

# **Consumer Foodservice in New Zealand**

February 2024

**Table of Contents** 

## Consumer Foodservice in New Zealand

## EXECUTIVE SUMMARY

Consumer foodservice in 2023: The big picture 2023 key trends Competitive landscape Independent foodservice developments What next for consumer foodservice?

#### MARKET DATA

Table 1 - Units, Transactions and Value Sales in Consumer Foodservice 2018-2023
Table 2 - Units, Transactions and Value Sales in Consumer Foodservice: % Growth 2018-2023
Table 3 - Consumer Foodservice by Independent vs Chained by Type: Units/Outlets 2023
Table 4 - Consumer Foodservice by Independent vs Chained: % Foodservice Value 2018-2023
Table 5 - Sales in Consumer Foodservice by Food vs Drink Split: % Foodservice Value 2018-2023
Table 6 - Sales in Consumer Foodservice by Food vs Drink Split by Type: % Foodservice Value 2023
Table 7 - Sales in Consumer Foodservice by Location: % Foodservice Value 2018-2023
Table 8 - Sales in Consumer Foodservice by Fulfillment: % Foodservice Value 2018-2023
Table 9 - GBO Company Shares in Chained Consumer Foodservice: % Foodservice Value 2020-2023
Table 10 - GBN Brand Shares in Chained Consumer Foodservice: % Foodservice Value 2020-2023
Table 11 - GBN Brand Shares in Chained Consumer Foodservice: Units/Outlets 2023
Table 12 - Forecast Units, Transactions and Value Sales in Consumer Foodservice 2023-2028
Table 13 - Forecast Units, Transactions and Value Sales in Consumer Foodservice: % Growth 2023-2028

#### DISCLAIMER

SOURCES

Summary 1 - Research Sources

## Cafés/Bars in New Zealand

#### **KEY DATA FINDINGS**

#### 2023 DEVELOPMENTS

Chained coffee shops present tough competition for independent owners Staff shortages a concern for café and bar owners Egg shortages leave café owners struggling to maintain menus

## PROSPECTS AND OPPORTUNITIES

lced drinks could be a key trend due to appeal towards younger generations Bubble tea still has opportunity for growth in New Zealand Slowdown in delivery demand a good sign for cafés focused on in-house service

#### CATEGORY DATA

- Table 14 Cafés/Bars by Category: Units/Outlets 2018-2023
- Table 15 Sales in Cafés/Bars by Category: Number of Transactions 2018-2023
- Table 16 Sales in Cafés/Bars by Category: Foodservice Value 2018-2023
- Table 17 Cafés/Bars by Category: % Units/Outlets Growth 2018-2023
- Table 18 Sales in Cafés/Bars by Category: % Transaction Growth 2018-2023
- Table 19 Sales in Cafés/Bars by Category: % Foodservice Value Growth 2018-2023
- Table 20 GBO Company Shares in Chained Cafés/Bars: % Foodservice Value 2019-2023
- Table 21 GBN Brand Shares in Chained Cafés/Bars: % Foodservice Value 2020-2023
- Table 22 Forecast Cafés/Bars by Category: Units/Outlets 2023-2028
- Table 23 Forecast Sales in Cafés/Bars by Category: Number of Transactions 2023-2028

Table 24 - Forecast Sales in Cafés/Bars by Category: Foodservice Value 2023-2028Table 25 - Forecast Cafés/Bars by Category: % Units/Outlets Growth 2023-2028Table 26 - Forecast Sales in Cafés/Bars by Category: % Transaction Growth 2023-2028Table 27 - Forecast Sales in Cafés/Bars by Category: % Foodservice Value Growth 2023-2028

## Full-Service Restaurants in New Zealand

#### **KEY DATA FINDINGS**

## 2023 DEVELOPMENTS

Growth of full-service restaurants slow down amid high inflation Staff shortages a recurring issue for full-service restaurant owners Resurgence of tourism a boon for full-service restaurants

## PROSPECTS AND OPPORTUNITIES

Recovery expected as inflation starts to trend downwards QR code ordering to help deal with fewer staff in restaurants Delivery is here to stay and full-service needs to remain adaptable

## CATEGORY DATA

Table 28 - Full-Service Restaurants by Category: Units/Outlets 2018-2023
Table 29 - Sales in Full-Service Restaurants by Category: Number of Transactions 2018-2023
Table 30 - Sales in Full-Service Restaurants by Category: Foodservice Value 2018-2023
Table 31 - Full-Service Restaurants by Category: % Units/Outlets Growth 2018-2023
Table 32 - Sales in Full-Service Restaurants by Category: % Transaction Growth 2018-2023
Table 33 - Sales in Full-Service Restaurants by Category: % Foodservice Value Growth 2018-2023
Table 34 - GBO Company Shares in Chained Full-Service Restaurants: % Foodservice Value 2019-2023
Table 35 - GBN Brand Shares in Chained Full-Service Restaurants: % Foodservice Value 2020-2023
Table 36 - Forecast Full-Service Restaurants by Category: Units/Outlets 2023-2028
Table 37 - Forecast Sales in Full-Service Restaurants by Category: Number of Transactions 2023-2028
Table 38 - Forecast Sales in Full-Service Restaurants by Category: Foodservice Value 2023-2028
Table 39 - Forecast Sales in Full-Service Restaurants by Category: Number of Transactions 2023-2028
Table 39 - Forecast Sales in Full-Service Restaurants by Category: Foodservice Value 2023-2028
Table 39 - Forecast Sales in Full-Service Restaurants by Category: % Units/Outlets Growth 2023-2028
Table 40 - Forecast Sales in Full-Service Restaurants by Category: % Transaction Growth 2023-2028
Table 41 - Forecast Sales in Full-Service Restaurants by Category: % Foodservice Value Growth 2023-2028

## Limited-Service Restaurants in New Zealand

## KEY DATA FINDINGS

#### 2023 DEVELOPMENTS

Pizza limited-service restaurants among the strongest performers in 2023 Nene Chicken brings South Korean flavours to New Zealand Many categories struggle in 2023, with an increase in outlet closures

## PROSPECTS AND OPPORTUNITIES

Inflation to become more manageable in the next five years Consumers crave healthier and more sustainable food options Diversity of cuisines important to growth of the industry

#### CATEGORY DATA

Table 42 - Limited-Service Restaurants by Category: Units/Outlets 2018-2023Table 43 - Sales in Limited-Service Restaurants by Category: Number of Transactions 2018-2023Table 44 - Sales in Limited-Service Restaurants by Category: Foodservice Value 2018-2023Table 45 - Limited-Service Restaurants by Category: % Units/Outlets Growth 2018-2023

Table 46 - Sales in Limited-Service Restaurants by Category: % Transaction Growth 2018-2023Table 47 - Sales in Limited-Service Restaurants by Category: % Foodservice Value Growth 2018-2023Table 48 - GBO Company Shares in Chained Limited-Service Restaurants: % Foodservice Value 2019-2023Table 49 - GBN Brand Shares in Chained Limited-Service Restaurants: % Foodservice Value 2020-2023Table 50 - Forecast Limited-Service Restaurants by Category: Units/Outlets 2023-2028Table 51 - Forecast Sales in Limited-Service Restaurants by Category: Number of Transactions 2023-2028Table 52 - Forecast Sales in Limited-Service Restaurants by Category: Foodservice Value 2023-2028Table 53 - Forecast Limited-Service Restaurants by Category: % Units/Outlets Growth 2023-2028Table 54 - Forecast Sales in Limited-Service Restaurants by Category: % Transaction Growth 2023-2028Table 55 - Forecast Sales in Limited-Service Restaurants by Category: % Transaction Growth 2023-2028Table 55 - Forecast Sales in Limited-Service Restaurants by Category: % Transaction Growth 2023-2028Table 55 - Forecast Sales in Limited-Service Restaurants by Category: % Foodservice Value Growth 2023-2028

## Self-Service Cafeterias in New Zealand

## **KEY DATA FINDINGS**

## 2023 DEVELOPMENTS

Stagnant growth as category reaches market saturation Slow recovery of eat-in means less consumers interested in self-service cafeterias Food wastage a concern for buffet-style restaurants

## PROSPECTS AND OPPORTUNITIES

Consumer attitudes a key challenge for self-service cafeterias Innovation needed to create interest amid stagnant forecasted growth Innovative independents focusing on local and fresh ingredients will perform better than chained counterparts

## CATEGORY DATA

Table 56 - Self-Service Cafeterias: Units/Outlets 2018-2023
Table 57 - Sales in Self-Service Cafeterias: Number of Transactions 2018-2023
Table 58 - Sales in Self-Service Cafeterias: Foodservice Value 2018-2023
Table 59 - Sales in Self-Service Cafeterias: % Units/Outlets Growth 2018-2023
Table 60 - Sales in Self-Service Cafeterias: % Transaction Growth 2018-2023
Table 61 - Sales in Self-Service Cafeterias: % Foodservice Value Growth 2018-2023
Table 61 - Sales in Self-Service Cafeterias: % Foodservice Value Growth 2018-2023
Table 62 - GBO Company Shares in Chained Self-Service Cafeterias: % Foodservice Value 2019-2023
Table 63 - GBN Brand Shares in Chained Self-Service Cafeterias: % Foodservice Value 2020-2023
Table 64 - Forecast Self-Service Cafeterias: Units/Outlets 2023-2028

- Table 65 Forecast Sales in Self-Service Cafeterias: Number of Transactions 2023-2028
- Table 66 Forecast Sales in Self-Service Cafeterias: Foodservice Value 2023-2028
- Table 67 Forecast Self-Service Cafeterias: % Units/Outlets Growth 2023-2028
- Table 68 Forecast Sales in Self-Service Cafeterias: % Transaction Growth 2023-2028
- Table 69 Forecast Sales in Self-Service Cafeterias: % Foodservice Value Growth 2023-2028

## Street Stalls/Kiosks in New Zealand

## **KEY DATA FINDINGS**

#### 2023 DEVELOPMENTS

Street stalls struggle as consumers cut down on discretionary spending Social media helping to keep category alive for independent operators Operators shift to click-and-collect and online ordering to boost sales prospects

## PROSPECTS AND OPPORTUNITIES

Street stalls/kiosks category to shrink over the forecast period Reduced outlet numbers expected for the category in the next five years Sustainability and health awareness to influence menu items and packaging

## CATEGORY DATA

Table 70 - Street Stalls/Kiosks: Units/Outlets 2018-2023
Table 71 - Sales in Street Stalls/Kiosks: Number of Transactions 2018-2023
Table 72 - Sales in Street Stalls/Kiosks: Foodservice Value 2018-2023
Table 73 - Street Stalls/Kiosks: % Units/Outlets Growth 2018-2023
Table 74 - Sales in Street Stalls/Kiosks: % Transaction Growth 2018-2023
Table 75 - Sales in Street Stalls/Kiosks: % Foodservice Value Growth 2018-2023
Table 76 - GBO Company Shares in Chained Street Stalls/Kiosks: % Foodservice Value 2019-2023
Table 77 - GBN Brand Shares in Chained Street Stalls/Kiosks: % Foodservice Value 2020-2023
Table 78 - Forecast Street Stalls/Kiosks: Units/Outlets 2023-2028
Table 79 - Forecast Sales in Street Stalls/Kiosks: Foodservice Value 2023-2028
Table 80 - Forecast Street Stalls/Kiosks: % Units/Outlets Growth 2023-2028
Table 81 - Forecast Sales in Street Stalls/Kiosks: % Transaction Growth 2023-2028
Table 82 - Forecast Sales in Street Stalls/Kiosks: % Transaction Growth 2023-2028

Table 83 - Forecast Sales in Street Stalls/Kiosks: % Foodservice Value Growth 2023-2028

#### Consumer Foodservice By Location in New Zealand

#### **KEY DATA FINDINGS**

#### 2023 DEVELOPMENTS

Consumer foodservice through travel leads non-standalone growth Consumer foodservice through standalone experiences a slight decline

#### PROSPECTS AND OPPORTUNITIES

Leisure locations forecasted as the next growth frontier Standalone outlets expected to maintain steady growth

#### CATEGORY DATA

Table 84 - Consumer Foodservice by Location: Units/Outlets 2018-2023 Table 85 - Sales in Consumer Foodservice by Location: Number of Transactions 2018-2023 Table 86 - Sales in Consumer Foodservice by Location: Foodservice Value 2018-2023 Table 87 - Consumer Foodservice by Location: % Units/Outlets Growth 2018-2023 Table 88 - Sales in Consumer Foodservice by Location: % Transaction Growth 2018-2023 Table 89 - Sales in Consumer Foodservice by Location: % Foodservice Value Growth 2018-2023 Table 90 - Consumer Foodservice through Standalone: Units/Outlets 2018-2023 Table 91 - Sales in Consumer Foodservice through Standalone: Number of Transactions 2018-2023 Table 92 - Sales in Consumer Foodservice through Standalone: Foodservice Value 2018-2023 Table 93 - Consumer Foodservice through Standalone: % Units/Outlets Growth 2018-2023 Table 94 - Sales in Consumer Foodservice through Standalone: % Transaction Growth 2018-2023 Table 95 - Sales in Consumer Foodservice through Standalone: % Foodservice Value Growth 2018-2023 Table 96 - Consumer Foodservice through Leisure: Units/Outlets 2018-2023 Table 97 - Sales in Consumer Foodservice through Leisure: Number of Transactions 2018-2023 Table 98 - Sales in Consumer Foodservice through Leisure: Foodservice Value 2018-2023 Table 99 - Consumer Foodservice through Leisure: % Units/Outlets Growth 2018-2023 Table 100 - Sales in Consumer Foodservice through Leisure: % Transaction Growth 2018-2023 Table 101 - Sales in Consumer Foodservice through Leisure: % Foodservice Value Growth 2018-2023 Table 102 - Consumer Foodservice through Retail: Units/Outlets 2018-2023 Table 103 - Sales in Consumer Foodservice through Retail: Number of Transactions 2018-2023 Table 104 - Sales in Consumer Foodservice through Retail: Foodservice Value 2018-2023 Table 105 - Consumer Foodservice through Retail: % Units/Outlets Growth 2018-2023 Table 106 - Sales in Consumer Foodservice through Retail: % Transaction Growth 2018-2023

 Table 107 - Sales in Consumer Foodservice through Retail: % Foodservice Value Growth 2018-2023

Table 108 - Consumer Foodservice through Lodging: Units/Outlets 2018-2023 Table 109 - Sales in Consumer Foodservice through Lodging: Number of Transactions 2018-2023 Table 110 - Sales in Consumer Foodservice through Lodging: Foodservice Value 2018-2023 Table 111 - Consumer Foodservice through Lodging: % Units/Outlets Growth 2018-2023 Table 112 - Sales in Consumer Foodservice through Lodging: % Transaction Growth 2018-2023 Table 113 - Sales in Consumer Foodservice through Lodging: % Foodservice Value Growth 2018-2023 Table 114 - Consumer Foodservice through Travel: Units/Outlets 2018-2023 Table 115 - Sales in Consumer Foodservice through Travel: Number of Transactions 2018-2023 Table 116 - Sales in Consumer Foodservice through Travel: Foodservice Value 2018-2023 Table 117 - Consumer Foodservice through Travel: % Units/Outlets Growth 2018-2023 Table 118 - Sales in Consumer Foodservice through Travel: % Transaction Growth 2018-2023 Table 119 - Sales in Consumer Foodservice through Travel: % Foodservice Value Growth 2018-2023 Table 120 - Forecast Consumer Foodservice by Location: Units/Outlets 2023-2028 Table 121 - Forecast Sales in Consumer Foodservice by Location: Number of Transactions 2023-2028 Table 122 - Forecast Sales in Consumer Foodservice by Location: Foodservice Value 2023-2028 Table 123 - Forecast Consumer Foodservice by Location: % Units/Outlets Growth 2023-2028 Table 124 - Forecast Sales in Consumer Foodservice by Location: % Transaction Growth 2023-2028 Table 125 - Forecast Sales in Consumer Foodservice by Location: % Foodservice Value Growth 2023-2028 Table 126 - Forecast Consumer Foodservice through Standalone: Units/Outlets 2023-2028 Table 127 - Forecast Sales in Consumer Foodservice through Standalone: Number of Transactions 2023-2028 Table 128 - Forecast Sales in Consumer Foodservice through Standalone: Foodservice Value 2023-2028 Table 129 - Forecast Consumer Foodservice through Standalone: % Units/Outlets Growth 2023-2028 Table 130 - Forecast Sales in Consumer Foodservice through Standalone: % Transaction Growth 2023-2028 Table 131 - Forecast Sales in Consumer Foodservice through Standalone: % Foodservice Value Growth 2023-2028 Table 132 - Forecast Consumer Foodservice through Leisure: Units/Outlets 2023-2028 Table 133 - Forecast Sales in Consumer Foodservice through Leisure: Number of Transactions 2023-2028 Table 134 - Forecast Sales in Consumer Foodservice through Leisure: Foodservice Value 2023-2028 Table 135 - Forecast Consumer Foodservice through Leisure: % Units/Outlets Growth 2023-2028 Table 136 - Forecast Sales in Consumer Foodservice through Leisure: % Transaction Growth 2023-2028 Table 137 - Forecast Sales in Consumer Foodservice through Leisure: % Foodservice Value Growth 2023-2028 Table 138 - Forecast Consumer Foodservice through Retail: Units/Outlets 2023-2028 Table 139 - Forecast Sales in Consumer Foodservice through Retail: Number of Transactions 2023-2028 Table 140 - Forecast Sales in Consumer Foodservice through Retail: Foodservice Value 2023-2028 Table 141 - Forecast Consumer Foodservice through Retail: % Units/Outlets Growth 2023-2028 Table 142 - Forecast Sales in Consumer Foodservice through Retail: % Transaction Growth 2023-2028 Table 143 - Forecast Sales in Consumer Foodservice through Retail: % Foodservice Value Growth 2023-2028 Table 144 - Forecast Consumer Foodservice through Lodging: Units/Outlets 2023-2028 Table 145 - Forecast Sales in Consumer Foodservice through Lodging: Number of Transactions 2023-2028 Table 146 - Forecast Sales in Consumer Foodservice through Lodging: Foodservice Value 2023-2028 Table 147 - Forecast Consumer Foodservice through Lodging: % Units/Outlets Growth 2023-2028 Table 148 - Forecast Sales in Consumer Foodservice through Lodging: % Transaction Growth 2023-2028 Table 149 - Forecast Sales in Consumer Foodservice through Lodging: % Foodservice Value Growth 2023-2028 Table 150 - Forecast Consumer Foodservice through Travel: Units/Outlets 2023-2028 Table 151 - Forecast Sales in Consumer Foodservice through Travel: Number of Transactions 2023-2028 Table 152 - Forecast Sales in Consumer Foodservice through Travel: Foodservice Value 2023-2028 Table 153 - Forecast Consumer Foodservice through Travel: % Units/Outlets Growth 2023-2028 Table 154 - Forecast Sales in Consumer Foodservice through Travel: % Transaction Growth 2023-2028 Table 155 - Forecast Sales in Consumer Foodservice through Travel: % Foodservice Value Growth 2023-2028

## About Euromonitor International

Euromonitor International is an independent market intelligence provider. Data, insight and analysis stem from in-the-field research

#### spanning 210 national markets.

Content ranges from the in-depth and country-specific, to key strategic themes with a global range and significance. Products cover a comprehensive range of insights and market data, but can be broadly categorised as:

- Strategy Briefings: Global or regional in scope, and focussing on the most important themes shaping consumer demand, the key markets, competitive environment and future outlook across a range of industries.
- Company Profiles: Analysis dedicated to the world's most significant companies, with detailed insight into their activities, focus of operations, their competitors, their geographic presence and performance.
- Country Reports: For an in-depth understanding of specific countries, whether by industry, economic metrics or consumer trends and lifestyles. These reports cover current trends, consumer demand, market potential and future prospects, with country-specific local insight and comprehensive data, unavailable elsewhere.

For more information on this report, further enquiries can be directed via this link www.euromonitor.com/consumer-foodservice-in-new-zealand/report.