



Euromonitor
International

Cafés/Bars in South Africa

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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

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Consumer Foodservice in South Africa - Industry Overview

EXECUTIVE SUMMARY

Convenience, cost pressures and consumer caution are key influences

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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

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Chains gain ground while independents compete through agility and local appeal

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