

AUSTRALIAN FOODSERVICE

MARKET SIZE - MARKET STRUCTURE - MARKET INSIGHTS
A CONTINUOUS INFORMATION SERVICE



www.fiforesight.com

THE AUSTRALIAN FOODSERVICE MARKET

IS UNIQUE WITH ITS PLETHORA OF DIFFERENT CUISINES WHICH EVERYONE CALLS THEIR OWN! THE MARKET HAS SEEN AN ENORMOUS DEVELOPMENT OVER THE PAST DECADES; WHEN EATING OUT WITH FRIENDS AND FAMILY IS A WAY OF EVERYDAY LIFE AMONG ALL SOCIO ECONOMIC GROUPS ACROSS THIS VAST CONTINENT.



Australia is a nation that loves their independent, often local, Restaurants and Cafés, their local Pub and their local Club as well as their Independent Fast Food outlet whether that is for breakfast, a sandwich, salad or burger for lunch or a Thai dinner. The **Australian Foodservice market** is not a chain market but a **market of independent operators and outlets offering a vast array of eating-out options; competing for a growing Foodservice Dollar in six distinct foodservice regions.**

Across the nation, more than 80% of all Commercial Foodservice outlets are independent, individually owned.

Australian Foodservice (AFS) – its databases and reports – are delivered annually.

Data collection and research is conducted continually during 11.5 months per year in statistically correct sample sizes among operators across all Commercial & Institutional Channels nationwide. **Primary market size data** is collected in accordance with the principle of Moving Annual Totals, providing **annualised procurement data of food and non-alcoholic beverages among all foodservice operators**. This naturally includes regular and extensive **qualitative** research conducted by **Food Industry Foresight's own team of field researchers**.



The following outlines the various databases and reports available as part of Australian Foodservice. All databases and reports are delivered via confidential access to **Food Industry Foresight's Information Portal** for subscribing companies.

SUBSCRIPTION

- **Subscription to AFS Market Size is per Product Category. Subscription includes one half-day presentation & workshop with Food Industry Foresight**
- **Subscription to AFS Market Structure delivers an Outlet Number Database and an Outlet Number Analysis Report**
- **Subscription to AFS Market Insights is per Channel Insight Report**
- **Confidential access to FIF's Information Portal is valid for one year from date of subscription**



FOODSERVICE MARKET SIZE

- I. **PRODUCT CATEGORY MARKET SIZE DATABASES**
- II. **PRODUCT CATEGORY ANALYSIS REPORTS**

1. MARKET SIZE DATABASES

The market size databases are presented by each of the eleven main product categories & products listed below. (Please see pages 13-14 for further details)

MEAT, POULTRY, FISH & SEAFOOD
FRUIT & VEGETABLES
BREADS, PASTA, CEREALS & BISCUITS
CAKES & DESSERTS
PREPARED MEALS, SNACKS & SOUPS
SAUCES, CONDIMENTS, INGREDIENTS, HERBS &
DRESSINGS
FATS & OILS
SPREADS & JAMS
DAIRY PRODUCTS
BEVERAGES

EACH OF THE DATABASES PROVIDE:

- 1. TOTAL MARKET SIZE BY VOLUME in kilos** – broken down by product group & product for the Commercial and Institutional Foodservice Sectors
- 2. COMMERCIAL MARKET SIZE BY VOLUME in kilos** – broken down by product group & product, by Commercial channel
- 3. INSTITUTIONAL MARKET SIZE BY VOLUME in kilos** – broken down by product group & product, by Institutional channel
- 4. TOTAL MARKET SIZE BY VALUE in AUD** – broken down by product group & product for the Commercial and Institutional Foodservice Sectors
- 5. COMMERCIAL MARKET SIZE VALUE in AUD** – broken down by product group & product, by Commercial channel
- 6. INSTITUTIONAL MARKET SIZE VALUE in AUD** – broken down by product group & product, by Institutional channel
- 7. PRODUCT CONSUMPTION INDEX – PCI:** Average volume of product used per outlet per week in kilos – broken down by product, by foodservice channel





II. PRODUCT CATEGORY ANALYSIS REPORTS

Each of the product category reports presents an extensive analysis of the total market size database for the category:

- By volume & value



- By Commercial & Institutional sectors and channels



- By product groups & products



FOODSERVICE MARKET STRUCTURE

- I. OUTLET NUMBERS DATABASE
- II. OUTLET NUMBERS ANALYSIS REPORT

I. OUTLET NUMBERS DATABASE

The Outlet Number Database provides **total outlet numbers** by:

- By Commercial & Institutional **sector**
- By Commercial & Institutional **channel by state**
- Annual Commercial & Institutional channel compound **growth/decline rates** from 2013
- **Major QSR Chains** (50+ outlets) by region from 2019
- **Minor QSR Chains** (5-49 outlets) by region from 2019
- **Snack Food Chains** by region from 2019
- **Café/Coffee Chains** by region from 2019
- **Restaurant Chains** by region from 2019



II. OUTLET NUMBERS ANALYSIS REPORTS

The outlet numbers report is an in-depth analysis of the total outlet numbers in Australia:

By Commercial
& Institutional
foodservice sector

By Commercial
& Institutional
foodservice channel
by state & territory

Outlet number
penetration rates
by Commercial &
Institutional channel and
development over the
five last years

Outlet number
developments by
Commercial & Institutional
channel in the last five
years

State & territory
analysis by Commercial
& Institutional sector by
channel

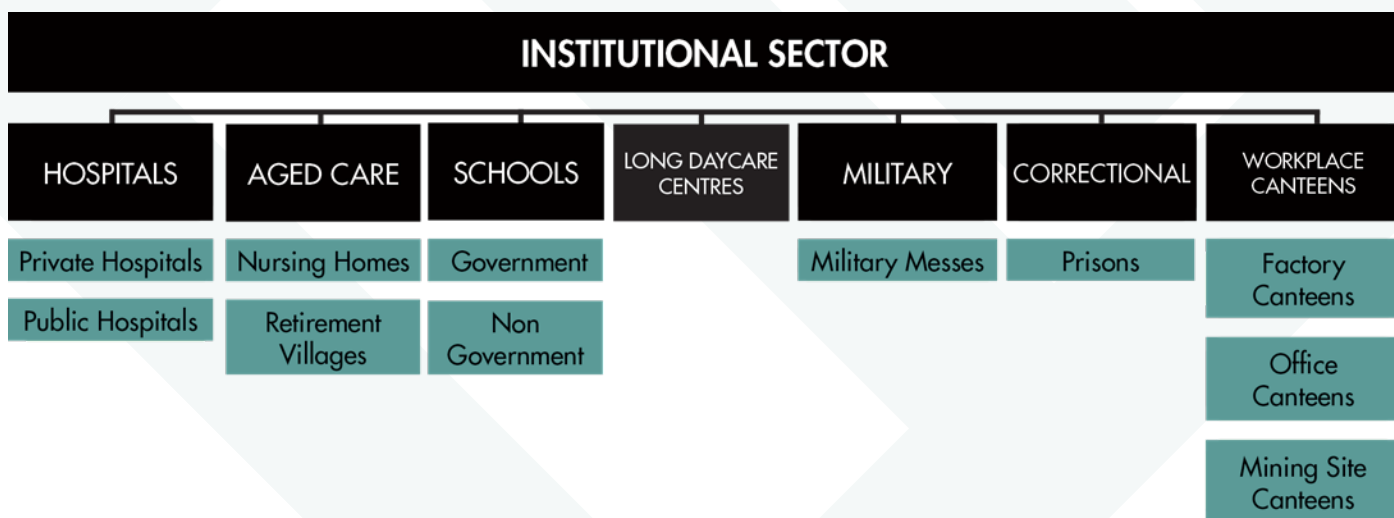
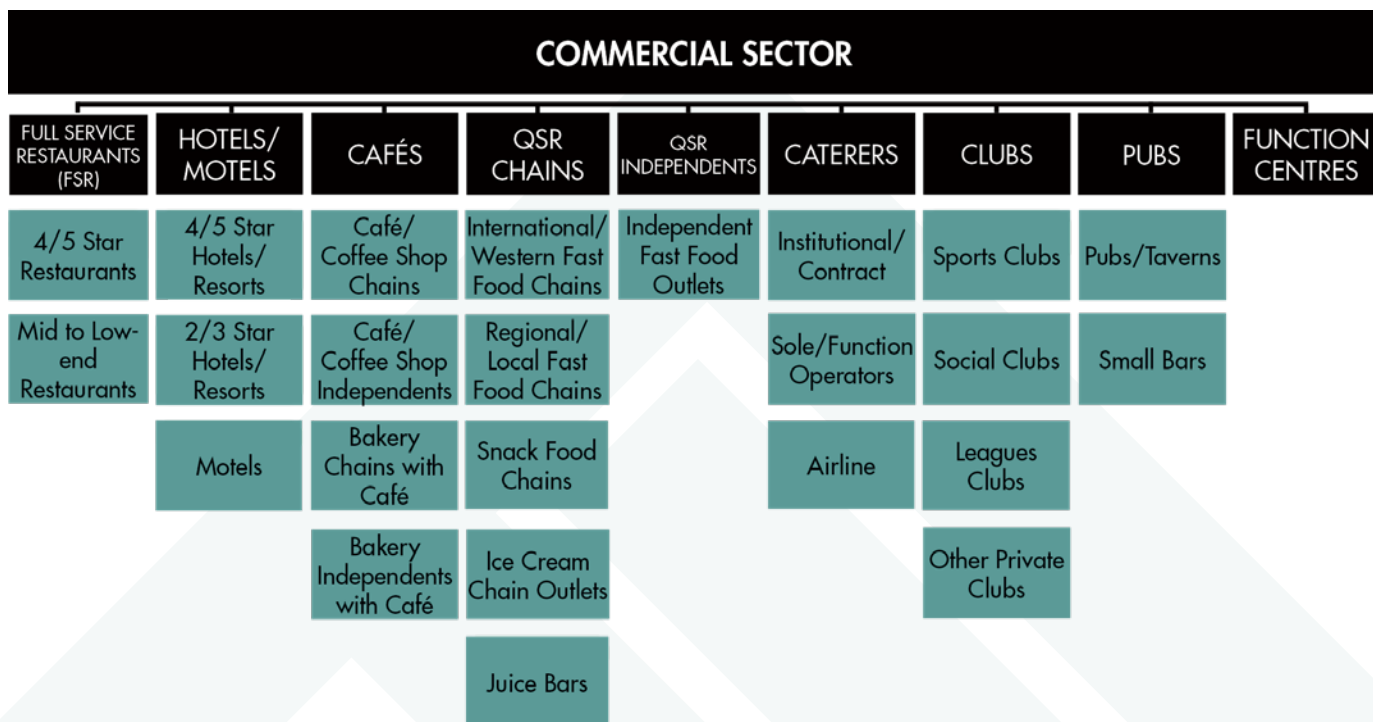
Analysis of independent
outlets versus outlets
within a chain by
foodservice channel for
the past five years

Fast food served by
Major QSR Chains

Fast food served by
Minor QSR Chains

Snack food served by
Snack Food Chains

AUSTRALIAN FOODSERVICE MARKET SEGMENTATION



FOODSERVICE MARKET INSIGHTS

I. THIRTEEN CHANNEL INSIGHTS REPORTS

The Channel Insights reports put focus on all the main Commercial and Institutional Channels, analysing **KEY CHANNEL:**

CHARACTERISTICS

STRUCTURE

MARKET SIZE DATA

MARKET DRIVERS

TRENDS & DEVELOPMENTS



The following channels are covered within the Commercial Foodservice Sector:



Full Service Restaurants (FSRs)



Cafés



Hotels



QSR Chains



QSR Independents



Pubs/Taverns



Clubs



Function Caterers

Within the Institutional Foodservice Sector:



Hospitals



Nursing Homes



Schools



Long Daycare Centres



Workplace Canteens



About 35% of Australian's Food and Non Alcoholic Beverage Budget is spent on eating out of home.



1. MEAT, POULTRY, FISH & SEAFOOD

Beef/Veal (fresh & frozen)
Lamb/Mutton (fresh & frozen)
Pork (fresh & frozen)
Other red meat such as goat or kangaroo
Poultry (fresh & frozen)
Fully cooked 'Heat & Serve' Poultry
Pre-prepared Poultry (e.g. schnitzel, chicken nuggets)
Bacon
Ham
Smallgoods (incl. salami, continental)
Fish (fresh)
Fish (frozen)
Seafood (fresh)
Seafood (frozen)
Frozen Prepared Fish & Seafood (incl. crumbed, battered)
Canned Tuna/Sardines & Other Fish/Seafood
Sausages & Frankfurts
Meat Patties for Hamburgers
Plant Based Meats



2. FRUIT & VEGETABLES

Fresh Fruit
Frozen Fruit
Fresh Vegetables
Frozen Vegetables excluding potatoes
Frozen Potatoes including chips, wedges etc
Canned Tomatoes
Canned Vegetables
Canned Fruit
Other Preserved Vegetables (incl. olives)



3. BREADS, FLOUR, PASTA, CEREALS & BISCUITS

Mainstream Bread/Rolls (fresh & frozen)
Flour
Pasta
Rice
Breakfast Cereal
Breadcrumbs/Coatings
Frozen Pastry/Dough (e.g. shortcrust, puff pastry)
Biscuits sweet
Biscuits savoury



4. CAKES, DESSERTS & TOPPINGS

Cakes (fresh – Single service/whole)
Shelf Stable Cakes - (Single serve/whole)
Frozen Cakes – (Single serve/whole)
Frozen Bake-Off Pastries Preproofed/Unproofed
Mixes for Cakes & Desserts
Croissants & Other Danish Pastries
Dessert Toppings
Jelly and Custards
Frozen/Chilled Desserts (Single serve/whole)



5. PREPARED MEALS, SNACKS & SOUPS

Frozen Pizza
Frozen Fully Prepared Meals (incl. poultry/meat/pasta based)
Canned Meals (incl. baked beans etc)
Meat Pies & Pasties (fresh & frozen)
Party Pies & Sausage Rolls (fresh & frozen)
Finger Food/Appetisers
Soups – Liquid (fresh & frozen)
Soups – Powder



6. SAUCES, CONDIMENTS, INGREDIENTS, SPICES, DRIED HERBS & DRESSINGS

Dressings (excl. mayonnaise)
Mayonnaise
Tomato Sauce/Ketchup
BBQ Sauce
White Sauce (incl. cheese, bechamel, hollandaise etc)
Other Traditional Sauces (incl. tartare, Worcestershire, cranberry etc)
Asian Sauces
Pasta Sauces (e.g. tomato)
Gravy
Stock, Bouillons & Boosters
Spices & Dried Herbs including Pepper
Salt
Mustard
Other Condiments (incl. horseradish, chutney, pickles, relish etc)
Sugar – White/Brown/Caster/Icing
Cooking Chocolate
Vinegar (all types)



7. FATS & OILS

Cottonseed/Grapeseed/Canola/Vegetable Oil
Olive Oil
Other Fats & Oils (incl. ghee, bakery fat, lard etc)
Specialty/Other Oils (e.g. hazelnut, sesame, other flavoured)
Margarine



8. SPREADS & JAMS

Jam/Marmalade
Honey
Savoury Spread (incl. Vegemite & peanut butter)
Chocolate & Hazelnut Spread



9. DAIRY PRODUCTS

Milk – Fresh Plain (full cream/low fat)
Milk – Fresh Flavoured
Milk – UHT (plain/flavoured)
Milk – Soy
Milk – Evaporated & Condensed
Cream (incl. thickened, sour etc.)
Ice Cream – Tub
Ice Cream – Non Tub
Cheese – Cheddar Block
Cheese – Other Hard Yellow Block
Cheese – Fresh (incl. cream, cottage, feta, mozzarella etc)
Cheese – Grated (incl. shaved, powder)
All Cheese Types
Cheese – Specialty (incl. blue mould, brie etc)
Butter
Butter Blends
Yoghurt
Eggs – Fresh
Eggs – Powdered
Eggs - Liquid and/or Pulp



10. BEVERAGES

Coffee – Instant
Coffee – liquid
Coffee – Roast & Ground/Esspresso (excl. pods)
Coffee – Portion Control (sachet/bag)
Coffee Pods - Roast & Ground
Tea Bags (incl. herbal)
Tea Leaves (incl. herbal)
Iced Tea
Iced Coffee
Iced Chocolate
Drinking Chocolate Ready To Drink - Powder, Granulated
Carbonated Soft Drinks
Water – Sparkling
Water – Still
Energy Drinks
Sport Drinks
Fresh Fruit Juice/Drink (chilled)
Long Life Fruit Juice/Drinks (ambient)



11. SNACKS & CONFECTIONERY

Chips – corn/potato based
Nuts
Chocolate Based Confectionery (incl. single, block, portion control etc)
Sugar Based Confectionery (incl. jellies, candies, portion control etc)





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