



Euromonitor
International

Consumer Foodservice By Location in South Africa

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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

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[Consumer Foodservice in South Africa - Industry Overview](#)

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

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