



**Euromonitor
International**

Consumer Foodservice By Location in Australia

March 2026

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KEY DATA FINDINGS

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

Non-standalone channel sees strong competition from the largest chained foodservice brands
Expansion via franchising to drive growth in the standalone foodservice sector

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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

Smaller franchises experience strong growth in evolving market

International brands enter Australian market increasing local competition

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Independent operators hold edge over chained operators in 2025

Independent operators are quicker to respond to viral food trends

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