



Limited-Service Restaurants in South Africa

March 2026

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2025 DEVELOPMENTS

Value-led dining and convenience shape limited-service restaurant expansion

INDUSTRY PERFORMANCE

Steady growth for limited-service restaurants, despite operational challenges

Fish-focused chains see strongest performance but chicken remains South African favourite

Balance between value-for-money and convenience drives consumer choice

WHAT'S NEXT?

Digital acceleration and ongoing popularity of chicken-based menus will drive growth

Convenience-led fulfilment will shape next phase of growth

Supermarket-prepared food will represent rising competition

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Famous Brands leads increasingly competitive landscape

Mochachos and Pedro's benefit from growing popularity of chicken as affordable protein

Chained foodservice operators dominate limited-service restaurants

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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

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