



Euromonitor
International

Consumer Foodservice By Location in Australia

March 2026

Table of Contents

KEY DATA FINDINGS

2025 DEVELOPMENTS

Strong growth for retail locations

INDUSTRY PERFORMANCE

Foodservice through retail stands out as the most dynamic foodservice channel
Standalone foodservice growth continues to set the pace for the overall industry
Standalone outlets to benefit from growth in drive-through sales

WHAT'S NEXT?

Retail outlets to experience steady growth as consumer spending increases
The standalone segment maintains a large share of the market
Improving economic conditions is a significant opportunity for the industry

COMPETITIVE LANDSCAPE

Non-standalone channel sees strong competition from the largest chained foodservice brands
Expansion via franchising to drive growth in the standalone foodservice sector

CATEGORY DATA

Table 1 - Consumer Foodservice by Location: Units/Outlets 2020-2025
Table 2 - Sales in Consumer Foodservice by Location: Number of Transactions 2020-2025
Table 3 - Sales in Consumer Foodservice by Location: Foodservice Value 2020-2025
Table 4 - Consumer Foodservice by Location: % Units/Outlets Growth 2020-2025
Table 5 - Sales in Consumer Foodservice by Location: % Transaction Growth 2020-2025
Table 6 - Sales in Consumer Foodservice by Location: % Foodservice Value Growth 2020-2025
Table 7 - Consumer Foodservice Through Standalone: Units/Outlets 2020-2025
Table 8 - Sales in Consumer Foodservice Through Standalone: Number of Transactions 2020-2025
Table 9 - Sales in Consumer Foodservice Through Standalone: Foodservice Value 2020-2025
Table 10 - Consumer Foodservice Through Standalone: % Units/Outlets Growth 2020-2025
Table 11 - Sales in Consumer Foodservice Through Standalone: % Transaction Growth 2020-2025
Table 12 - Sales in Consumer Foodservice Through Standalone: % Foodservice Value Growth 2020-2025
Table 13 - Consumer Foodservice Through Leisure: Units/Outlets 2020-2025
Table 14 - Sales in Consumer Foodservice Through Leisure: Number of Transactions 2020-2025
Table 15 - Sales in Consumer Foodservice Through Leisure: Foodservice Value 2020-2025
Table 16 - Consumer Foodservice Through Leisure: % Units/Outlets Growth 2020-2025
Table 17 - Sales in Consumer Foodservice Through Leisure: % Transaction Growth 2020-2025
Table 18 - Sales in Consumer Foodservice Through Leisure: % Foodservice Value Growth 2020-2025
Table 19 - Consumer Foodservice Through Retail: Units/Outlets 2020-2025
Table 20 - Sales in Consumer Foodservice Through Retail: Number of Transactions 2020-2025
Table 21 - Sales in Consumer Foodservice Through Retail: Foodservice Value 2020-2025
Table 22 - Consumer Foodservice Through Retail: % Units/Outlets Growth 2020-2025
Table 23 - Sales in Consumer Foodservice Through Retail: % Transaction Growth 2020-2025
Table 24 - Sales in Consumer Foodservice Through Retail: % Foodservice Value Growth 2020-2025
Table 25 - Consumer Foodservice Through Lodging: Units/Outlets 2020-2025
Table 26 - Sales in Consumer Foodservice Through Lodging: Number of Transactions 2020-2025
Table 27 - Sales in Consumer Foodservice Through Lodging: Foodservice Value 2020-2025
Table 28 - Consumer Foodservice Through Lodging: % Units/Outlets Growth 2020-2025
Table 29 - Sales in Consumer Foodservice Through Lodging: % Transaction Growth 2020-2025
Table 30 - Sales in Consumer Foodservice Through Lodging: % Foodservice Value Growth 2020-2025
Table 31 - Consumer Foodservice Through Travel: Units/Outlets 2020-2025
Table 32 - Sales in Consumer Foodservice Through Travel: Number of Transactions 2020-2025

Table 33 - Sales in Consumer Foodservice Through Travel: Foodservice Value 2020-2025
Table 34 - Consumer Foodservice Through Travel: % Units/Outlets Growth 2020-2025
Table 35 - Sales in Consumer Foodservice Through Travel: % Transaction Growth 2020-2025
Table 36 - Sales in Consumer Foodservice Through Travel: % Foodservice Value Growth 2020-2025
Table 37 - Forecast Consumer Foodservice by Location: Units/Outlets 2025-2030
Table 38 - Forecast Sales in Consumer Foodservice by Location: Number of Transactions 2025-2030
Table 39 - Forecast Sales in Consumer Foodservice by Location: Foodservice Value 2025-2030
Table 40 - Forecast Consumer Foodservice by Location: % Units/Outlets Growth 2025-2030
Table 41 - Forecast Sales in Consumer Foodservice by Location: % Transaction Growth 2025-2030
Table 42 - Forecast Sales in Consumer Foodservice by Location: % Foodservice Value Growth 2025-2030
Table 43 - Forecast Consumer Foodservice Through Standalone: Units/Outlets 2025-2030
Table 44 - Forecast Sales in Consumer Foodservice Through Standalone: Number of Transactions 2025-2030
Table 45 - Forecast Sales in Consumer Foodservice Through Standalone: Foodservice Value 2025-2030
Table 46 - Forecast Consumer Foodservice Through Standalone: % Units/Outlets Growth 2025-2030
Table 47 - Forecast Sales in Consumer Foodservice Through Standalone: % Transaction Growth 2025-2030
Table 48 - Forecast Sales in Consumer Foodservice Through Standalone: % Foodservice Value Growth 2025-2030
Table 49 - Forecast Consumer Foodservice Through Leisure: Units/Outlets 2025-2030
Table 50 - Forecast Sales in Consumer Foodservice Through Leisure: Number of Transactions 2025-2030
Table 51 - Forecast Sales in Consumer Foodservice Through Leisure: Foodservice Value 2025-2030
Table 52 - Forecast Consumer Foodservice Through Leisure: % Units/Outlets Growth 2025-2030
Table 53 - Forecast Sales in Consumer Foodservice Through Leisure: % Transaction Growth 2025-2030
Table 54 - Forecast Sales in Consumer Foodservice Through Leisure: % Foodservice Value Growth 2025-2030
Table 55 - Forecast Consumer Foodservice Through Retail: Units/Outlets 2025-2030
Table 56 - Forecast Sales in Consumer Foodservice Through Retail: Number of Transactions 2025-2030
Table 57 - Forecast Sales in Consumer Foodservice Through Retail: Foodservice Value 2025-2030
Table 58 - Forecast Consumer Foodservice Through Retail: % Units/Outlets Growth 2025-2030
Table 59 - Forecast Sales in Consumer Foodservice Through Retail: % Transaction Growth 2025-2030
Table 60 - Forecast Sales in Consumer Foodservice Through Retail: % Foodservice Value Growth 2025-2030
Table 61 - Forecast Consumer Foodservice Through Lodging: Units/Outlets 2025-2030
Table 62 - Forecast Sales in Consumer Foodservice Through Lodging: Number of Transactions 2025-2030
Table 63 - Forecast Sales in Consumer Foodservice Through Lodging: Foodservice Value 2025-2030
Table 64 - Forecast Consumer Foodservice Through Lodging: % Units/Outlets Growth 2025-2030
Table 65 - Forecast Sales in Consumer Foodservice Through Lodging: % Transaction Growth 2025-2030
Table 66 - Forecast Sales in Consumer Foodservice Through Lodging: % Foodservice Value Growth 2025-2030
Table 67 - Forecast Consumer Foodservice Through Travel: Units/Outlets 2025-2030
Table 68 - Forecast Sales in Consumer Foodservice Through Travel: Number of Transactions 2025-2030
Table 69 - Forecast Sales in Consumer Foodservice Through Travel: Foodservice Value 2025-2030
Table 70 - Forecast Consumer Foodservice Through Travel: % Units/Outlets Growth 2025-2030
Table 71 - Forecast Sales in Consumer Foodservice Through Travel: % Transaction Growth 2025-2030
Table 72 - Forecast Sales in Consumer Foodservice Through Travel: % Foodservice Value Growth 2025-2030

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[Consumer Foodservice in Australia - Industry Overview](#)

EXECUTIVE SUMMARY

A challenging year for consumer foodservice

KEY DATA FINDINGS

INDUSTRY PERFORMANCE

Consumer foodservice industry in recovery mode as inflation eases

Traditional channels experience a resurgence as the delivery channel slows

Loyalty a key focus area for brands as competition in foodservice intensifies

WHAT'S NEXT?

Consumer spending to recover well over the forecast period

Innovation will be tied to global trends such as the recent K-Wave

Consumers to refocus on sustainability as purchasing power grows

COMPETITIVE LANDSCAPE

Global foodservice brands maintain strong position in the market

Smaller franchises experience strong growth in evolving market

International brands enter Australian market increasing local competition

CHANNELS

Independent operators hold edge over chained operators in 2025

Independent operators are quicker to respond to viral food trends

MARKET DATA

Table 73 - Units, Transactions and Value Sales in Consumer Foodservice 2020-2025

Table 74 - Units, Transactions and Value Sales in Consumer Foodservice: % Growth 2020-2025

Table 75 - Consumer Foodservice by Independent vs Chained by Type: Units/Outlets 2025

Table 76 - Consumer Foodservice by Independent vs Chained: % Foodservice Value 2020-2025

Table 77 - Sales in Consumer Foodservice by Food vs Drink Split: % Foodservice Value 2020-2025

Table 78 - Sales in Consumer Foodservice by Food vs Drink Split by Type: % Foodservice Value 2025

Table 79 - Sales in Consumer Foodservice by Location: % Foodservice Value 2020-2025

Table 80 - Sales in Consumer Foodservice by Fulfillment: % Foodservice Value 2020-2025

Table 81 - GBO Company Shares in Chained Consumer Foodservice: % Foodservice Value 2021-2025

Table 82 - GBN Brand Shares in Chained Consumer Foodservice: % Foodservice Value 2022-2025

Table 83 - GBN Brand Shares in Chained Consumer Foodservice: Units/Outlets 2025

Table 84 - Forecast Units, Transactions and Value Sales in Consumer Foodservice 2025-2030

Table 85 - Forecast Units, Transactions and Value Sales in Consumer Foodservice: % Growth 2025-2030

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SOURCES

Summary 1 - Research Sources

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