



Passport

Consumer Foodservice in Australia

Euromonitor International

March 2022

This sample report is for illustration
purposes only.

Some content and data have been
changed.

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CONSUMER FOODSERVICE IN AUSTRALIA - INDUSTRY OVERVIEW

EXECUTIVE SUMMARY

Consumer foodservice in 2021: The big picture

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2021 key trends

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Competitive landscape

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Independent foodservice developments

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What next for consumer foodservice?

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MARKET DATA

Table 1 Units, Transactions and Value Sales in Consumer Foodservice 2016-2021

| | 2016 | 2017 | 2018 | 2019 | 2020 | 2021 |
|-------------------|--------------------------|------|------|------|------|------|
| Units | Data removed from sample | | | | | |
| Transactions (mn) | | | | | | |

AUD million current
prices
AUD million constant
prices

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Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 2 Units, Transactions and Value Sales in Consumer Foodservice: % Growth 2016-2021

% growth

2020/21 2016-21 CAGR 2016/21 Total

Units
Transactions
Value current prices
Value constant prices

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 3 Consumer Foodservice by Independent vs Chained by Type: Units/Outlets 2021

outlets

Independent Chained Total

Cafés/Bars
Full-Service Restaurants
Limited-Service Restaurants
Self-Service Cafeterias
Street Stalls/Kiosks
Consumer Foodservice by Type

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Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 4 Consumer Foodservice by Independent vs Chained: % Foodservice Value 2016-2021

% value

2016 2017 2018 2019 2020 2021

Chained Foodservice
Independent Foodservice
Total

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 5 Sales in Consumer Foodservice by Eat-In vs Delivery and To-Go: % Foodservice Value 2016-2021

% value

2016 2017 2018 2019 2020 2021

Drive-Through

Data removed from sample

Eat-in
Home Delivery
Takeaway
Total

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 6 Sales in Consumer Foodservice by Food vs Drink Split: % Foodservice Value 2016-2021

| % value | 2016 | 2017 | 2018 | 2019 | 2020 | 2021 |
|---------|--------------------------|------|------|------|------|------|
| Drink | Data removed from sample | | | | | |
| Food | | | | | | |
| Total | | | | | | |

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 7 Sales in Consumer Foodservice by Food vs Drink Split by Type: % Foodservice Value 2021

| % value analysis | Food | Drink | Total |
|------------------------------|--------------------------|-------|-------|
| Cafés/Bars | Data removed from sample | | |
| Full-Service Restaurants | | | |
| Limited-Service Restaurants | | | |
| Self-Service Cafeterias | | | |
| Street Stalls/Kiosks | | | |
| Consumer Foodservice by Type | | | |

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 8 Sales in Consumer Foodservice by Online/Offline Ordering: % Foodservice Value 2016-2021

| % value | 2016 | 2017 | 2018 | 2019 | 2020 | 2021 |
|---------|--------------------------|------|------|------|------|------|
| Offline | Data removed from sample | | | | | |
| Online | | | | | | |
| Total | | | | | | |

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 9 Sales in Consumer Foodservice by Location: % Foodservice Value 2016-2021

| % value | 2016 | 2017 | 2018 | 2019 | 2020 | 2021 |
|---------|--------------------------|------|------|------|------|------|
| Leisure | Data removed from sample | | | | | |
| Lodging | | | | | | |

| | |
|-------------|--------------------------|
| Retail | Data removed from sample |
| Stand-Alone | |
| Travel | |
| Total | |

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 10 GBO Company Shares in Chained Consumer Foodservice: % Foodservice Value 2017-2021

| % value Company | 2017 | 2018 | 2019 | 2020 | 2021 |
|--------------------------|------|------|------|------|------|
| Data removed from sample | | | | | |

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 11 GBN Brand Shares in Chained Consumer Foodservice: % Foodservice Value
2018-2021

| % value Brand | Global Brand Owner | 2018 | 2019 | 2020 | 2021 |
|------------------|--------------------|------|------|------|------|
|------------------|--------------------|------|------|------|------|

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Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 12 GBN Brand Shares in Chained Consumer Foodservice: Units/Outlets 2021

| Brand | Global Brand Owner | outlets |
|-------|--------------------|---------|
|-------|--------------------|---------|

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Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 13 Forecast Units, Transactions and Value Sales in Consumer Foodservice 2021-2026

| | 2021 | 2022 | 2023 | 2024 | 2025 | 2026 |
|-------------------|--------------------------|------|------|------|------|------|
| Units | Data removed from sample | | | | | |
| Transactions (mn) | | | | | | |
| AUD million | | | | | | |

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 14 Forecast Units, Transactions and Value Sales in Consumer Foodservice: % Growth 2021-2026

| % growth | 2021/22 | 2021-26 CAGR | 2021/26 Total |
|----------------|--------------------------|--------------|---------------|
| Units | Data removed from sample | | |
| Transactions | | | |
| Constant value | | | |

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

DISCLAIMER

Forecast closing date: 7 February 2022

Report closing date: 3 March 2022

Analysis and data in this report give full consideration to consumer behaviour and market performance in 2021 and beyond as of the dates above. For the very latest insight on this industry and consumer behaviour, at both global and national level, readers can access strategic analysis and updates on www.euromonitor.com and via the Passport system, where new content is being added on a systematic basis.

SOURCES

Sources used during the research included the following:

Summary 1 Research Sources

Official Sources

Trade Associations

Trade Press

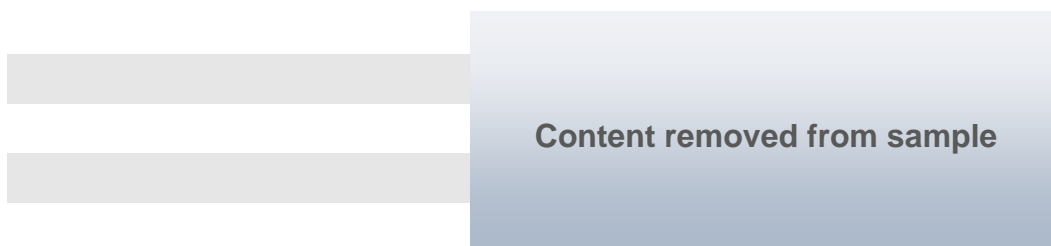
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| Company Sources | |
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| Other Sources | |



Source: Euromonitor International

CAFÉS/BARS IN AUSTRALIA - CATEGORY ANALYSIS

KEY DATA FINDINGS

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2021 DEVELOPMENTS

Severe disruptions for bars/pubs in light of strict rules

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New styles of service to engage consumers

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Safety is the first priority for health of consumers and employees

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PROSPECTS AND OPPORTUNITIES

Consumers search for sustainably-sourced and manufactured products

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Digital strategies and technology to boost growth

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Opportunities for growth presented by the charm of bubble tea

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CATEGORY DATA

Table 15 Cafés/Bars by Category: Units/Outlets 2016-2021

| outlets | 2016 | 2017 | 2018 | 2019 | 2020 | 2021 |
|--------------------------------|--------------------------|------|------|------|------|------|
| - Bars/Pubs | Data removed from sample | | | | | |
| -- Chained Bars/Pubs | | | | | | |
| -- Independent Bars/Pubs | | | | | | |
| - Cafés | | | | | | |
| -- Chained Cafés | | | | | | |
| -- Independent Cafés | | | | | | |
| - Juice/Smoothie Bars | | | | | | |
| -- Chained Juice/Smoothie Bars | | | | | | |

- Independent Juice/
Smoothie Bars
- Specialist Coffee and
Tea Shops
- Chained Specialist
Coffee and Tea Shops
- Independent
Specialist Coffee and
Tea Shops
- Chained Cafés/Bars
- Independent Cafés/Bars
- Cafés/Bars

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 16 Sales in Cafés/Bars by Category: Number of Transactions 2016-2021

'000 transactions

2016 2017 2018 2019 2020 2021

- Bars/Pubs
- Chained Bars/Pubs
- Independent Bars/Pubs
- Cafés
- Chained Cafés
- Independent Cafés
- Juice/Smoothie Bars
- Chained Juice/
Smoothie Bars
- Independent Juice/
Smoothie Bars
- Specialist Coffee and
Tea Shops
- Chained Specialist
Coffee and Tea Shops
- Independent
Specialist Coffee and
Tea Shops
- Chained Cafés/Bars
- Independent Cafés/Bars
- Cafés/Bars

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 17 Sales in Cafés/Bars by Category: Foodservice Value 2016-2021

AUD million

2016 2017 2018 2019 2020 2021

- Bars/Pubs
- Chained Bars/Pubs
- Independent Bars/Pubs
- Cafés
- Chained Cafés
- Independent Cafés
- Juice/Smoothie Bars
- Chained Juice/

Data removed from sample

- Smoothie Bars
- Independent Juice/Smoothie Bars
- Specialist Coffee and Tea Shops
- Chained Specialist Coffee and Tea Shops
- Independent Specialist Coffee and Tea Shops
- Chained Cafés/Bars
- Independent Cafés/Bars
- Cafés/Bars

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 18 Cafés/Bars by Category: % Units/Outlets Growth 2016-2021

% Units/Outlets growth

2020/21 2016-21 CAGR 2016/21 Total

- Bars/Pubs
- Chained Bars/Pubs
- Independent Bars/Pubs
- Cafés
- Chained Cafés
- Independent Cafés
- Juice/Smoothie Bars
- Chained Juice/Smoothie Bars
- Independent Juice/Smoothie Bars
- Specialist Coffee and Tea Shops
- Chained Specialist Coffee and Tea Shops
- Independent Specialist Coffee and Tea Shops
- Chained Cafés/Bars
- Independent Cafés/Bars
- Cafés/Bars

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 19 Sales in Cafés/Bars by Category: % Transaction Growth 2016-2021

% transaction growth

2020/21 2016-21 CAGR 2016/21 Total

- Bars/Pubs
- Chained Bars/Pubs
- Independent Bars/Pubs
- Cafés
- Chained Cafés
- Independent Cafés
- Juice/Smoothie Bars
- Chained Juice/Smoothie Bars
- Independent Juice/Smoothie Bars
- Specialist Coffee and Tea Shops
- Chained Specialist Coffee and Tea

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- Shops
- Independent Specialist Coffee and Tea Shops
- Chained Cafés/Bars
- Independent Cafés/Bars

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 20 Sales in Cafés/Bars by Category: % Foodservice Value Growth 2016-2021

% value growth

2020/21 2016-21 CAGR 2016/21 Total

- Bars/Pubs
- Chained Bars/Pubs
- Independent Bars/Pubs
- Cafés
- Chained Cafés
- Independent Cafés
- Juice/Smoothie Bars
- Chained Juice/Smoothie Bars
- Independent Juice/Smoothie Bars
- Specialist Coffee and Tea Shops
- Chained Specialist Coffee and Tea Shops
- Independent Specialist Coffee and Tea Shops
- Chained Cafés/Bars
- Independent Cafés/Bars

Data removed from sample

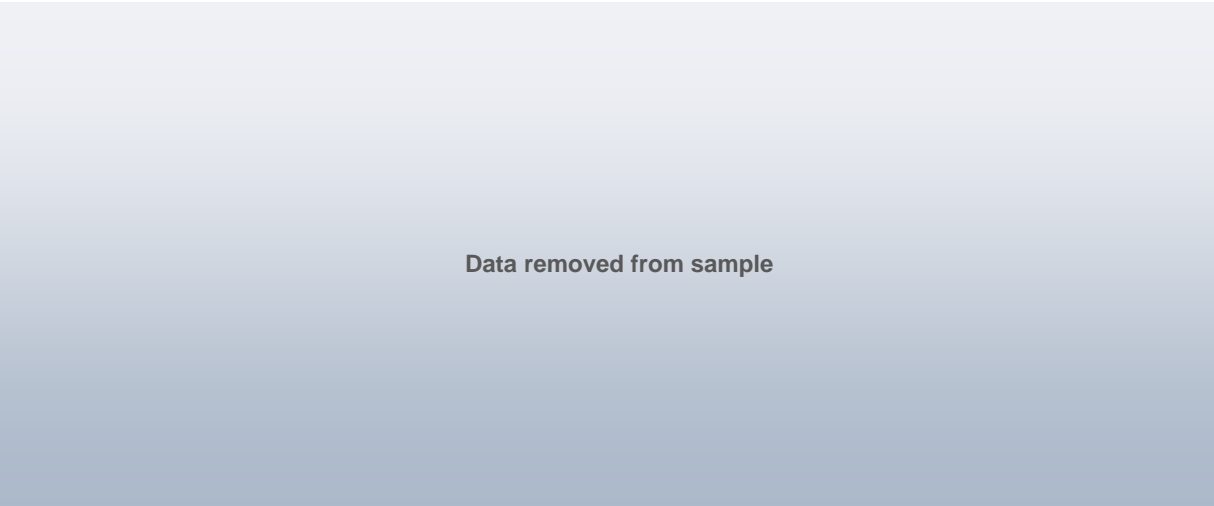
Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 21 GBO Company Shares in Chained Cafés/Bars: % Foodservice Value 2017-2021

% value
Company

2017 2018 2019 2020 2021

Data removed from sample



Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 22 GBN Brand Shares in Chained Cafés/Bars: % Foodservice Value 2018-2021

| % value Brand | Global Brand Owner | 2018 | 2019 | 2020 | 2021 |
|--------------------------|--------------------|------|------|------|------|
| Data removed from sample | | | | | |

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 23 Forecast Cafés/Bars by Category: Units/Outlets 2021-2026

| outlets | 2021 | 2022 | 2023 | 2024 | 2025 | 2026 |
|--|--------------------------|------|------|------|------|------|
| <ul style="list-style-type: none"> - Bars/Pubs -- Chained Bars/Pubs -- Independent Bars/Pubs - Cafés -- Chained Cafés -- Independent Cafés - Juice/Smoothie Bars -- Chained Juice/Smoothie Bars -- Independent Juice/Smoothie Bars - Specialist Coffee and Tea Shops -- Chained Specialist Coffee and Tea Shops -- Independent Specialist Coffee and Tea Shops - Chained Cafés/Bars - Independent Cafés/Bars | Data removed from sample | | | | | |

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 24 Forecast Sales in Cafés/Bars by Category: Number of Transactions 2021-2026

| '000 transactions | 2021 | 2022 | 2023 | 2024 | 2025 | 2026 |
|--|--------------------------|------|------|------|------|------|
| <ul style="list-style-type: none"> - Bars/Pubs -- Chained Bars/Pubs -- Independent Bars/Pubs - Cafés -- Chained Cafés -- Independent Cafés - Juice/Smoothie Bars -- Chained Juice/Smoothie Bars -- Independent Juice/Smoothie Bars - Specialist Coffee and Tea Shops | Data removed from sample | | | | | |

- Chained Specialist Coffee and Tea Shops
- Independent Specialist Coffee and Tea Shops
- Chained Cafés/Bars
- Independent Cafés/Bars

Data removed from sample

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 25 Forecast Sales in Cafés/Bars by Category: Foodservice Value 2021-2026

AUD million

| | 2021 | 2022 | 2023 | 2024 | 2025 | 2026 |
|--|--------------------------|------|------|------|------|------|
| - Bars/Pubs | Data removed from sample | | | | | |
| -- Chained Bars/Pubs | | | | | | |
| -- Independent Bars/Pubs | | | | | | |
| - Cafés | | | | | | |
| -- Chained Cafés | | | | | | |
| -- Independent Cafés | | | | | | |
| - Juice/Smoothie Bars | | | | | | |
| -- Chained Juice/Smoothie Bars | | | | | | |
| -- Independent Juice/Smoothie Bars | | | | | | |
| - Specialist Coffee and Tea Shops | | | | | | |
| -- Chained Specialist Coffee and Tea Shops | | | | | | |
| -- Independent Specialist Coffee and Tea Shops | | | | | | |
| - Chained Cafés/Bars | | | | | | |
| - Independent Cafés/Bars | | | | | | |
| Cafés/Bars | | | | | | |

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 26 Forecast Cafés/Bars by Category: % Units/Outlets Growth 2021-2026

% Units/Outlets growth

| | 2021/2022 | 2021-26 CAGR | 2021/26 Total |
|--|--------------------------|--------------|---------------|
| - Bars/Pubs | Data removed from sample | | |
| -- Chained Bars/Pubs | | | |
| -- Independent Bars/Pubs | | | |
| - Cafés | | | |
| -- Chained Cafés | | | |
| -- Independent Cafés | | | |
| - Juice/Smoothie Bars | | | |
| -- Chained Juice/Smoothie Bars | | | |
| -- Independent Juice/Smoothie Bars | | | |
| - Specialist Coffee and Tea Shops | | | |
| -- Chained Specialist Coffee and Tea Shops | | | |
| | | | |
| | | | |
| | | | |

- Independent Specialist Coffee and Tea Shops
- Chained Cafés/Bars
- Independent Cafés/Bars

Data removed from sample

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 27 Forecast Sales in Cafés/Bars by Category: % Transaction Growth 2021-2026

% transaction growth

2021/2022 2021-26 CAGR 2021/26 Total

- Bars/Pubs
- Chained Bars/Pubs
- Independent Bars/Pubs
- Cafés
- Chained Cafés
- Independent Cafés
- Juice/Smoothie Bars
- Chained Juice/Smoothie Bars
- Independent Juice/Smoothie Bars
- Specialist Coffee and Tea Shops
- Chained Specialist Coffee and Tea Shops
- Independent Specialist Coffee and Tea Shops
- Chained Cafés/Bars
- Independent Cafés/Bars

Data removed from sample

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 28 Forecast Sales in Cafés/Bars by Category: % Foodservice Value Growth 2021-2026

% value growth

2021/2022 2021-26 CAGR 2021/26 Total

- Bars/Pubs
- Chained Bars/Pubs
- Independent Bars/Pubs
- Cafés
- Chained Cafés
- Independent Cafés
- Juice/Smoothie Bars
- Chained Juice/Smoothie Bars
- Independent Juice/Smoothie Bars
- Specialist Coffee and Tea Shops
- Chained Specialist Coffee and Tea Shops
- Independent Specialist Coffee and Tea Shops
- Chained Cafés/Bars
- Independent Cafés/Bars

Data removed from sample

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

FULL-SERVICE RESTAURANTS IN AUSTRALIA - CATEGORY ANALYSIS

KEY DATA FINDINGS

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2021 DEVELOPMENTS

Iconic brand Sizzler ceases operations as Australian foodservice evolves

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Labour shortage causes crisis for businesses

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Bold flavours and unique combinations stir consumer excitement

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PROSPECTS AND OPPORTUNITIES

Online solutions for foodservice operators

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Sustainability practices to minimise waste growing as A priority

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Improving sales likely as Australia reopens international borders

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CATEGORY DATA

Table 29 Full-Service Restaurants by Category: Units/Outlets 2016-2021

| outlets | 2016 | 2017 | 2018 | 2019 | 2020 | 2021 |
|---|--------------------------|------|------|------|------|------|
| -- Asian Full-Service Restaurants | Data removed from sample | | | | | |
| --- Chained Asian Full-Service Restaurants | | | | | | |
| --- Independent Asian Full-Service Restaurants | | | | | | |
| -- European Full-Service Restaurants | | | | | | |
| --- Chained European Full-Service Restaurants | | | | | | |
| --- Independent European Full-Service Restaurants | | | | | | |
| -- Latin American Full-Service Restaurants | | | | | | |
| --- Chained Latin American Full-Service Restaurants | | | | | | |
| --- Independent Latin American Full-Service Restaurants | | | | | | |
| -- Middle Eastern Full-Service Restaurants | | | | | | |
| --- Chained Middle Eastern Full-Service Restaurants | | | | | | |
| --- Independent Middle Eastern Full-Service Restaurants | | | | | | |
| -- North American Full-Service Restaurants | | | | | | |
| --- Chained North American Full-Service Restaurants | | | | | | |
| --- Independent North American Full-Service Restaurants | | | | | | |
| -- Pizza Full-Service Restaurants | | | | | | |
| --- Chained Pizza Full-Service Restaurants | | | | | | |
| --- Independent Pizza Full-Service Restaurants | | | | | | |
| -- Other Full-Service Restaurants | | | | | | |
| --- Chained Other Full-Service Restaurants | | | | | | |
| --- Independent Other Full-Service Restaurants | | | | | | |
| - Full-Service Restaurants by Type | | | | | | |

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 30 Sales in Full-Service Restaurants by Category: Number of Transactions 2016-2021

| '000 transactions | 2016 | 2017 | 2018 | 2019 | 2020 | 2021 |
|---|--------------------------|------|------|------|------|------|
| -- Asian Full-Service Restaurants | Data removed from sample | | | | | |
| --- Chained Asian Full-Service Restaurants | | | | | | |
| --- Independent Asian Full-Service Restaurants | | | | | | |
| -- European Full-Service Restaurants | | | | | | |
| --- Chained European Full-Service Restaurants | | | | | | |
| --- Independent European Full-Service Restaurants | | | | | | |
| -- Latin American Full-Service Restaurants | | | | | | |
| --- Chained Latin American Full-Service Restaurants | | | | | | |
| --- Independent Latin American Full-Service Restaurants | | | | | | |
| -- Middle Eastern Full-Service Restaurants | | | | | | |
| --- Chained Middle Eastern Full-Service Restaurants | | | | | | |
| --- Independent Middle Eastern Full-Service Restaurants | | | | | | |
| -- North American Full-Service Restaurants | | | | | | |
| --- Chained North American Full-Service Restaurants | | | | | | |
| --- Independent North American Full-Service Restaurants | | | | | | |
| -- Pizza Full-Service Restaurants | | | | | | |
| --- Chained Pizza Full-Service Restaurants | | | | | | |
| --- Independent Pizza Full-Service Restaurants | | | | | | |
| -- Other Full-Service Restaurants | | | | | | |
| --- Chained Other Full-Service Restaurants | | | | | | |
| --- Independent Other Full-Service Restaurants | | | | | | |
| - Full-Service Restaurants by Type | | | | | | |

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 31 Sales in Full-Service Restaurants by Category: Foodservice Value 2016-2021

| AUD million | 2016 | 2017 | 2018 | 2019 | 2020 | 2021 |
|---|--------------------------|------|------|------|------|------|
| -- Asian Full-Service Restaurants | Data removed from sample | | | | | |
| --- Chained Asian Full-Service Restaurants | | | | | | |
| --- Independent Asian Full-Service Restaurants | | | | | | |
| -- European Full-Service Restaurants | | | | | | |
| --- Chained European Full-Service Restaurants | | | | | | |
| --- Independent European Full-Service Restaurants | | | | | | |
| -- Latin American Full-Service Restaurants | | | | | | |
| --- Chained Latin American Full-Service Restaurants | | | | | | |
| --- Independent Latin American Full-Service Restaurants | | | | | | |
| -- Middle Eastern Full-Service Restaurants | | | | | | |
| --- Chained Middle Eastern Full-Service Restaurants | | | | | | |
| --- Independent Middle Eastern Full-Service Restaurants | | | | | | |
| -- North American Full-Service Restaurants | | | | | | |
| --- Chained North American Full-Service Restaurants | | | | | | |
| --- Independent North American Full-Service Restaurants | | | | | | |
| -- Pizza Full-Service Restaurants | | | | | | |
| --- Chained Pizza Full-Service Restaurants | | | | | | |
| --- Independent Pizza Full-Service Restaurants | | | | | | |
| -- Other Full-Service Restaurants | | | | | | |
| --- Chained Other Full-Service Restaurants | | | | | | |
| --- Independent Other Full-Service Restaurants | | | | | | |
| - Full-Service Restaurants by Type | | | | | | |

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 32 Full-Service Restaurants by Category: % Units/Outlets Growth 2016-2021

| % Units/Outlets growth | 2020/21 | 2016-21 CAGR | 2016/21 Total |
|---|---------------------------------|--------------|---------------|
| -- Asian Full-Service Restaurants | Data removed from sample | | |
| --- Chained Asian Full-Service Restaurants | | | |
| --- Independent Asian Full-Service Restaurants | | | |
| -- European Full-Service Restaurants | | | |
| --- Chained European Full-Service Restaurants | | | |
| --- Independent European Full-Service Restaurants | | | |
| -- Latin American Full-Service Restaurants | | | |
| --- Chained Latin American Full-Service Restaurants | | | |
| --- Independent Latin American Full-Service Restaurants | | | |
| -- Middle Eastern Full-Service Restaurants | | | |
| --- Chained Middle Eastern Full-Service Restaurants | | | |
| --- Independent Middle Eastern Full-Service Restaurants | | | |
| -- North American Full-Service Restaurants | | | |
| --- Chained North American Full-Service Restaurants | | | |
| --- Independent North American Full-Service Restaurants | | | |
| -- Pizza Full-Service Restaurants | | | |
| --- Chained Pizza Full-Service Restaurants | | | |
| --- Independent Pizza Full-Service Restaurants | | | |
| -- Other Full-Service Restaurants | | | |
| --- Chained Other Full-Service Restaurants | | | |
| --- Independent Other Full-Service Restaurants | | | |
| - Full-Service Restaurants by Type | | | |

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 33 Sales in Full-Service Restaurants by Category: % Transaction Growth 2016-2021

| % transaction growth | 2020/21 | 2016-21 CAGR | 2016/21 Total |
|-----------------------------------|---------------------------------|--------------|---------------|
| -- Asian Full-Service Restaurants | Data removed from sample | | |

- Chained Asian Full-Service Restaurants
- Independent Asian Full-Service Restaurants
- European Full-Service Restaurants
- Chained European Full-Service Restaurants
- Independent European Full-Service Restaurants
- Latin American Full-Service Restaurants
- Chained Latin American Full-Service Restaurants
- Independent Latin American Full-Service Restaurants
- Middle Eastern Full-Service Restaurants
- Chained Middle Eastern Full-Service Restaurants
- Independent Middle Eastern Full-Service Restaurants
- North American Full-Service Restaurants
- Chained North American Full-Service Restaurants
- Independent North American Full-Service Restaurants
- Pizza Full-Service Restaurants
- Chained Pizza Full-Service Restaurants
- Independent Pizza Full-Service Restaurants
- Other Full-Service Restaurants
- Chained Other Full-Service Restaurants
- Independent Other Full-Service Restaurants
- Full-Service Restaurants by Type

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 34 Sales in Full-Service Restaurants by Category: % Foodservice Value Growth 2016-2021

% value growth

2020/21 2016-21 CAGR 2016/21 Total

- Asian Full-Service Restaurants
- Chained Asian Full-Service Restaurants
- Independent Asian Full-Service Restaurants
- European Full-Service Restaurants
- Chained European Full-Service Restaurants
- Independent European Full-Service Restaurants
- Latin American Full-Service Restaurants

Data removed from sample

- Chained Latin American Full-Service Restaurants
- Independent Latin American Full-Service Restaurants
- Middle Eastern Full-Service Restaurants
- Chained Middle Eastern Full-Service Restaurants
- Independent Middle Eastern Full-Service Restaurants
- North American Full-Service Restaurants
- Chained North American Full-Service Restaurants
- Independent North American Full-Service Restaurants
- Pizza Full-Service Restaurants
- Chained Pizza Full-Service Restaurants
- Independent Pizza Full-Service Restaurants
- Other Full-Service Restaurants
- Chained Other Full-Service Restaurants
- Independent Other Full-Service Restaurants
- Full-Service Restaurants by Type

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 35 GBO Company Shares in Chained Full-Service Restaurants: % Foodservice Value 2017-2021

| % value Company | 2017 | 2018 | 2019 | 2020 | 2021 |
|--------------------|------|------|------|------|------|
|--------------------|------|------|------|------|------|

Data removed from sample

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 36 GBN Brand Shares in Chained Full-Service Restaurants: % Foodservice Value
2018-2021

| % value | | | | | |
|---------|--------------------|------|------|------|------|
| Brand | Global Brand Owner | 2018 | 2019 | 2020 | 2021 |

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 37 Forecast Full-Service Restaurants by Category: Units/Outlets 2021-2026

| outlets | 2021 | 2022 | 2023 | 2024 | 2025 | 2026 |
|-----------------------------------|--------------------------|------|------|------|------|------|
| -- Asian Full-Service Restaurants | Data removed from sample | | | | | |
| --- Chained Asian Full- | | | | | | |

Service Restaurants
 --- Independent Asian
 Full-Service Restaurants
 -- European Full-
 Service Restaurants
 --- Chained European
 Full-Service Restaurants
 --- Independent
 European Full-Service
 Restaurants
 -- Latin American Full-
 Service Restaurants
 --- Chained Latin
 American Full-Service
 Restaurants
 --- Independent Latin
 American Full-Service
 Restaurants
 -- Middle Eastern Full-
 Service Restaurants
 --- Chained Middle
 Eastern Full-Service
 Restaurants
 --- Independent Middle
 Eastern Full-Service
 Restaurants
 -- North American Full-
 Service Restaurants
 --- Chained North
 American Full-Service
 Restaurants
 --- Independent North
 American Full-Service
 Restaurants
 -- Pizza Full-Service
 Restaurants
 --- Chained Pizza Full-
 Service Restaurants
 --- Independent Pizza
 Full-Service Restaurants
 -- Other Full-Service
 Restaurants
 --- Chained Other Full-
 Service Restaurants
 --- Independent Other
 Full-Service Restaurants
 - Full-Service
 Restaurants by Type

Data removed from sample

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 38 Forecast Sales in Full-Service Restaurants by Category: Number of Transactions 2021-2026

'000 transactions

| | 2021 | 2022 | 2023 | 2024 | 2025 | 2026 |
|-----------------------------------|--------------------------|------|------|------|------|------|
| -- Asian Full-Service Restaurants | Data removed from sample | | | | | |

- Chained Asian Full-Service Restaurants
- Independent Asian Full-Service Restaurants
- European Full-Service Restaurants
- Chained European Full-Service Restaurants
- Independent European Full-Service Restaurants
- Latin American Full-Service Restaurants
- Chained Latin American Full-Service Restaurants
- Independent Latin American Full-Service Restaurants
- Middle Eastern Full-Service Restaurants
- Chained Middle Eastern Full-Service Restaurants
- Independent Middle Eastern Full-Service Restaurants
- North American Full-Service Restaurants
- Chained North American Full-Service Restaurants
- Independent North American Full-Service Restaurants
- Pizza Full-Service Restaurants
- Chained Pizza Full-Service Restaurants
- Independent Pizza Full-Service Restaurants
- Other Full-Service Restaurants
- Chained Other Full-Service Restaurants
- Independent Other Full-Service Restaurants
- Full-Service Restaurants by Type

Data removed from sample

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 39 Forecast Sales in Full-Service Restaurants by Category: Foodservice Value
2021-2026

AUD million

| | 2021 | 2022 | 2023 | 2024 | 2025 | 2026 |
|-----------------------|--------------------------|------|------|------|------|------|
| -- Asian Full-Service | Data removed from sample | | | | | |

- Restaurants
- Chained Asian Full-Service Restaurants
- Independent Asian Full-Service Restaurants
- European Full-Service Restaurants
- Chained European Full-Service Restaurants
- Independent European Full-Service Restaurants
- Latin American Full-Service Restaurants
- Chained Latin American Full-Service Restaurants
- Independent Latin American Full-Service Restaurants
- Middle Eastern Full-Service Restaurants
- Chained Middle Eastern Full-Service Restaurants
- Independent Middle Eastern Full-Service Restaurants
- North American Full-Service Restaurants
- Chained North American Full-Service Restaurants
- Independent North American Full-Service Restaurants
- Pizza Full-Service Restaurants
- Chained Pizza Full-Service Restaurants
- Independent Pizza Full-Service Restaurants
- Other Full-Service Restaurants
- Chained Other Full-Service Restaurants
- Independent Other Full-Service Restaurants
- Full-Service Restaurants by Type

Data removed from sample

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 40 Forecast Full-Service Restaurants by Category: % Units/Outlets Growth 2021-2026

% Units/Outlets growth

2021/2022

2021-26 CAGR

2021/26 Total

- Asian Full-Service Restaurants
- Chained Asian Full-Service Restaurants
- Independent Asian Full-Service Restaurants
- European Full-Service Restaurants
- Chained European Full-Service Restaurants
- Independent European Full-Service Restaurants
- Latin American Full-Service Restaurants
- Chained Latin American Full-Service Restaurants
- Independent Latin American Full-Service Restaurants
- Middle Eastern Full-Service Restaurants
- Chained Middle Eastern Full-Service Restaurants
- Independent Middle Eastern Full-Service Restaurants
- North American Full-Service Restaurants
- Chained North American Full-Service Restaurants
- Independent North American Full-Service Restaurants
- Pizza Full-Service Restaurants
- Chained Pizza Full-Service Restaurants
- Independent Pizza Full-Service Restaurants
- Other Full-Service Restaurants
- Chained Other Full-Service Restaurants
- Independent Other Full-Service Restaurants
- Full-Service Restaurants by Type

Data removed from sample

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 41 Forecast Sales in Full-Service Restaurants by Category: % Transaction Growth 2021-2026

% transaction growth

2021/2022 2021-26 CAGR 2021/26 Total

- Asian Full-Service Restaurants
- Chained Asian Full-Service Restaurants
- Independent Asian Full-Service Restaurants
- European Full-Service Restaurants
- Chained European Full-Service Restaurants
- Independent European Full-Service Restaurants
- Latin American Full-Service

Data removed from sample

- Restaurants
- Chained Latin American Full-Service Restaurants
- Independent Latin American Full-Service Restaurants
- Middle Eastern Full-Service Restaurants
- Chained Middle Eastern Full-Service Restaurants
- Independent Middle Eastern Full-Service Restaurants
- North American Full-Service Restaurants
- Chained North American Full-Service Restaurants
- Independent North American Full-Service Restaurants
- Pizza Full-Service Restaurants
- Chained Pizza Full-Service Restaurants
- Independent Pizza Full-Service Restaurants
- Other Full-Service Restaurants
- Chained Other Full-Service Restaurants
- Independent Other Full-Service Restaurants
- Full-Service Restaurants by Type

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Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 42 Forecast Sales in Full-Service Restaurants by Category: % Foodservice Value Growth 2021-2026

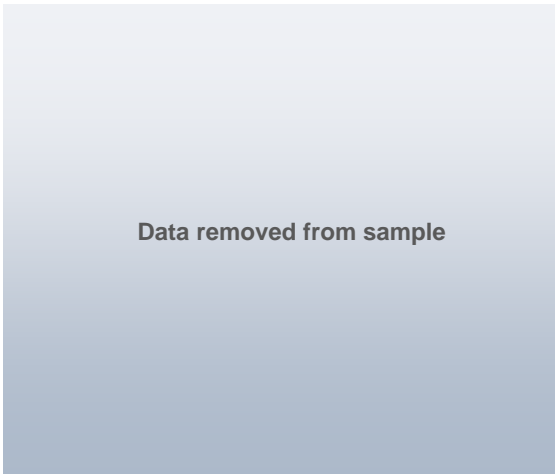
% value growth

2021/2022 2021-26 CAGR 2021/26 Total

- Asian Full-Service Restaurants
- Chained Asian Full-Service Restaurants
- Independent Asian Full-Service Restaurants
- European Full-Service Restaurants
- Chained European Full-Service Restaurants
- Independent European Full-Service Restaurants
- Latin American Full-Service Restaurants
- Chained Latin American Full-Service Restaurants
- Independent Latin American Full-Service Restaurants
- Middle Eastern Full-Service Restaurants
- Chained Middle Eastern Full-Service Restaurants
- Independent Middle Eastern Full-Service Restaurants

Data removed from sample

- North American Full-Service Restaurants
- Chained North American Full-Service Restaurants
- Independent North American Full-Service Restaurants
- Pizza Full-Service Restaurants
- Chained Pizza Full-Service Restaurants
- Independent Pizza Full-Service Restaurants
- Other Full-Service Restaurants
- Chained Other Full-Service Restaurants
- Independent Other Full-Service Restaurants
- Full-Service Restaurants by Type



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Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

LIMITED-SERVICE RESTAURANTS IN AUSTRALIA - CATEGORY ANALYSIS

KEY DATA FINDINGS

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2021 DEVELOPMENTS

Changing strategies and technology to leverage businesses

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Leaner is better as businesses adapt

Content removed from sample

Engage and indulge with flexible variety

Content removed from sample

Content removed from sample

PROSPECTS AND OPPORTUNITIES

Building capabilities and channels for wider outreach

Content removed from sample

Safety is the first priority for health of consumers and employees

Content removed from sample

Demand for plant-based options to spike further

Content removed from sample

Content removed from sample

CATEGORY DATA

Table 43 Limited-Service Restaurants by Category: Units/Outlets 2016-2021

| outlets | 2016 | 2017 | 2018 | 2019 | 2020 | 2021 |
|--|--------------------------|------|------|------|------|------|
| -- Asian Limited-Service Restaurants | Data removed from sample | | | | | |
| --- Chained Asian Limited-Service Restaurants | | | | | | |
| --- Independent Asian Limited-Service Restaurants | | | | | | |
| -- Bakery Products Limited-Service Restaurants | | | | | | |
| --- Chained Bakery Products Limited-Service Restaurants | | | | | | |
| --- Independent Bakery Products Limited-Service Restaurants | | | | | | |
| -- Burger Limited-Service Restaurants | | | | | | |
| --- Chained Burger Limited-Service Restaurants | | | | | | |
| --- Independent Burger Limited-Service Restaurants | | | | | | |
| -- Chicken Limited-Service Restaurants | | | | | | |
| --- Chained Chicken Limited-Service Restaurants | | | | | | |
| --- Independent Chicken Limited-Service Restaurants | | | | | | |
| -- Convenience Stores Limited-Service Restaurants | | | | | | |
| --- Chained Convenience Stores Limited-Service Restaurants | | | | | | |
| --- Independent Convenience Stores Limited-Service Restaurants | | | | | | |
| -- Fish Limited-Service | | | | | | |

Restaurants
 --- Chained Fish
 Limited-Service
 Restaurants
 --- Independent Fish
 Limited-Service
 Restaurants
 -- Ice Cream Limited-
 Service Restaurants
 --- Chained Ice Cream
 Limited-Service
 Restaurants
 --- Independent Ice
 Cream Limited-Service
 Restaurants
 -- Latin American
 Limited-Service
 Restaurants
 --- Chained Latin
 American Limited-
 Service Restaurants
 --- Independent Latin
 American Limited-
 Service Restaurants
 -- Middle Eastern
 Limited-Service
 Restaurants
 --- Chained Middle
 Eastern Limited-Service
 Restaurants
 --- Independent Middle
 Eastern Limited-Service
 Restaurants
 -- Pizza Limited-
 Service Restaurants
 --- Chained Pizza
 Limited-Service
 Restaurants
 --- Independent Pizza
 Limited-Service
 Restaurants
 -- Other Limited-
 Service Restaurants
 --- Chained Other
 Limited-Service
 Restaurants
 --- Independent Other
 Limited-Service
 Restaurants
 - Limited-Service
 Restaurants by Type

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 44 Sales in Limited-Service Restaurants by Category: Number of Transactions
 2016-2021

| | | | | | | |
|-------------------|------|------|------|------|------|------|
| '000 transactions | 2016 | 2017 | 2018 | 2019 | 2020 | 2021 |
|-------------------|------|------|------|------|------|------|

- Asian Limited-Service Restaurants
- Chained Asian Limited-Service Restaurants
- Independent Asian Limited-Service Restaurants
- Bakery Products Limited-Service Restaurants
- Chained Bakery Products Limited-Service Restaurants
- Independent Bakery Products Limited-Service Restaurants
- Burger Limited-Service Restaurants
- Chained Burger Limited-Service Restaurants
- Independent Burger Limited-Service Restaurants
- Chicken Limited-Service Restaurants
- Chained Chicken Limited-Service Restaurants
- Independent Chicken Limited-Service Restaurants
- Convenience Stores Limited-Service Restaurants
- Chained Convenience Stores Limited-Service Restaurants
- Independent Convenience Stores Limited-Service Restaurants
- Fish Limited-Service Restaurants
- Chained Fish Limited-Service Restaurants
- Independent Fish Limited-Service Restaurants
- Ice Cream Limited-Service Restaurants
- Chained Ice Cream Limited-Service Restaurants
- Independent Ice Cream Limited-Service Restaurants
- Latin American

Data removed from sample

- Limited-Service Restaurants
- Chained Latin American Limited-Service Restaurants
- Independent Latin American Limited-Service Restaurants
- Middle Eastern Limited-Service Restaurants
- Chained Middle Eastern Limited-Service Restaurants
- Independent Middle Eastern Limited-Service Restaurants
- Pizza Limited-Service Restaurants
- Chained Pizza Limited-Service Restaurants
- Independent Pizza Limited-Service Restaurants
- Other Limited-Service Restaurants
- Chained Other Limited-Service Restaurants
- Independent Other Limited-Service Restaurants
- Limited-Service Restaurants by Type

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 45 Sales in Limited-Service Restaurants by Category: Foodservice Value 2016-2021

AUD million

| | 2016 | 2017 | 2018 | 2019 | 2020 | 2021 |
|---|--------------------------|------|------|------|------|------|
| -- Asian Limited-Service Restaurants | Data removed from sample | | | | | |
| --- Chained Asian Limited-Service Restaurants | | | | | | |
| --- Independent Asian Limited-Service Restaurants | | | | | | |
| -- Bakery Products Limited-Service Restaurants | | | | | | |
| --- Chained Bakery Products Limited-Service Restaurants | | | | | | |
| --- Independent Bakery | | | | | | |

Products Limited-
 Service Restaurants
 -- Burger Limited-
 Service Restaurants
 --- Chained Burger
 Limited-Service
 Restaurants
 --- Independent Burger
 Limited-Service
 Restaurants
 -- Chicken Limited-
 Service Restaurants
 --- Chained Chicken
 Limited-Service
 Restaurants
 --- Independent Chicken
 Limited-Service
 Restaurants
 -- Convenience Stores
 Limited-Service
 Restaurants
 --- Chained Convenience
 Stores Limited-Service
 Restaurants
 --- Independent
 Convenience Stores
 Limited-Service
 Restaurants
 -- Fish Limited-Service
 Restaurants
 --- Chained Fish
 Limited-Service
 Restaurants
 --- Independent Fish
 Limited-Service
 Restaurants
 -- Ice Cream Limited-
 Service Restaurants
 --- Chained Ice Cream
 Limited-Service
 Restaurants
 --- Independent Ice
 Cream Limited-Service
 Restaurants
 -- Latin American
 Limited-Service
 Restaurants
 --- Chained Latin
 American Limited-
 Service Restaurants
 --- Independent Latin
 American Limited-
 Service Restaurants
 -- Middle Eastern
 Limited-Service
 Restaurants
 --- Chained Middle
 Eastern Limited-Service
 Restaurants
 --- Independent Middle
 Eastern Limited-Service

Data removed from sample

- Restaurants
- Pizza Limited-Service Restaurants
- Chained Pizza Limited-Service Restaurants
- Independent Pizza Limited-Service Restaurants
- Other Limited-Service Restaurants
- Chained Other Limited-Service Restaurants
- Independent Other Limited-Service Restaurants
- Limited-Service Restaurants by Type

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 46 Limited-Service Restaurants by Category: % Units/Outlets Growth 2016-2021

% Units/Outlets growth

2020/21 2016-21 CAGR 2016/21 Total

- Asian Limited-Service Restaurants
- Chained Asian Limited-Service Restaurants
- Independent Asian Limited-Service Restaurants
- Bakery Products Limited-Service Restaurants
- Chained Bakery Products Limited-Service Restaurants
- Independent Bakery Products Limited-Service Restaurants
- Burger Limited-Service Restaurants
- Chained Burger Limited-Service Restaurants
- Independent Burger Limited-Service Restaurants
- Chicken Limited-Service Restaurants
- Chained Chicken Limited-Service Restaurants
- Independent Chicken Limited-Service Restaurants
- Convenience Stores Limited-Service Restaurants
- Chained Convenience Stores Limited-Service Restaurants
- Independent Convenience Stores Limited-Service Restaurants
- Fish Limited-Service Restaurants
- Chained Fish Limited-Service Restaurants
- Independent Fish Limited-Service Restaurants

Data removed from sample

- Ice Cream Limited-Service Restaurants
- Chained Ice Cream Limited-Service Restaurants
- Independent Ice Cream Limited-Service Restaurants
- Latin American Limited-Service Restaurants
- Chained Latin American Limited-Service Restaurants
- Independent Latin American Limited-Service Restaurants
- Middle Eastern Limited-Service Restaurants
- Chained Middle Eastern Limited-Service Restaurants
- Independent Middle Eastern Limited-Service Restaurants
- Pizza Limited-Service Restaurants
- Chained Pizza Limited-Service Restaurants
- Independent Pizza Limited-Service Restaurants
- Other Limited-Service Restaurants
- Chained Other Limited-Service Restaurants
- Independent Other Limited-Service Restaurants
- Limited-Service Restaurants by Type

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 47 Sales in Limited-Service Restaurants by Category: % Transaction Growth 2016-2021

% transaction growth

2020/21 2016-21 CAGR 2016/21 Total

- Asian Limited-Service Restaurants
- Chained Asian Limited-Service Restaurants
- Independent Asian Limited-Service Restaurants
- Bakery Products Limited-Service Restaurants
- Chained Bakery Products Limited-Service Restaurants
- Independent Bakery Products Limited-Service Restaurants
- Burger Limited-Service Restaurants
- Chained Burger Limited-Service Restaurants
- Independent Burger Limited-Service Restaurants
- Chicken Limited-Service Restaurants
- Chained Chicken Limited-Service Restaurants
- Independent Chicken Limited-Service Restaurants
- Convenience Stores Limited-Service

Data removed from sample

- Restaurants
- Chained Convenience Stores Limited-Service Restaurants
- Independent Convenience Stores Limited-Service Restaurants
- Fish Limited-Service Restaurants
- Chained Fish Limited-Service Restaurants
- Independent Fish Limited-Service Restaurants
- Ice Cream Limited-Service Restaurants
- Chained Ice Cream Limited-Service Restaurants
- Independent Ice Cream Limited-Service Restaurants
- Latin American Limited-Service Restaurants
- Chained Latin American Limited-Service Restaurants
- Independent Latin American Limited-Service Restaurants
- Middle Eastern Limited-Service Restaurants
- Chained Middle Eastern Limited-Service Restaurants
- Independent Middle Eastern Limited-Service Restaurants
- Pizza Limited-Service Restaurants
- Chained Pizza Limited-Service Restaurants
- Independent Pizza Limited-Service Restaurants
- Other Limited-Service Restaurants
- Chained Other Limited-Service Restaurants
- Independent Other Limited-Service Restaurants
- Limited-Service Restaurants by Type

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 48 Sales in Limited-Service Restaurants by Category: % Foodservice Value Growth 2016-2021

% value growth

2020/21 2016-21 CAGR 2016/21 Total

- Asian Limited-Service Restaurants
- Chained Asian Limited-Service Restaurants
- Independent Asian Limited-Service Restaurants
- Bakery Products Limited-Service Restaurants
- Chained Bakery Products Limited-Service Restaurants
- Independent Bakery Products Limited-Service Restaurants
- Burger Limited-Service Restaurants

Data removed from sample

--- Chained Burger Limited-Service Restaurants
 --- Independent Burger Limited-Service Restaurants
 -- Chicken Limited-Service Restaurants
 --- Chained Chicken Limited-Service Restaurants
 --- Independent Chicken Limited-Service Restaurants
 -- Convenience Stores Limited-Service Restaurants
 --- Chained Convenience Stores Limited-Service Restaurants
 --- Independent Convenience Stores Limited-Service Restaurants
 -- Fish Limited-Service Restaurants
 --- Chained Fish Limited-Service Restaurants
 --- Independent Fish Limited-Service Restaurants
 -- Ice Cream Limited-Service Restaurants
 --- Chained Ice Cream Limited-Service Restaurants
 --- Independent Ice Cream Limited-Service Restaurants
 -- Latin American Limited-Service Restaurants
 --- Chained Latin American Limited-Service Restaurants
 --- Independent Latin American Limited-Service Restaurants
 -- Middle Eastern Limited-Service Restaurants
 --- Chained Middle Eastern Limited-Service Restaurants
 --- Independent Middle Eastern Limited-Service Restaurants
 -- Pizza Limited-Service Restaurants
 --- Chained Pizza Limited-Service Restaurants
 --- Independent Pizza Limited-Service Restaurants
 -- Other Limited-Service Restaurants
 --- Chained Other Limited-Service Restaurants
 --- Independent Other Limited-Service Restaurants
 - Limited-Service Restaurants by Type

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 49 GBO Company Shares in Chained Limited-Service Restaurants: % Foodservice Value 2017-2021

| % value Company | 2017 | 2018 | 2019 | 2020 | 2021 |
|--------------------|--------------------------|------|------|------|------|
| McDonald's Corp | Data removed from sample | | | | |
| Yum! Brands Inc | | | | | |

Restaurant Brands
 International Inc
 Domino's Pizza Inc
 Doctor's Associates Inc
 Craveable Brands Ltd
 Guzman y Gomez Pty Ltd
 Nando's Group Holdings
 Ltd
 Zambrero Pty Ltd
 Grill'd Pty Ltd
 Seven & I Holdings Co Ltd
 Retail Food Group Ltd
 Coles Group Ltd
 Caltex Australia Ltd
 Woolworths Group Ltd
 Foodco Group Pty Ltd
 Sushi Sushi (Melbourne)
 Pty Ltd
 Mad Mex International
 Pty Ltd
 British Petroleum Co
 Plc, The
 Schnitz Franchising Pty
 Ltd
 Retail Zoo Pty Ltd
 Rolld Australia Pty Ltd
 Noodle Box Pty Ltd
 Soul Origin Pty Ltd
 Franchised Food Co Pty
 Ltd
 PNF Management Pty Ltd
 Fishbowl Pty Ltd
 Supatreats Australia
 Pty Ltd
 Inspire Brands Inc
 Metcash Ltd
 Others
 Total

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 50 GBN Brand Shares in Chained Limited-Service Restaurants: % Foodservice Value 2018-2021

| % value Brand | Global Brand Owner | 2018 | 2019 | 2020 | 2021 |
|--------------------------|--------------------|------|------|------|------|
| Data removed from sample | | | | | |

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 51 Forecast Limited-Service Restaurants by Category: Units/Outlets 2021-2026

| outlets | 2021 | 2022 | 2023 | 2024 | 2025 | 2026 |
|---|--------------------------|------|------|------|------|------|
| -- Asian Limited-Service Restaurants | Data removed from sample | | | | | |
| --- Chained Asian Limited-Service Restaurants | | | | | | |
| --- Independent Asian Limited-Service Restaurants | | | | | | |
| -- Bakery Products Limited-Service Restaurants | | | | | | |
| --- Chained Bakery Products Limited-Service Restaurants | | | | | | |
| --- Independent Bakery Products Limited-Service Restaurants | | | | | | |
| -- Burger Limited-Service Restaurants | | | | | | |
| --- Chained Burger Limited-Service Restaurants | | | | | | |
| --- Independent Burger Limited-Service Restaurants | | | | | | |
| -- Coffee Limited-Service Restaurants | | | | | | |
| --- Chained Coffee Limited-Service Restaurants | | | | | | |
| --- Independent Coffee Limited-Service Restaurants | | | | | | |
| -- Fast Food Limited-Service Restaurants | | | | | | |
| --- Chained Fast Food Limited-Service Restaurants | | | | | | |
| --- Independent Fast Food Limited-Service Restaurants | | | | | | |

Restaurants
-- Chicken Limited-
Service Restaurants
--- Chained Chicken
Limited-Service
Restaurants
--- Independent Chicken
Limited-Service
Restaurants
-- Convenience Stores
Limited-Service
Restaurants
--- Chained Convenience
Stores Limited-Service
Restaurants
--- Independent
Convenience Stores
Limited-Service
Restaurants
-- Fish Limited-Service
Restaurants
--- Chained Fish
Limited-Service
Restaurants
--- Independent Fish
Limited-Service
Restaurants
-- Ice Cream Limited-
Service Restaurants
--- Chained Ice Cream
Limited-Service
Restaurants
--- Independent Ice
Cream Limited-Service
Restaurants
-- Latin American
Limited-Service
Restaurants
--- Chained Latin
American Limited-
Service Restaurants
--- Independent Latin
American Limited-
Service Restaurants
-- Middle Eastern
Limited-Service
Restaurants
--- Chained Middle
Eastern Limited-Service
Restaurants
--- Independent Middle
Eastern Limited-Service
Restaurants
-- Pizza Limited-
Service Restaurants
--- Chained Pizza
Limited-Service
Restaurants
--- Independent Pizza
Limited-Service
Restaurants

Data removed from sample

- Other Limited-Service Restaurants
- Chained Other Limited-Service Restaurants
- Independent Other Limited-Service Restaurants
- Limited-Service Restaurants by Type

Data removed from sample

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 52 Forecast Sales in Limited-Service Restaurants by Category: Number of Transactions 2021-2026

'000 transactions

2021 2022 2023 2024 2025 2026

- Asian Limited-Service Restaurants
- Chained Asian Limited-Service Restaurants
- Independent Asian Limited-Service Restaurants
- Bakery Products Limited-Service Restaurants
- Chained Bakery Products Limited-Service Restaurants
- Independent Bakery Products Limited-Service Restaurants
- Burger Limited-Service Restaurants
- Chained Burger Limited-Service Restaurants
- Independent Burger Limited-Service Restaurants
- Chicken Limited-Service Restaurants
- Chained Chicken Limited-Service Restaurants
- Independent Chicken Limited-Service Restaurants
- Convenience Stores Limited-Service Restaurants
- Chained Convenience Stores Limited-Service Restaurants
- Independent

Data removed from sample

Convenience Stores
 Limited-Service
 Restaurants
 -- Fish Limited-Service
 Restaurants
 --- Chained Fish
 Limited-Service
 Restaurants
 --- Independent Fish
 Limited-Service
 Restaurants
 -- Ice Cream Limited-
 Service Restaurants
 --- Chained Ice Cream
 Limited-Service
 Restaurants
 --- Independent Ice
 Cream Limited-Service
 Restaurants
 -- Latin American
 Limited-Service
 Restaurants
 --- Chained Latin
 American Limited-
 Service Restaurants
 --- Independent Latin
 American Limited-
 Service Restaurants
 -- Middle Eastern
 Limited-Service
 Restaurants
 --- Chained Middle
 Eastern Limited-Service
 Restaurants
 --- Independent Middle
 Eastern Limited-Service
 Restaurants
 -- Pizza Limited-
 Service Restaurants
 --- Chained Pizza
 Limited-Service
 Restaurants
 --- Independent Pizza
 Limited-Service
 Restaurants
 -- Other Limited-
 Service Restaurants
 --- Chained Other
 Limited-Service
 Restaurants
 --- Independent Other
 Limited-Service
 Restaurants
 - Limited-Service
 Restaurants by Type

Data removed from sample

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 53 Forecast Sales in Limited-Service Restaurants by Category: Foodservice Value
2021-2026

| AUD million | 2021 | 2022 | 2023 | 2024 | 2025 | 2026 |
|--|--------------------------|------|------|------|------|------|
| -- Asian Limited-Service Restaurants | Data removed from sample | | | | | |
| --- Chained Asian Limited-Service Restaurants | | | | | | |
| --- Independent Asian Limited-Service Restaurants | | | | | | |
| -- Bakery Products Limited-Service Restaurants | | | | | | |
| --- Chained Bakery Products Limited-Service Restaurants | | | | | | |
| --- Independent Bakery Products Limited-Service Restaurants | | | | | | |
| -- Burger Limited-Service Restaurants | | | | | | |
| --- Chained Burger Limited-Service Restaurants | | | | | | |
| --- Independent Burger Limited-Service Restaurants | | | | | | |
| -- Chicken Limited-Service Restaurants | | | | | | |
| --- Chained Chicken Limited-Service Restaurants | | | | | | |
| --- Independent Chicken Limited-Service Restaurants | | | | | | |
| -- Convenience Stores Limited-Service Restaurants | | | | | | |
| --- Chained Convenience Stores Limited-Service Restaurants | | | | | | |
| --- Independent Convenience Stores Limited-Service Restaurants | | | | | | |
| -- Fish Limited-Service Restaurants | | | | | | |
| --- Chained Fish Limited-Service Restaurants | | | | | | |
| --- Independent Fish Limited-Service Restaurants | | | | | | |
| -- Ice Cream Limited-Service Restaurants | | | | | | |
| --- Chained Ice Cream | | | | | | |

- Limited-Service Restaurants
- Independent Ice Cream Limited-Service Restaurants
- Latin American Limited-Service Restaurants
- Chained Latin American Limited-Service Restaurants
- Independent Latin American Limited-Service Restaurants
- Middle Eastern Limited-Service Restaurants
- Chained Middle Eastern Limited-Service Restaurants
- Independent Middle Eastern Limited-Service Restaurants
- Pizza Limited-Service Restaurants
- Chained Pizza Limited-Service Restaurants
- Independent Pizza Limited-Service Restaurants
- Other Limited-Service Restaurants
- Chained Other Limited-Service Restaurants
- Independent Other Limited-Service Restaurants
- Limited-Service Restaurants by Type

Data removed from sample

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 54 Forecast Limited-Service Restaurants by Category: % Units/Outlets Growth 2021-2026

% Units/Outlets growth

| | 2021/2022 | 2021-26 CAGR | 2021/26 Total |
|---|--------------------------|--------------|---------------|
| -- Asian Limited-Service Restaurants | Data removed from sample | | |
| --- Chained Asian Limited-Service Restaurants | | | |
| --- Independent Asian Limited-Service Restaurants | | | |
| -- Bakery Products Limited-Service Restaurants | | | |
| --- Chained Bakery Products Limited-Service Restaurants | | | |

- Independent Bakery Products Limited-Service Restaurants
- Burger Limited-Service Restaurants
- Chained Burger Limited-Service Restaurants
- Independent Burger Limited-Service Restaurants
- Chicken Limited-Service Restaurants
- Chained Chicken Limited-Service Restaurants
- Independent Chicken Limited-Service Restaurants
- Convenience Stores Limited-Service Restaurants
- Chained Convenience Stores Limited-Service Restaurants
- Independent Convenience Stores Limited-Service Restaurants
- Fish Limited-Service Restaurants
- Chained Fish Limited-Service Restaurants
- Independent Fish Limited-Service Restaurants
- Ice Cream Limited-Service Restaurants
- Chained Ice Cream Limited-Service Restaurants
- Independent Ice Cream Limited-Service Restaurants
- Latin American Limited-Service Restaurants
- Chained Latin American Limited-Service Restaurants
- Independent Latin American Limited-Service Restaurants
- Middle Eastern Limited-Service Restaurants
- Chained Middle Eastern Limited-Service Restaurants
- Independent Middle Eastern Limited-Service Restaurants
- Pizza Limited-Service Restaurants
- Chained Pizza Limited-Service Restaurants
- Independent Pizza Limited-Service Restaurants
- Other Limited-Service Restaurants
- Chained Other Limited-Service Restaurants
- Independent Other Limited-Service Restaurants
- Limited-Service Restaurants by Type

Data removed from sample

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 55 Forecast Sales in Limited-Service Restaurants by Category: % Transaction Growth 2021-2026

% transaction growth

2021/2022

2021-26 CAGR

2021/26 Total

- Asian Limited-Service Restaurants
- Chained Asian Limited-Service Restaurants
- Independent Asian Limited-Service Restaurants
- Bakery Products Limited-Service Restaurants
- Chained Bakery Products Limited-Service Restaurants
- Independent Bakery Products Limited-Service Restaurants
- Burger Limited-Service Restaurants
- Chained Burger Limited-Service Restaurants
- Independent Burger Limited-Service Restaurants
- Chicken Limited-Service Restaurants
- Chained Chicken Limited-Service Restaurants
- Independent Chicken Limited-Service Restaurants
- Convenience Stores Limited-Service Restaurants
- Chained Convenience Stores Limited-Service Restaurants
- Independent Convenience Stores Limited-Service Restaurants
- Fish Limited-Service Restaurants
- Chained Fish Limited-Service Restaurants
- Independent Fish Limited-Service Restaurants
- Ice Cream Limited-Service Restaurants
- Chained Ice Cream Limited-Service Restaurants
- Independent Ice Cream Limited-Service Restaurants
- Latin American Limited-Service Restaurants
- Chained Latin American Limited-Service Restaurants
- Independent Latin American Limited-Service Restaurants
- Middle Eastern Limited-Service Restaurants
- Chained Middle Eastern Limited-Service Restaurants
- Independent Middle Eastern Limited-Service Restaurants
- Pizza Limited-Service Restaurants
- Chained Pizza Limited-Service Restaurants
- Independent Pizza Limited-Service Restaurants
- Other Limited-Service Restaurants
- Chained Other Limited-Service Restaurants
- Independent Other Limited-Service Restaurants
- Limited-Service Restaurants by Type

Data removed from sample

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 56 Forecast Sales in Limited-Service Restaurants by Category: % Foodservice Value Growth 2021-2026

| % value growth | 2021/2022 | 2021-26 CAGR | 2021/26 Total |
|--|--------------------------|--------------|---------------|
| -- Asian Limited-Service Restaurants | Data removed from sample | | |
| --- Chained Asian Limited-Service Restaurants | | | |
| --- Independent Asian Limited-Service Restaurants | | | |
| -- Bakery Products Limited-Service Restaurants | | | |
| --- Chained Bakery Products Limited-Service Restaurants | | | |
| --- Independent Bakery Products Limited-Service Restaurants | | | |
| -- Burger Limited-Service Restaurants | | | |
| --- Chained Burger Limited-Service Restaurants | | | |
| --- Independent Burger Limited-Service Restaurants | | | |
| -- Chicken Limited-Service Restaurants | | | |
| --- Chained Chicken Limited-Service Restaurants | | | |
| --- Independent Chicken Limited-Service Restaurants | | | |
| -- Convenience Stores Limited-Service Restaurants | | | |
| --- Chained Convenience Stores Limited-Service Restaurants | | | |
| --- Independent Convenience Stores Limited-Service Restaurants | | | |
| -- Fish Limited-Service Restaurants | | | |
| --- Chained Fish Limited-Service Restaurants | | | |
| --- Independent Fish Limited-Service Restaurants | | | |
| -- Ice Cream Limited-Service Restaurants | | | |
| --- Chained Ice Cream Limited-Service Restaurants | | | |
| --- Independent Ice Cream Limited-Service Restaurants | | | |
| -- Latin American Limited-Service Restaurants | | | |
| --- Chained Latin American Limited-Service Restaurants | | | |
| --- Independent Latin American Limited-Service Restaurants | | | |
| -- Middle Eastern Limited-Service Restaurants | | | |
| --- Chained Middle Eastern Limited-Service Restaurants | | | |
| --- Independent Middle Eastern Limited-Service Restaurants | | | |
| -- Pizza Limited-Service Restaurants | | | |

- Chained Pizza Limited-Service Restaurants
- Independent Pizza Limited-Service Restaurants
- Other Limited-Service Restaurants
- Chained Other Limited-Service Restaurants
- Independent Other Limited-Service Restaurants
- Limited-Service Restaurants by Type

Data removed from sample

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

SELF-SERVICE CAFETERIAS IN AUSTRALIA - CATEGORY ANALYSIS

KEY DATA FINDINGS

Content removed from sample

2021 DEVELOPMENTS

Self-service cafeterias suffer from lack of footfall during the pandemic

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Food safety issues and hygiene concerns lead to further decline in sales

Content removed from sample

Social distancing poses challenges moving forward

Content removed from sample

PROSPECTS AND OPPORTUNITIES

Limited flexibility will continue to stunt growth of self-service cafeterias

Content removed from sample

Safety and hygiene are issues

Content removed from sample

Labour shortage and rising cost of goods add to the challenges

Content removed from sample

CATEGORY DATA

Table 57 Self-Service Cafeterias: Units/Outlets 2016-2021

| outlets | 2016 | 2017 | 2018 | 2019 | 2020 | 2021 |
|---------------------------------------|--------------------------|------|------|------|------|------|
| - Chained Self-Service Cafeterias | Data removed from sample | | | | | |
| - Independent Self-Service Cafeterias | | | | | | |
| Self-Service Cafeterias | | | | | | |

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 58 Sales in Self-Service Cafeterias: Number of Transactions 2016-2021

| '000 transactions | 2016 | 2017 | 2018 | 2019 | 2020 | 2021 |
|---------------------------------------|--|------|------|------|------|------|
| - Chained Self-Service Cafeterias | Data removed from sample | | | | | |
| - Independent Self-Service Cafeterias | | | | | | |
| Self-Service Cafeterias | | | | | | |
| Source: | Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources | | | | | |

Table 59 Sales in Self-Service Cafeterias: Foodservice Value 2016-2021

| AUD million | 2016 | 2017 | 2018 | 2019 | 2020 | 2021 |
|---------------------------------------|--|------|------|------|------|------|
| - Chained Self-Service Cafeterias | Data removed from sample | | | | | |
| - Independent Self-Service Cafeterias | | | | | | |
| Self-Service Cafeterias | | | | | | |
| Source: | Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources | | | | | |

Table 60 Sales in Self-Service Cafeterias: % Units/Outlets Growth 2016-2021

| % Units/Outlets growth | 2020/21 | 2016-21 CAGR | 2016/21 Total |
|---|--|--------------|---------------|
| - Chained Self-Service Cafeterias - Independent Self-Service Cafeterias Self-Service Cafeterias | Data removed from sample | | |
| Source: | Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources | | |

Table 61 Sales in Self-Service Cafeterias: % Transaction Growth 2016-2021

| % transaction growth | 2020/21 | 2016-21 CAGR | 2016/21 Total |
|---|--|--------------|---------------|
| - Chained Self-Service Cafeterias - Independent Self-Service Cafeterias Self-Service Cafeterias | Data removed from sample | | |
| Source: | Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources | | |

Table 62 Sales in Self-Service Cafeterias: % Foodservice Value Growth 2016-2021

| % value growth | 2020/21 | 2016-21 CAGR | 2016/21 Total |
|--|--------------------------|--------------|---------------|
| - Chained Self-Service Cafeterias - Independent Self-Service Cafeterias | Data removed from sample | | |

Self-Service Cafeterias

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 63 GBO Company Shares in Chained Self-Service Cafeterias: % Foodservice Value 2017-2021

| % value Company | 2017 | 2018 | 2019 | 2020 | 2021 |
|-----------------|------|------|------|------|------|
|-----------------|------|------|------|------|------|

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 64 GBN Brand Shares in Chained Self-Service Cafeterias: % Foodservice Value 2018-2021

| % value Brand | Global Brand Owner | 2018 | 2019 | 2020 | 2021 |
|---------------|--------------------|------|------|------|------|
|---------------|--------------------|------|------|------|------|

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 65 Forecast Self-Service Cafeterias: Units/Outlets 2021-2026

| outlets | 2021 | 2022 | 2023 | 2024 | 2025 | 2026 |
|---------|------|------|------|------|------|------|
|---------|------|------|------|------|------|------|

- Chained Self-Service Cafeterias
 - Independent Self-Service Cafeterias
 Self-Service Cafeterias

Data removed from sample

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 66 Forecast Sales in Self-Service Cafeterias: Number of Transactions 2021-2026

| '000 transactions | 2021 | 2022 | 2023 | 2024 | 2025 | 2026 |
|-------------------|------|------|------|------|------|------|
|-------------------|------|------|------|------|------|------|

- Chained Self-Service Cafeterias
 - Independent Self-Service Cafeterias
 Self-Service Cafeterias

Data removed from sample

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 67 Forecast Sales in Self-Service Cafeterias: Foodservice Value 2021-2026

| AUD million | 2021 | 2022 | 2023 | 2024 | 2025 | 2026 |
|---|--------------------------|------|------|------|------|------|
| - Chained Self-Service Cafeterias - Independent Self-Service Cafeterias Self-Service Cafeterias | Data removed from sample | | | | | |

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 68 Forecast Self-Service Cafeterias: % Units/Outlets Growth 2021-2026

| % Units/Outlets growth | 2021/2022 | 2021-26 CAGR | 2021/26 Total |
|---|--------------------------|--------------|---------------|
| - Chained Self-Service Cafeterias - Independent Self-Service Cafeterias Self-Service Cafeterias | Data removed from sample | | |

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 69 Forecast Sales in Self-Service Cafeterias: % Transaction Growth 2021-2026

| % transaction growth | 2021/2022 | 2021-26 CAGR | 2021/26 Total |
|---|--------------------------|--------------|---------------|
| - Chained Self-Service Cafeterias - Independent Self-Service Cafeterias Self-Service Cafeterias | Data removed from sample | | |

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 70 Forecast Sales in Self-Service Cafeterias: % Foodservice Value Growth 2021-2026

| % value growth | 2021/2022 | 2021-26 CAGR | 2021/26 Total |
|---|--------------------------|--------------|---------------|
| - Chained Self-Service Cafeterias - Independent Self-Service Cafeterias Self-Service Cafeterias | Data removed from sample | | |

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

STREET STALLS/KIOSKS IN AUSTRALIA - CATEGORY ANALYSIS

KEY DATA FINDINGS

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2021 DEVELOPMENTS

Agile players find growth opportunities

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Lockdown measures force many street stalls/kiosks to close

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No quick return to recovery for street stalls/kiosks

Content removed from sample

Content removed from sample

PROSPECTS AND OPPORTUNITIES

Opportunities for growth offered by charm of bubble tea

Content removed from sample

Flexibility helps businesses to survive

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Technological developments provide opportunities

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CATEGORY DATA

Table 71 Street Stalls/Kiosks: Units/Outlets 2016-2021

| outlets | 2016 | 2017 | 2018 | 2019 | 2020 | 2021 |
|---------------------------------------|--------------------------|------|------|------|------|------|
| - Chained Street Stalls/ Kiosks | Data removed from sample | | | | | |
| - Independent Street Stalls/Kiosks | | | | | | |
| Street Stalls/Kiosks | | | | | | |

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 72 Sales in Street Stalls/Kiosks: Number of Transactions 2016-2021

| '000 transactions | 2016 | 2017 | 2018 | 2019 | 2020 | 2021 |
|---------------------------------------|---------------------------------|------|------|------|------|------|
| - Chained Street Stalls/ Kiosks | Data removed from sample | | | | | |
| - Independent Street Stalls/Kiosks | | | | | | |
| Street Stalls/Kiosks | | | | | | |

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 73 Sales in Street Stalls/Kiosks: Foodservice Value 2016-2021

| AUD million | 2016 | 2017 | 2018 | 2019 | 2020 | 2021 |
|---------------------------------------|---------------------------------|------|------|------|------|------|
| - Chained Street Stalls/ Kiosks | Data removed from sample | | | | | |
| - Independent Street Stalls/Kiosks | | | | | | |
| Street Stalls/Kiosks | | | | | | |

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 74 Street Stalls/Kiosks: % Units/Outlets Growth 2016-2021

| % Units/Outlets growth | 2020/21 | 2016-21 CAGR | 2016/21 Total |
|------------------------------------|---------------------------------|--------------|---------------|
| - Chained Street Stalls/Kiosks | Data removed from sample | | |
| - Independent Street Stalls/Kiosks | | | |
| Street Stalls/Kiosks | | | |

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 75 Sales in Street Stalls/Kiosks: % Transaction Growth 2016-2021

| % transaction growth | 2020/21 | 2016-21 CAGR | 2016/21 Total |
|------------------------------------|---------------------------------|--------------|---------------|
| - Chained Street Stalls/Kiosks | Data removed from sample | | |
| - Independent Street Stalls/Kiosks | | | |
| Street Stalls/Kiosks | | | |

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 76 Sales in Street Stalls/Kiosks: % Foodservice Value Growth 2016-2021

| % value growth | 2020/21 | 2016-21 CAGR | 2016/21 Total |
|----------------|---------|--------------|---------------|
|----------------|---------|--------------|---------------|

- Chained Street Stalls/Kiosks
 - Independent Street Stalls/Kiosks
 Street Stalls/Kiosks

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 77 GBO Company Shares in Chained Street Stalls/Kiosks: % Foodservice Value
 2017-2021

| % value Company | 2017 | 2018 | 2019 | 2020 | 2021 |
|--------------------|------|------|------|------|------|
|--------------------|------|------|------|------|------|

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 78 GBN Brand Shares in Chained Street Stalls/Kiosks: % Foodservice Value 2018-
 2021

| % value Brand | Global Brand Owner | 2018 | 2019 | 2020 | 2021 |
|------------------|--------------------|------|------|------|------|
|------------------|--------------------|------|------|------|------|

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 79 Forecast Street Stalls/Kiosks: Units/Outlets 2021-2026

| outlets | 2021 | 2022 | 2023 | 2024 | 2025 | 2026 |
|---|--------------------------|------|------|------|------|------|
| - Chained Street Stalls/ Kiosks - Independent Street Stalls/Kiosks Street Stalls/Kiosks | Data removed from sample | | | | | |

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 80 Forecast Sales in Street Stalls/Kiosks: Number of Transactions 2021-2026

| '000 transactions | 2021 | 2022 | 2023 | 2024 | 2025 | 2026 |
|---|--------------------------|------|------|------|------|------|
| - Chained Street Stalls/ Kiosks - Independent Street Stalls/Kiosks Street Stalls/Kiosks | Data removed from sample | | | | | |

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 81 Forecast Sales in Street Stalls/Kiosks: Foodservice Value 2021-2026

| AUD million | 2021 | 2022 | 2023 | 2024 | 2025 | 2026 |
|---|--------------------------|------|------|------|------|------|
| - Chained Street Stalls/ Kiosks - Independent Street Stalls/Kiosks Street Stalls/Kiosks | Data removed from sample | | | | | |

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 82 Forecast Street Stalls/Kiosks: % Units/Outlets Growth 2021-2026

| % Units/Outlets growth | 2021/2022 | 2021-26 CAGR | 2021/26 Total |
|--|--------------------------|--------------|---------------|
| - Chained Street Stalls/Kiosks - Independent Street Stalls/Kiosks Street Stalls/Kiosks | Data removed from sample | | |

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 83 Forecast Sales in Street Stalls/Kiosks: % Transaction Growth 2021-2026

% transaction growth

| | 2021/2022 | 2021-26 CAGR | 2021/26 Total |
|------------------------------------|---|--------------|---------------|
| - Chained Street Stalls/Kiosks | Data removed from sample | | |
| - Independent Street Stalls/Kiosks | | | |
| Street Stalls/Kiosks | | | |
| Source: | Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources | | |

Table 84 Forecast Sales in Street Stalls/Kiosks: % Foodservice Value Growth 2021-2026

% value growth

| | 2021/2022 | 2021-26 CAGR | 2021/26 Total |
|------------------------------------|---|--------------|---------------|
| - Chained Street Stalls/Kiosks | Data removed from sample | | |
| - Independent Street Stalls/Kiosks | | | |
| Street Stalls/Kiosks | | | |
| Source: | Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources | | |

CONSUMER FOODSERVICE BY LOCATION IN AUSTRALIA - CATEGORY ANALYSIS

KEY DATA FINDINGS

Content removed from sample

2021 DEVELOPMENTS

Critical shortage of labour due to border restrictions impact foodservice

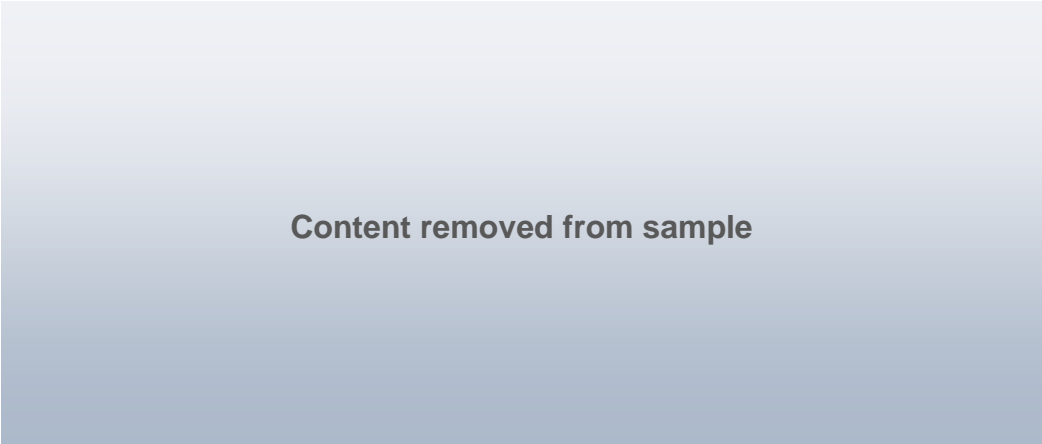
Content removed from sample

Changing strategies and technology to leverage businesses

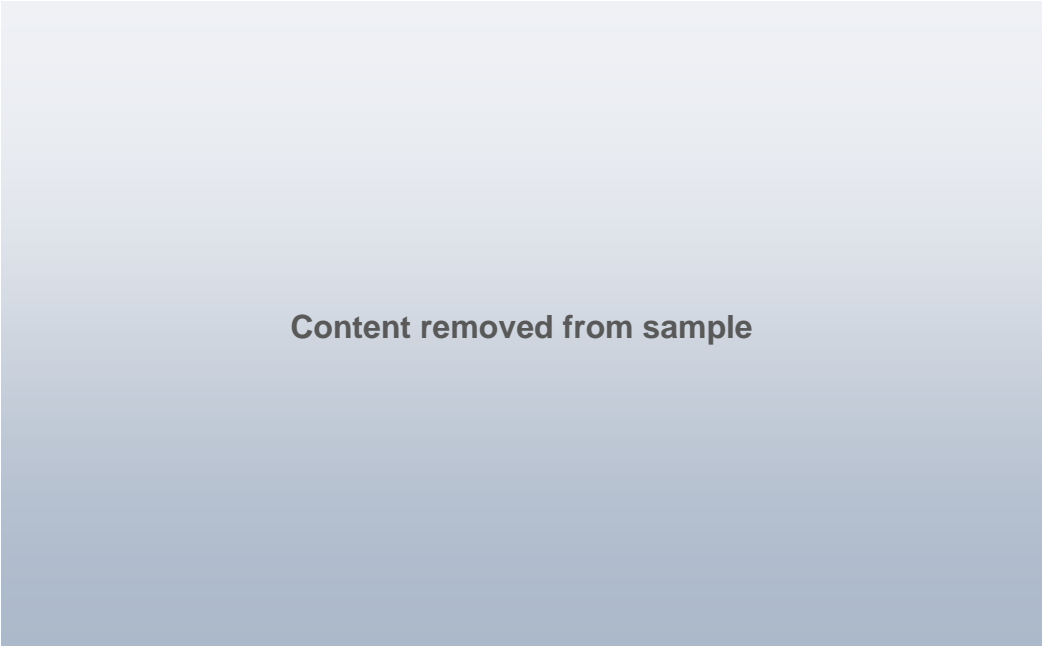
Content removed from sample

PROSPECTS AND OPPORTUNITIES

Technological developments provide growth opportunities



Demand for plant-based options to spike further



CATEGORY DATA

Table 85 Consumer Foodservice by Location: Units/Outlets 2016-2021

| outlets | 2016 | 2017 | 2018 | 2019 | 2020 | 2021 |
|--|--------------------------|------|------|------|------|------|
| Consumer Foodservice Through Standalone Consumer Foodservice | Data removed from sample | | | | | |

Through Leisure
Consumer Foodservice
Through Retail
Consumer Foodservice
Through Lodging
Consumer Foodservice
Through Travel
Consumer Foodservice by
Location

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 86 Sales in Consumer Foodservice by Location: Number of Transactions 2016-2021

'000 transactions

2016 2017 2018 2019 2020 2021

Consumer Foodservice
Through Standalone
Consumer Foodservice
Through Leisure
Consumer Foodservice
Through Retail
Consumer Foodservice
Through Lodging
Consumer Foodservice
Through Travel
Consumer Foodservice by
Location

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 87 Sales in Consumer Foodservice by Location: Foodservice Value 2016-2021

AUD million

2016 2017 2018 2019 2020 2021

Consumer Foodservice
Through Standalone
Consumer Foodservice
Through Leisure
Consumer Foodservice
Through Retail
Consumer Foodservice
Through Lodging
Consumer Foodservice
Through Travel
Consumer Foodservice by
Location

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 88 Consumer Foodservice by Location: % Units/Outlets Growth 2016-2021

% Units/Outlets growth

| | 2020/21 | 2016-21 CAGR | 2016/21 Total |
|---|--------------------------|--------------|---------------|
| Consumer Foodservice Through Standalone | Data removed from sample | | |
| Consumer Foodservice Through Leisure | | | |
| Consumer Foodservice Through Retail | | | |
| Consumer Foodservice Through Lodging | | | |
| Consumer Foodservice Through Travel | | | |
| Consumer Foodservice by Location | | | |

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 89 Sales in Consumer Foodservice by Location: % Transaction Growth 2016-2021

% transaction growth

| | 2020/21 | 2016-21 CAGR | 2016/21 Total |
|---|--------------------------|--------------|---------------|
| Consumer Foodservice Through Standalone | Data removed from sample | | |
| Consumer Foodservice Through Leisure | | | |
| Consumer Foodservice Through Retail | | | |
| Consumer Foodservice Through Lodging | | | |
| Consumer Foodservice Through Travel | | | |
| Consumer Foodservice by Location | | | |

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 90 Sales in Consumer Foodservice by Location: % Foodservice Value Growth 2016-2021

% value growth

| | 2020/21 | 2016-21 CAGR | 2016/21 Total |
|---|--------------------------|--------------|---------------|
| Consumer Foodservice Through Standalone | Data removed from sample | | |
| Consumer Foodservice Through Leisure | | | |
| Consumer Foodservice Through Retail | | | |
| Consumer Foodservice Through Lodging | | | |
| Consumer Foodservice Through Travel | | | |
| Consumer Foodservice by Location | | | |

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 91 Consumer Foodservice through Standalone: Units/Outlets 2016-2021

outlets

| | 2016 | 2017 | 2018 | 2019 | 2020 | 2021 |
|---|--------------------------|------|------|------|------|------|
| Consumer Foodservice Through Standalone | Data removed from sample | | | | | |

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 92 Sales in Consumer Foodservice through Standalone: Number of Transactions 2016-2021

'000 transactions

| | 2016 | 2017 | 2018 | 2019 | 2020 | 2021 |
|--|------|------|------|------|------|------|
|--|------|------|------|------|------|------|

| | | | | | | |
|---|---------------------------------|--|--|--|--|--|
| Consumer Foodservice Through Standalone | Data removed from sample | | | | | |
|---|---------------------------------|--|--|--|--|--|

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 93 Sales in Consumer Foodservice through Standalone: Foodservice Value 2016-2021

AUD million

| | 2016 | 2017 | 2018 | 2019 | 2020 | 2021 |
|--|------|------|------|------|------|------|
|--|------|------|------|------|------|------|

| | | | | | | |
|---|---------------------------------|--|--|--|--|--|
| Consumer Foodservice Through Standalone | Data removed from sample | | | | | |
|---|---------------------------------|--|--|--|--|--|

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 94 Consumer Foodservice through Standalone: % Units/Outlets Growth 2016-2021

% Units/Outlets growth

| | 2020/21 | 2016-21 CAGR | 2016/21 Total |
|--|---------|--------------|---------------|
|--|---------|--------------|---------------|

| | | | |
|---|---------------------------------|--|--|
| Consumer Foodservice Through Standalone | Data removed from sample | | |
|---|---------------------------------|--|--|

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 95 Sales in Consumer Foodservice through Standalone: % Transaction Growth 2016-2021

% transaction growth

| | 2020/21 | 2016-21 CAGR | 2016/21 Total |
|--|---------|--------------|---------------|
|--|---------|--------------|---------------|

| | | | |
|---|---------------------------------|--|--|
| Consumer Foodservice Through Standalone | Data removed from sample | | |
|---|---------------------------------|--|--|

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 96 Sales in Consumer Foodservice through Standalone: % Foodservice Value Growth 2016-2021

% value growth

| | 2020/21 | 2016-21 CAGR | 2016/21 Total |
|--|---------|--------------|---------------|
|--|---------|--------------|---------------|

| | | | |
|---|---------------------------------|--|--|
| Consumer Foodservice Through Standalone | Data removed from sample | | |
|---|---------------------------------|--|--|

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 97 Consumer Foodservice through Leisure: Units/Outlets 2016-2021

| outlets | 2016 | 2017 | 2018 | 2019 | 2020 | 2021 |
|--------------------------------------|--|------|------|------|------|------|
| Consumer Foodservice Through Leisure | Data removed from sample | | | | | |
| Source: | Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources | | | | | |

Table 98 Sales in Consumer Foodservice through Leisure: Number of Transactions 2016-2021

| '000 transactions | 2016 | 2017 | 2018 | 2019 | 2020 | 2021 |
|--------------------------------------|--|------|------|------|------|------|
| Consumer Foodservice Through Leisure | Data removed from sample | | | | | |
| Source: | Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources | | | | | |

Table 99 Sales in Consumer Foodservice through Leisure: Foodservice Value 2016-2021

| AUD million | 2016 | 2017 | 2018 | 2019 | 2020 | 2021 |
|--|--------------------------|------|------|------|------|------|
| Consumer Foodservice Through Leisure | Data removed from sample | | | | | |
| Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources | | | | | | |

Table 100 Consumer Foodservice through Leisure: % Units/Outlets Growth 2016-2021

| % Units/Outlets growth | 2020/21 | 2016-21 CAGR | 2016/21 Total |
|--|--------------------------|--------------|---------------|
| Consumer Foodservice Through Leisure | Data removed from sample | | |
| Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources | | | |

Table 101 Sales in Consumer Foodservice through Leisure: % Transaction Growth 2016-2021

| % transaction growth | 2020/21 | 2016-21 CAGR | 2016/21 Total |
|--|--------------------------|--------------|---------------|
| Consumer Foodservice Through Leisure | Data removed from sample | | |
| Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources | | | |

Table 102 Sales in Consumer Foodservice through Leisure: % Foodservice Value Growth 2016-2021

% value growth

2020/21 2016-21 CAGR 2016/21 Total

Consumer Foodservice Through Leisure

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 103 Consumer Foodservice through Retail: Units/Outlets 2016-2021

outlets

2016 2017 2018 2019 2020 2021

Consumer Foodservice
Through Retail

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 104 Sales in Consumer Foodservice through Retail: Number of Transactions 2016-2021

'000 transactions

2016 2017 2018 2019 2020 2021

Consumer Foodservice
Through Retail

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 105 Sales in Consumer Foodservice through Retail: Foodservice Value 2016-2021

AUD million

2016 2017 2018 2019 2020 2021

Consumer Foodservice
Through Retail

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 106 Consumer Foodservice through Retail: % Units/Outlets Growth 2016-2021

% Units/Outlets growth

2020/21 2016-21 CAGR 2016/21 Total

Consumer Foodservice Through Retail

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 107 Sales in Consumer Foodservice through Retail: % Transaction Growth 2016-2021

% transaction growth

| | 2020/21 | 2016-21 CAGR | 2016/21 Total |
|-------------------------------------|--------------------------|--------------|---------------|
| Consumer Foodservice Through Retail | Data removed from sample | | |

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 108 Sales in Consumer Foodservice through Retail: % Foodservice Value Growth 2016-2021

% value growth

| | 2020/21 | 2016-21 CAGR | 2016/21 Total |
|-------------------------------------|--------------------------|--------------|---------------|
| Consumer Foodservice Through Retail | Data removed from sample | | |

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 109 Consumer Foodservice through Lodging: Units/Outlets 2016-2021

outlets

| | 2016 | 2017 | 2018 | 2019 | 2020 | 2021 |
|--------------------------------------|--------------------------|------|------|------|------|------|
| Consumer Foodservice Through Lodging | Data removed from sample | | | | | |

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 110 Sales in Consumer Foodservice through Lodging: Number of Transactions 2016-2021

'000 transactions

| | 2016 | 2017 | 2018 | 2019 | 2020 | 2021 |
|--------------------------------------|--------------------------|------|------|------|------|------|
| Consumer Foodservice Through Lodging | Data removed from sample | | | | | |

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 111 Sales in Consumer Foodservice through Lodging: Foodservice Value 2016-2021

AUD million

| | 2016 | 2017 | 2018 | 2019 | 2020 | 2021 |
|--------------------------------------|--------------------------|------|------|------|------|------|
| Consumer Foodservice Through Lodging | Data removed from sample | | | | | |

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 112 Consumer Foodservice through Lodging: % Units/Outlets Growth 2016-2021

% Units/Outlets growth

| | 2020/21 | 2016-21 CAGR | 2016/21 Total |
|--------------------------------------|--------------------------|--------------|---------------|
| Consumer Foodservice Through Lodging | Data removed from sample | | |

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 113 Sales in Consumer Foodservice through Lodging: % Transaction Growth 2016-2021

% transaction growth

| | 2020/21 | 2016-21 CAGR | 2016/21 Total |
|--------------------------------------|--------------------------|--------------|---------------|
| Consumer Foodservice Through Lodging | Data removed from sample | | |

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 114 Sales in Consumer Foodservice through Lodging: % Foodservice Value Growth 2016-2021

% value growth

| | 2020/21 | 2016-21 CAGR | 2016/21 Total |
|--------------------------------------|--------------------------|--------------|---------------|
| Consumer Foodservice Through Lodging | Data removed from sample | | |

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 115 Consumer Foodservice through Travel: Units/Outlets 2016-2021

outlets

| | 2016 | 2017 | 2018 | 2019 | 2020 | 2021 |
|-------------------------------------|--------------------------|------|------|------|------|------|
| Consumer Foodservice Through Travel | Data removed from sample | | | | | |

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 116 Sales in Consumer Foodservice through Travel: Number of Transactions 2016-2021

'000 transactions

| | 2016 | 2017 | 2018 | 2019 | 2020 | 2021 |
|-------------------------------------|--------------------------|------|------|------|------|------|
| Consumer Foodservice Through Travel | Data removed from sample | | | | | |

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 117 Sales in Consumer Foodservice through Travel: Foodservice Value 2016-2021

AUD million

| | 2016 | 2017 | 2018 | 2019 | 2020 | 2021 |
|--|------|------|------|------|------|------|
|--|------|------|------|------|------|------|

Consumer Foodservice Through Travel

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 118 Consumer Foodservice through Travel: % Units/Outlets Growth 2016-2021

% Units/Outlets growth

2020/21 2016-21 CAGR 2016/21 Total

Consumer Foodservice Through Travel

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 119 Sales in Consumer Foodservice through Travel: % Transaction Growth 2016-2021

% transaction growth

2020/21 2016-21 CAGR 2016/21 Total

Consumer Foodservice Through Travel

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 120 Sales in Consumer Foodservice through Travel: % Foodservice Value Growth 2016-2021

% value growth

2020/21 2016-21 CAGR 2016/21 Total

Consumer Foodservice Through Travel

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, trade interviews, trade sources

Table 121 Forecast Consumer Foodservice by Location: Units/Outlets 2021-2026

outlets

2021 2022 2023 2024 2025 2026

Consumer Foodservice
Through Standalone
Consumer Foodservice
Through Leisure
Consumer Foodservice
Through Retail
Consumer Foodservice
Through Lodging
Consumer Foodservice
Through Travel
Consumer Foodservice by
Location

Data removed from sample

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 122 Forecast Sales in Consumer Foodservice by Location: Number of Transactions 2021-2026

| '000 transactions | 2021 | 2022 | 2023 | 2024 | 2025 | 2026 |
|---|--------------------------|------|------|------|------|------|
| Consumer Foodservice Through Standalone | Data removed from sample | | | | | |
| Consumer Foodservice Through Leisure | | | | | | |
| Consumer Foodservice Through Retail | | | | | | |
| Consumer Foodservice Through Lodging | | | | | | |
| Consumer Foodservice Through Travel | | | | | | |
| Consumer Foodservice by Location | | | | | | |

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 123 Forecast Sales in Consumer Foodservice by Location: Foodservice Value 2021-2026

| AUD million | 2021 | 2022 | 2023 | 2024 | 2025 | 2026 |
|---|--------------------------|------|------|------|------|------|
| Consumer Foodservice Through Standalone | Data removed from sample | | | | | |
| Consumer Foodservice Through Leisure | | | | | | |
| Consumer Foodservice Through Retail | | | | | | |
| Consumer Foodservice Through Lodging | | | | | | |
| Consumer Foodservice Through Travel | | | | | | |
| Consumer Foodservice by Location | | | | | | |

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 124 Forecast Consumer Foodservice by Location: % Units/Outlets Growth 2021-2026

| % Units/Outlets growth | 2021/2022 | 2021-26 CAGR | 2021/26 Total |
|---|--------------------------|--------------|---------------|
| Consumer Foodservice Through Standalone | Data removed from sample | | |
| Consumer Foodservice Through Leisure | | | |
| Consumer Foodservice Through Retail | | | |
| Consumer Foodservice Through Lodging | | | |
| Consumer Foodservice Through Travel | | | |

Consumer Foodservice by Location

Data removed from sample

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 125 Forecast Sales in Consumer Foodservice by Location: % Transaction Growth 2021-2026

% transaction growth

2021/2022 2021-26 CAGR 2021/26 Total

Consumer Foodservice Through Standalone
 Consumer Foodservice Through Leisure
 Consumer Foodservice Through Retail
 Consumer Foodservice Through Lodging
 Consumer Foodservice Through Travel
 Consumer Foodservice by Location

Data removed from sample

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 126 Forecast Sales in Consumer Foodservice by Location: % Foodservice Value Growth 2021-2026

% value growth

2021/2022 2021-26 CAGR 2021/26 Total

Consumer Foodservice Through Standalone
 Consumer Foodservice Through Leisure
 Consumer Foodservice Through Retail
 Consumer Foodservice Through Lodging
 Consumer Foodservice Through Travel
 Consumer Foodservice by Location

Data removed from sample

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 127 Forecast Consumer Foodservice through Standalone: Units/Outlets 2021-2026

outlets

2021 2022 2023 2024 2025 2026

Consumer Foodservice
 Through Standalone

Data removed from sample

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 128 Forecast Sales in Consumer Foodservice through Standalone: Number of Transactions 2021-2026

'000 transactions

2021 2022 2023 2024 2025 2026

Consumer Foodservice
 Through Standalone

Data removed from sample

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 129 Forecast Sales in Consumer Foodservice through Standalone: Foodservice Value 2021-2026

| AUD million | 2021 | 2022 | 2023 | 2024 | 2025 | 2026 |
|---|--------------------------|------|------|------|------|------|
| Consumer Foodservice Through Standalone | Data removed from sample | | | | | |

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 130 Forecast Consumer Foodservice through Standalone: % Units/Outlets Growth 2021-2026

| % Units/Outlets growth | 2021/2022 | 2021-26 CAGR | 2021/26 Total |
|---|--------------------------|--------------|---------------|
| Consumer Foodservice Through Standalone | Data removed from sample | | |

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 131 Forecast Sales in Consumer Foodservice through Standalone: % Transaction Growth 2021-2026

| % transaction growth | 2021/2022 | 2021-26 CAGR | 2021/26 Total |
|---|--------------------------|--------------|---------------|
| Consumer Foodservice Through Standalone | Data removed from sample | | |

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 132 Forecast Sales in Consumer Foodservice through Standalone: % Foodservice Value Growth 2021-2026

| % value growth | 2021/2022 | 2021-26 CAGR | 2021/26 Total |
|---|--------------------------|--------------|---------------|
| Consumer Foodservice Through Standalone | Data removed from sample | | |

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 133 Forecast Consumer Foodservice through Leisure: Units/Outlets 2021-2026

| outlets | 2021 | 2022 | 2023 | 2024 | 2025 | 2026 |
|--------------------------------------|--------------------------|------|------|------|------|------|
| Consumer Foodservice Through Leisure | Data removed from sample | | | | | |

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 134 Forecast Sales in Consumer Foodservice through Leisure: Number of Transactions 2021-2026

| '000 transactions | 2021 | 2022 | 2023 | 2024 | 2025 | 2026 |
|--------------------------------------|--------------------------|------|------|------|------|------|
| Consumer Foodservice Through Leisure | Data removed from sample | | | | | |

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 135 Forecast Sales in Consumer Foodservice through Leisure: Foodservice Value 2021-2026

| AUD million | 2021 | 2022 | 2023 | 2024 | 2025 | 2026 |
|--------------------------------------|--------------------------|------|------|------|------|------|
| Consumer Foodservice Through Leisure | Data removed from sample | | | | | |

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 136 Forecast Consumer Foodservice through Leisure: % Units/Outlets Growth 2021-2026

| % Units/Outlets growth | 2021/2022 | 2021-26 CAGR | 2021/26 Total |
|--------------------------------------|--------------------------|--------------|---------------|
| Consumer Foodservice Through Leisure | Data removed from sample | | |

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 137 Forecast Sales in Consumer Foodservice through Leisure: % Transaction Growth 2021-2026

| % transaction growth | 2021/2022 | 2021-26 CAGR | 2021/26 Total |
|--------------------------------------|--------------------------|--------------|---------------|
| Consumer Foodservice Through Leisure | Data removed from sample | | |

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 138 Forecast Sales in Consumer Foodservice through Leisure: % Foodservice Value Growth 2021-2026

| % value growth | 2021/2022 | 2021-26 CAGR | 2021/26 Total |
|--------------------------------------|--------------------------|--------------|---------------|
| Consumer Foodservice Through Leisure | Data removed from sample | | |

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 139 Forecast Consumer Foodservice through Retail: Units/Outlets 2021-2026

| outlets | 2021 | 2022 | 2023 | 2024 | 2025 | 2026 |
|-------------------------------------|--------------------------|------|------|------|------|------|
| Consumer Foodservice Through Retail | Data removed from sample | | | | | |

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 140 Forecast Sales in Consumer Foodservice through Retail: Number of Transactions 2021-2026

| '000 transactions | 2021 | 2022 | 2023 | 2024 | 2025 | 2026 |
|-------------------------------------|--------------------------|------|------|------|------|------|
| Consumer Foodservice Through Retail | Data removed from sample | | | | | |

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 141 Forecast Sales in Consumer Foodservice through Retail: Foodservice Value 2021-2026

| AUD million | 2021 | 2022 | 2023 | 2024 | 2025 | 2026 |
|-------------------------------------|--------------------------|------|------|------|------|------|
| Consumer Foodservice Through Retail | Data removed from sample | | | | | |

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 142 Forecast Consumer Foodservice through Retail: % Units/Outlets Growth 2021-2026

| % Units/Outlets growth | 2021/2022 | 2021-26 CAGR | 2021/26 Total |
|-------------------------------------|--------------------------|--------------|---------------|
| Consumer Foodservice Through Retail | Data removed from sample | | |

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 143 Forecast Sales in Consumer Foodservice through Retail: % Transaction Growth 2021-2026

| % transaction growth | 2021/2022 | 2021-26 CAGR | 2021/26 Total |
|-------------------------------------|--------------------------|--------------|---------------|
| Consumer Foodservice Through Retail | Data removed from sample | | |

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 144 Forecast Sales in Consumer Foodservice through Retail: % Foodservice Value Growth 2021-2026

% value growth

2021/2022 2021-26 CAGR 2021/26 Total

Consumer Foodservice Through Retail

Data removed from sample

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 145 Forecast Consumer Foodservice through Lodging: Units/Outlets 2021-2026

outlets

2021 2022 2023 2024 2025 2026

Consumer Foodservice
Through Lodging

Data removed from sample

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 146 Forecast Sales in Consumer Foodservice through Lodging: Number of Transactions 2021-2026

'000 transactions

2021 2022 2023 2024 2025 2026

Consumer Foodservice
Through Lodging

Data removed from sample

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 147 Forecast Sales in Consumer Foodservice through Lodging: Foodservice Value 2021-2026

AUD million

2021 2022 2023 2024 2025 2026

Consumer Foodservice
Through Lodging

Data removed from sample

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 148 Forecast Consumer Foodservice through Lodging: % Units/Outlets Growth 2021-2026

% Units/Outlets growth

2021/2022 2021-26 CAGR 2021/26 Total

Consumer Foodservice Through Lodging

Data removed from sample

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 149 Forecast Sales in Consumer Foodservice through Lodging: % Transaction Growth 2021-2026

| % transaction growth | 2021/2022 | 2021-26 CAGR | 2021/26 Total |
|--------------------------------------|--------------------------|--------------|---------------|
| Consumer Foodservice Through Lodging | Data removed from sample | | |

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 150 Forecast Sales in Consumer Foodservice through Lodging: % Foodservice Value Growth 2021-2026

| % value growth | 2021/2022 | 2021-26 CAGR | 2021/26 Total |
|--------------------------------------|--------------------------|--------------|---------------|
| Consumer Foodservice Through Lodging | Data removed from sample | | |

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 151 Forecast Consumer Foodservice through Travel: Units/Outlets 2021-2026

| outlets | 2021 | 2022 | 2023 | 2024 | 2025 | 2026 |
|-------------------------------------|--------------------------|------|------|------|------|------|
| Consumer Foodservice Through Travel | Data removed from sample | | | | | |

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 152 Forecast Sales in Consumer Foodservice through Travel: Number of Transactions 2021-2026

| '000 transactions | 2021 | 2022 | 2023 | 2024 | 2025 | 2026 |
|-------------------------------------|--------------------------|------|------|------|------|------|
| Consumer Foodservice Through Travel | Data removed from sample | | | | | |

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 153 Forecast Sales in Consumer Foodservice through Travel: Foodservice Value 2021-2026

| AUD million | 2021 | 2022 | 2023 | 2024 | 2025 | 2026 |
|-------------------------------------|--------------------------|------|------|------|------|------|
| Consumer Foodservice Through Travel | Data removed from sample | | | | | |

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 154 Forecast Consumer Foodservice through Travel: % Units/Outlets Growth 2021-2026

% Units/Outlets growth

2021/2022 2021-26 CAGR 2021/26 Total

Consumer Foodservice Through Travel

Data removed from sample

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 155 Forecast Sales in Consumer Foodservice through Travel: % Transaction Growth 2021-2026

% transaction growth

2021/2022 2021-26 CAGR 2021/26 Total

Consumer Foodservice Through Travel

Data removed from sample

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 156 Forecast Sales in Consumer Foodservice through Travel: % Foodservice Value Growth 2021-2026

% value growth

2021/2022 2021-26 CAGR 2021/26 Total

Consumer Foodservice Through Travel

Data removed from sample

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources