



# Full-Service Restaurants in South Africa

March 2026

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## Full-Service Restaurants in South Africa - Category analysis

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#### 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

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Spur maintains leadership

Krugkor Pty Ltd's Dros brand leads growth

Independents maintain their edge over chains

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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

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Supermarket-prepared foods intensify competitive pressure

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