



AUSTRALIAN
**FOODSERVICE
ADVOCACY**
BODY

STATE OF THE **FOODSERVICE INDUSTRY** REPORT 2023

AFAB's State of the Foodservice Industry Report 2023 is the first definitive report of its kind, covering **Key industry trends by stakeholder groups, Food security, Food waste, Key foodservice industry facts, Dining out in Australia, Food distribution, Size of the Australian foodservice market 2017–2023 and The future.**

Why this report matters

The information contained in this report is crucial for businesses to plan the way ahead and also in highlighting the opportunities that abound in a post-COVID world.

1

Business pitching

The State of Play Report identifies key industry trends and facts revealed via the value food chain, consumer insights, market sizing, distribution with a firm focus on the future opportunities.

2

Key challenges

Know what the key challenges for our industry are and what it means for your business.

3

Confidence index

A reassuring indicator of the Australian Foodservice market by key commercial channels to identify business service opportunities.

4

Market outlook

Allocate your resources to where the market is growing in the next 12 months from the detailed forecast by channel.

Since the onset of the COVID-19 pandemic, Australia's foodservice industry has been forced to shift and adapt to accumulating challenges. Though the peak of the pandemic has passed, a hangover of supply chain issues, worker shortages and rising costs persist. These interconnected issues have impacted all stakeholders, with new obstacles creating both roadblocks and opportunities for business.

OVER **1.8 MILLION AUSTRALIANS** ARE EMPLOYED IN **FOOD RELATED INDUSTRIES** – MORE THAN IN ANY OTHER INDUSTRY



PRODUCER



MANUFACTURING



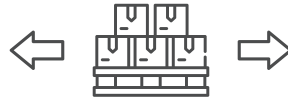
DISTRIBUTION



HOSPITALITY + RETAILING



AUSTRALIAN FOOD & BEVERAGE EXPORTS EXCEED IMPORTS BY AROUND **50%**



AUSTRALIA'S AGRICULTURAL EXPORTS SET TO HIT A RECORD

\$65B

IN VALUE IN 2023-24



AS OF JULY 2023, AUSTRALIA HAS

79,827 FOODSERVICE OUTLETS

AUSTRALIA HAS



57,400 + 22,400

COMMERCIAL INSTITUTIONAL FOODSERVICE OUTLETS

THE **TOP 3** MOST POPULAR CUISINES WHEN DINING OUT IN AUSTRALIA ARE



47%

24%

23%

MODERN AUSTRALIAN

CHINESE

ITALIAN

WOOLWORTHS HAS ACQUIRED PFD FOODSERVICES.



THE MOVE INCREASES WOOLWORTHS' 33% SHARE OF THE TOTAL FOOD AND GROCERY MARKET BY BETWEEN 1-3%.

TOTAL SIZE OF THE FOODSERVICE MARKET IN AUSTRALIA

\$18.9B AUD AT WHOLESALE LEVEL
\$57B AUD AT CONSUMER LEVEL

About **3.2%** of the Global Market



ON AVERAGE AN OUTLET SERVES **300 MEALS PER DAY**



22M MEALS SERVED PER DAY AND **8B** EVERY YEAR

THE AUSTRALIAN FOODSERVICE MARKET



UNIQUE



VIBRANT



DYNAMIC



DIVERSIFIED



EVOLVING

AUSTRALIANS HAVE MADE EATING OUT A WAY OF LIFE

78%

OF ALL AUSTRALIANS REGULARLY EAT OUT FOR BREAKFAST, BRUNCH, LUNCH, DINNER & SNACK MEALS



WE DRINK **35M CUPS OF COFFEE** P/A OUT OF HOME. CAPPUCCINO BEING THE MOST POPULAR, ALONG WITH **13M CUPS OF TEA**.

THE FOODSERVICE DOLLAR



In 1960, this figure was 12 cents



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Contact Tony Green
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www.ausfab.org