



Consumer Foodservice in Australia

March 2026

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Consumer Foodservice in Australia

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

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Juice/smoothie bars maintains growth on the back of premiumisation
Quality is key value promise for consumers as foodservice becomes more of a luxury

WHAT'S NEXT?

Rising consumer expenditure to boost growth of cafés/bars
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Eating-in is a core feature of full-service restaurants

WHAT'S NEXT?

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Strong performance for Latin American limited-service restaurants

Drive-throughs experience steady growth and increase share of sales

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Drive-throughs to attract further investment

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INDUSTRY PERFORMANCE

Tighter consumer budgets cause weaker performance for the category

Independent operators experience slight growth amid rising interest in shared eating experiences

Value for money remains key concern for self-service cafeterias

WHAT'S NEXT?

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KEY DATA FINDINGS

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INDUSTRY PERFORMANCE

Street stalls find success through rise of festivals and events

Independent operators drive category growth through high mobility and adaptability

Delivery and takeaway channels vital for street stalls/kiosks

WHAT'S NEXT?

Street stalls/kiosks are expected to enjoy steady growth with abundance of opportunities
Takeaway is key channel, but delivery apps will continue to play important role
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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

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