Growth 2020-2025
Table 100 - Consumer Foodservice Through Travel: Units/Outlets 2020-2025
Table 101 - Sales in Consumer Foodservice Through Travel: Number of Transactions 2020-2025
Table 102 - Sales in Consumer Foodservice Through Travel: Foodservice Value 2020-2025
Table 103 - Consumer Foodservice Through Travel: % Units/Outlets Growth 2020-2025
Table 104 - Sales in Consumer Foodservice Through Travel: % Transaction Growth 2020-2025
Table 105 - Sales in Consumer Foodservice Through Travel: % Foodservice Value Growth 2020-2025
Table 106 - Forecast Consumer Foodservice by Location: Units/Outlets 2025-2030
Table 107 - Forecast Sales in Consumer Foodservice by Location: Number of Transactions 2025-2030
Table 108 - Forecast Sales in Consumer Foodservice by Location: Foodservice Value 2025-2030
Table 109 - Forecast Consumer Foodservice by Location: % Units/Outlets Growth 2025-2030
Table 110 - Forecast Sales in Consumer Foodservice by Location: % Transaction Growth 2025-2030
Table 111 - Forecast Sales in Consumer Foodservice by Location: % Foodservice Value Growth 2025-2030
Table 112 - Forecast Consumer Foodservice Through Standalone: Units/Outlets 2025-2030
Table 113 - Forecast Sales in Consumer Foodservice Through Standalone: Number of Transactions 2025-2030
Table 114 - Forecast Sales in Consumer Foodservice Through Standalone: Foodservice Value 2025-2030
Table 115 - Forecast Consumer Foodservice Through Standalone: % Units/Outlets Growth 2025-2030
Table 116 - Forecast Sales in Consumer Foodservice Through Standalone: % Transaction Growth 2025-2030
Table 117 - Forecast Sales in Consumer Foodservice Through Standalone: % Foodservice Value Growth 2025-2030
Table 118 - Forecast Consumer Foodservice Through Leisure: Units/Outlets 2025-2030
Table 119 - Forecast Sales in Consumer Foodservice Through Leisure: Number of Transactions 2025-2030

Table 120 - Forecast Sales in Consumer Foodservice Through Leisure: Foodservice Value 2025-2030

Table 121 - Forecast Consumer Foodservice Through Leisure: % Units/Outlets Growth 2025-2030

Table 122 - Forecast Sales in Consumer Foodservice Through Leisure: % Transaction Growth 2025-2030

Table 123 - Forecast Sales in Consumer Foodservice Through Leisure: % Foodservice Value Growth 2025-2030

Table 124 - Forecast Consumer Foodservice Through Retail: Units/Outlets 2025-2030

Table 125 - Forecast Sales in Consumer Foodservice Through Retail: Number of Transactions 2025-2030

Table 126 - Forecast Sales in Consumer Foodservice Through Retail: Foodservice Value 2025-2030

Table 127 - Forecast Consumer Foodservice Through Retail: % Units/Outlets Growth 2025-2030

Table 128 - Forecast Sales in Consumer Foodservice Through Retail: % Transaction Growth 2025-2030

Table 129 - Forecast Sales in Consumer Foodservice Through Retail: % Foodservice Value Growth 2025-2030

Table 130 - Forecast Consumer Foodservice Through Lodging: Units/Outlets 2025-2030

Table 131 - Forecast Sales in Consumer Foodservice Through Lodging: Number of Transactions 2025-2030

Table 132 - Forecast Sales in Consumer Foodservice Through Lodging: Foodservice Value 2025-2030

Table 133 - Forecast Consumer Foodservice Through Lodging: % Units/Outlets Growth 2025-2030

Table 134 - Forecast Sales in Consumer Foodservice Through Lodging: % Transaction Growth 2025-2030

Table 135 - Forecast Sales in Consumer Foodservice Through Lodging: % Foodservice Value Growth 2025-2030

Table 136 - Forecast Consumer Foodservice Through Travel: Units/Outlets 2025-2030

Table 137 - Forecast Sales in Consumer Foodservice Through Travel: Number of Transactions 2025-2030

Table 138 - Forecast Sales in Consumer Foodservice Through Travel: Foodservice Value 2025-2030

Table 139 - Forecast Consumer Foodservice Through Travel: % Units/Outlets Growth 2025-2030

Table 140 - Forecast Sales in Consumer Foodservice Through Travel: % Transaction Growth 2025-2030

Table 141 - Forecast Sales in Consumer Foodservice Through Travel: % Foodservice Value Growth 2025-2030

DISCLAIMER

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-south-africa/report.