



# Consumer Foodservice in Australia

March 2026

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## Consumer Foodservice in Australia

### 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

#### CHANNELS

Independent operators hold edge over chained operators in 2025  
Independent operators are quicker to respond to viral food trends

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## Cafés/Bars in Australia

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#### 2025 DEVELOPMENTS

Cafés/bars grapples with economic constraints

#### INDUSTRY PERFORMANCE

Cafés/bars face economic challenges limiting performance in 2025

Juice/smoothie bars maintains growth on the back of premiumisation  
Quality is key value promise for consumers as foodservice becomes more of a luxury

#### WHAT'S NEXT?

Rising consumer expenditure to boost growth of cafés/bars  
Dine-in channel is key for cafés and bars relying on returning customers  
Innovation in iced beverages is key to coffee and tea shop development

#### COMPETITIVE LANDSCAPE

Retail Zoo edges ahead in highly fragmented competitive landscape  
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[Full-Service Restaurants in Australia](#)

#### KEY DATA FINDINGS

##### 2025 DEVELOPMENTS

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##### INDUSTRY PERFORMANCE

Full-service restaurants face challenges as the foodservice industry gradually recovers  
Full-service Asian restaurants benefit from consumer familiarity  
Eating-in is a core feature of full-service restaurants

#### WHAT'S NEXT?

Full-service restaurants expected to underperform compared to overall market  
The eat-in channel is vital for the category in the forecast period  
Costs of operating a business and price of ingredients will remain a challenge

#### COMPETITIVE LANDSCAPE

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#### INDUSTRY PERFORMANCE

Modest growth for the category as consumer spending gradually recovers

Strong performance for Latin American limited-service restaurants

Drive-throughs experience steady growth and increase share of sales

#### WHAT'S NEXT?

Positive outlook as companies focus on delivering better value to consumers

Drive-throughs to attract further investment

Customer loyalty as focus area for limited-service restaurants

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### Self-Service Cafeterias in Australia

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##### INDUSTRY PERFORMANCE

Tighter consumer budgets cause weaker performance for the category

Independent operators experience slight growth amid rising interest in shared eating experiences

Value for money remains key concern for self-service cafeterias

##### WHAT'S NEXT?

Improving economic conditions to boost category performance

Self-service cafeterias to remain heavily reliant on eat-in business

Inspiration from international brands is key for innovation

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### Street Stalls/Kiosks in Australia

#### KEY DATA FINDINGS

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Events and festivals boost value growth

##### INDUSTRY PERFORMANCE

Street stalls find success through rise of festivals and events

Independent operators drive category growth through high mobility and adaptability

Delivery and takeaway channels vital for street stalls/kiosks

##### WHAT'S NEXT?

Street stalls/kiosks are expected to enjoy steady growth with abundance of opportunities  
Takeaway is key channel, but delivery apps will continue to play important role  
Menu innovation is important strength for the category

#### COMPETITIVE LANDSCAPE

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[Consumer Foodservice By Location in Australia](#)

#### 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

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