



**NEW ZEALAND
TRADE & ENTERPRISE**
Te Taurapa Tūhono

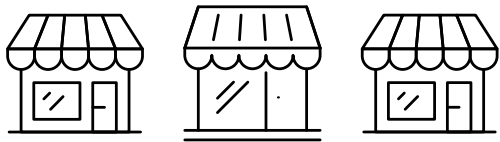
HORECA IN SOUTH KOREA

Market Landscape

SEEA MARKET RESEARCH | AUGUST 2025

Key Insights on South Korea's Foodservice Market: Growth, Cultural Drivers, and Opportunities for Exporters

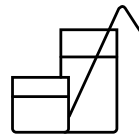
Chain Growth ≠ Homogenisation



While chained outlets are expanding and projected to surpass independents by 2027, the **revenue efficiency gap**, especially in full-service, suggests chains are not just scaling, but **refining their value proposition**. Chains are winning not by volume alone, but by **delivering consistent, high-margin experiences** in a market that prizes quality.

NZ Exporters should prioritise partnerships with chains that are innovating, not just expanding. Think premium QSRs, hybrid cafés, and experiential dining formats.

Café Culture is Korea's Soft Power



Coffee chains dominate the top 20 foodservice brands, with **6 out of 20** being coffee-led. Starbucks commands **5.2% market share** with just **1% of outlets** in chained foodservice, showing Korea's café scene is not just about volume, but about brand, experience, and lifestyle.

NZ beverage brands should view cafés as brand-building platforms, not just sales channels. Co-branding, seasonal menus, and wellness positioning could unlock premium visibility.

Formal Dining is a Cultural Anchor



Despite global trends toward casual formats, South Korea maintains Asia's **highest per capita spend on full-service dining**, which is nearly thrice of Singapore. This reflects a deep-rooted cultural preference for sit-down curated experiences, even as convenience format grows.

NZ premium ingredients such as meat, dairy, wine, are best positioned in full-service formats that emphasize provenance, storytelling and culinary craft.

Market Saturation is not Uniform



Outlet growth plateaus post-2024, signalling **maturity in growth centers**. However, Jeju and Busan offer differentiated growth paths: Jeju through tourism-driven density, Busan through seafood specialisation and port logistics.

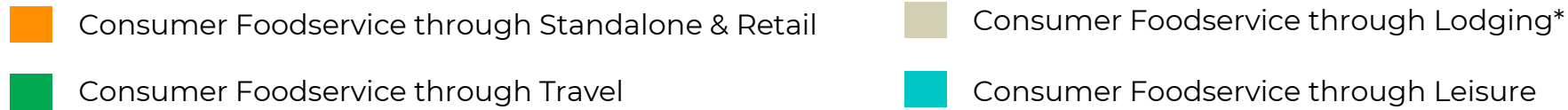
Regional strategies matter. Exporters should consider tiered market entry. Potential for premium launches in Seoul, Volume plays in Busan, and experiential activations in Jeju.



OVERVIEW OF FOODSERVICE

Consumer Foodservice Sales: Market resilience stems from robust standalone/retail channels, with lodging remaining a stable niche segment

Market Size Value by Location
Market size in USD billions



Pandemic Impact

- Market value fell from \$73.3B (2019) to \$64.5B (2021) due to COVID-19 disruptions across standalone, retail, and lodging channels.

Strong Recovery

- Sales rebounded to \$70.0B (2022), grew to \$76.2B (2023), and is projected to reach \$82.3B by 2029.

Channel Dominance

- Standalone (independent cafés/restaurants) and retail-linked outlets (mall food courts, supermarket counters) drive 90% of sales.

Lodging Stability

- Hotel-based foodservice (restaurants, room service) maintains a small but consistent market share.

Source: Euromonitor

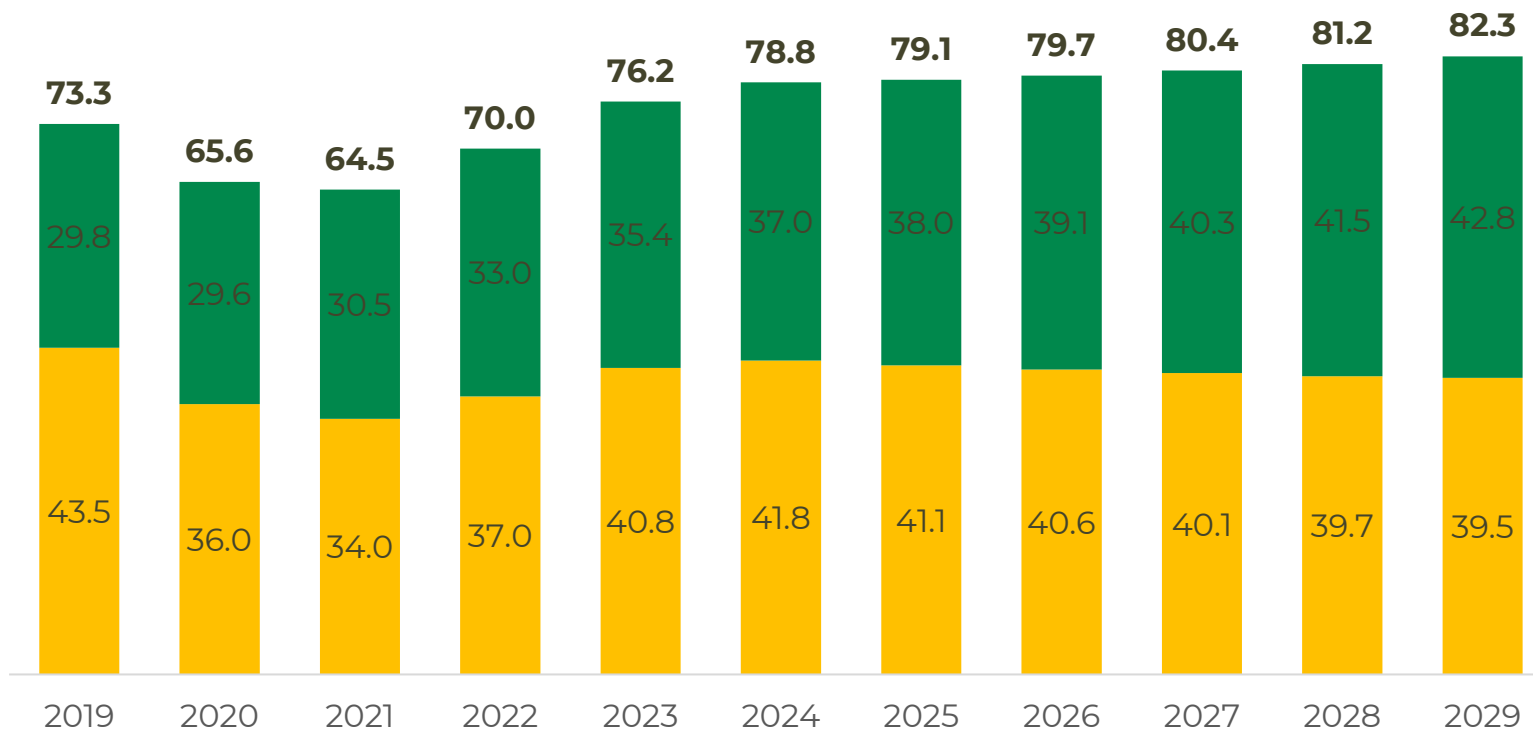
*Lodging: Foodservice operations located within hotels, motels, or other accommodation facilities. Examples: Hotel restaurants, room service, and hotel lobby cafés.

Consumer Foodservice Sales: Korean foodservice sector shows resilient post-COVID recovery while undergoing fundamental shift toward chain restaurant dominance

Chained vs Independent Foodservice Sales

Market size in USD billions

■ Independent Consumer Foodservice
 ■ Chained Consumer Foodservice



Strong Recovery

- Market rebounded to \$78.8B in 2024, exceeding pre-pandemic levels.

Market Shift

- Chained operators are projected to overtake independents by 2027.

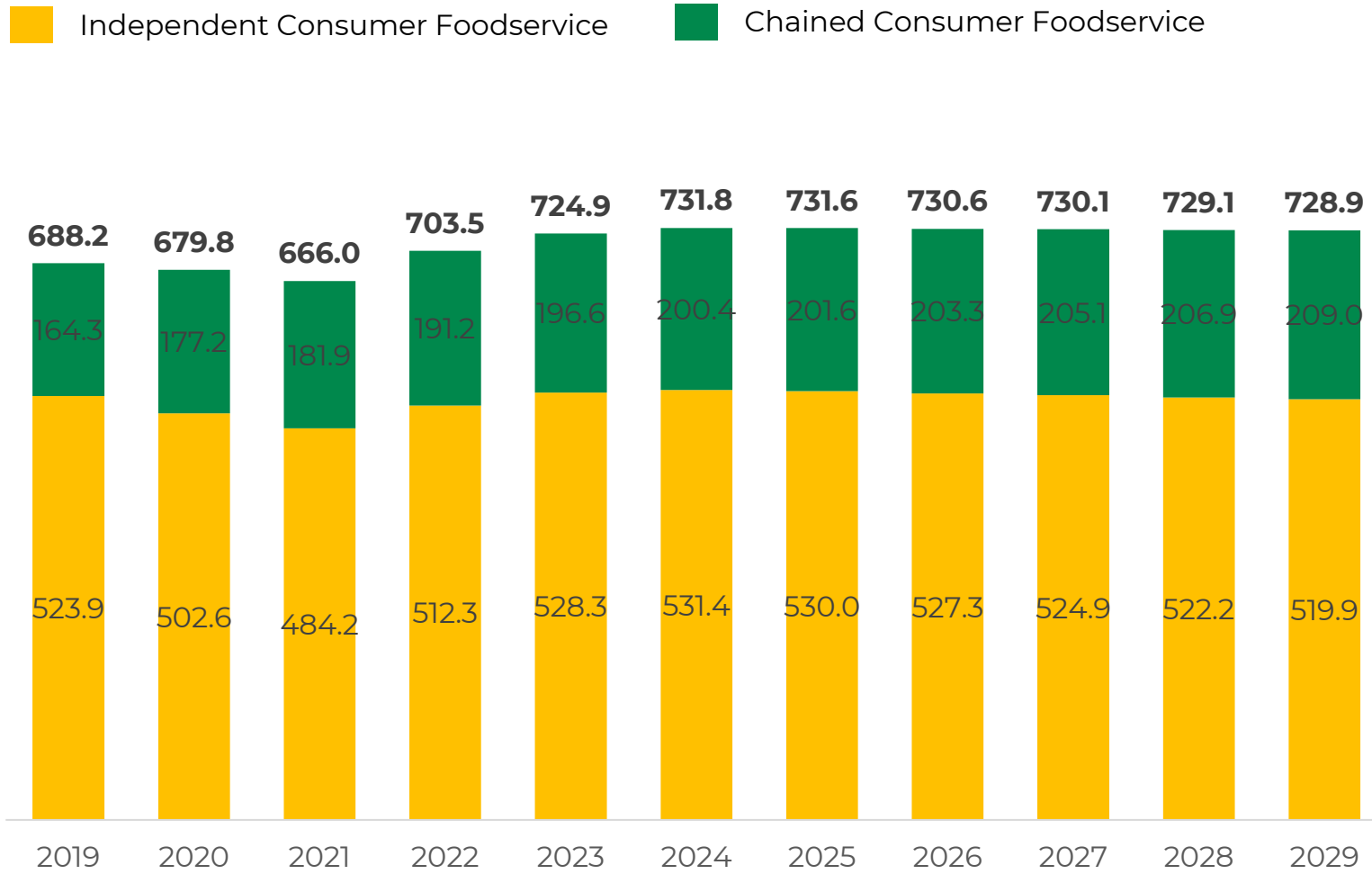
Growth Trajectory

- Total market expected to reach \$82.3B by 2029, with chains commanding 52% share

Consumer Foodservice Outlets: Korean foodservice is shifting structurally, with chains gaining ground on independents as the market nears saturation

Chained vs Independent Foodservice Outlets

Number of outlets in thousands



Chain Expansion Dominance

- Rapid expansion from 164.3k outlets (2019) to 209.0k (2029), reflecting a 27% surge over the decade.
- Chains projected to capture 29% market share by 2029, underscoring their competitive scaling and operational efficiency.

Market Maturation and Consolidation

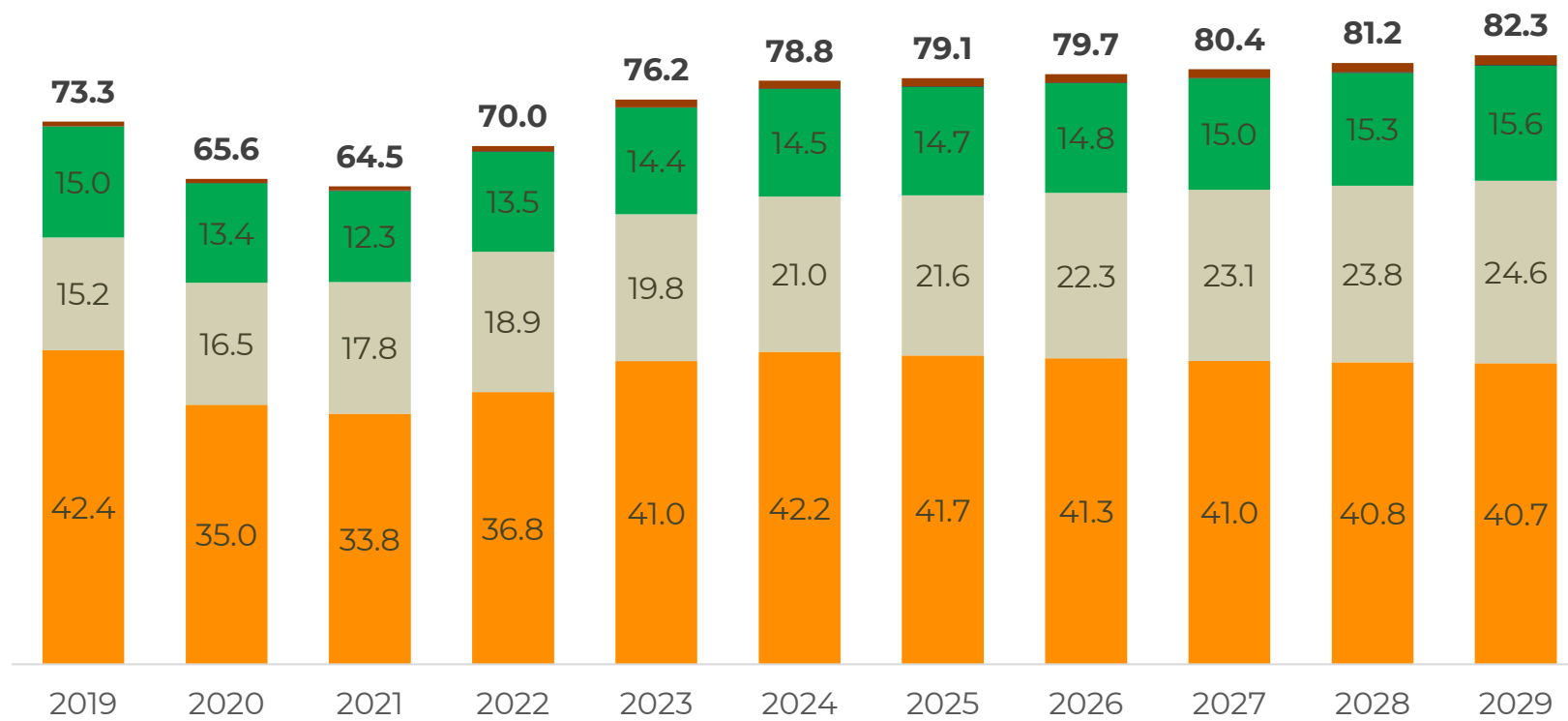
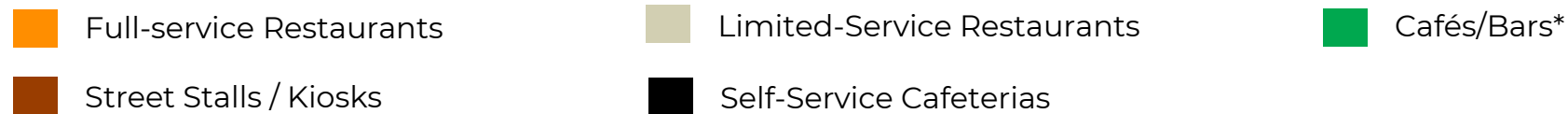
- Outlet growth plateaus post-2024, signalling market maturity and reduced expansion opportunities.
- Chains gain ground through operational scale, driving slight consolidation as independents face stiffer competition.



FOODSERVICE BREAKDOWN BY TYPE

Foodservice Sales by Type: Full-service restaurants lead the market but face challenges, while limited-service formats are set to drive future growth by aligning with consumer demand for convenience

Foodservice Sales by Type
Market size in USD billions



Full-Service Dominance

- Remains the largest segment at \$42.2B (2024), holding 53% market share despite a projected modest decline to \$40.7B by 2029.

Limited-Service Surge

- Demonstrates steady growth, rising from \$15.2B (2019) to a projected \$24.6B (2029), representing a 62% increase.

Café/Bars Revival

- A V-shaped recovery from a pandemic low of \$12.3B (2021) to \$14.5B (2024), projected to reach \$15.6B by 2029, returning to pre-COVID levels with modest growth.

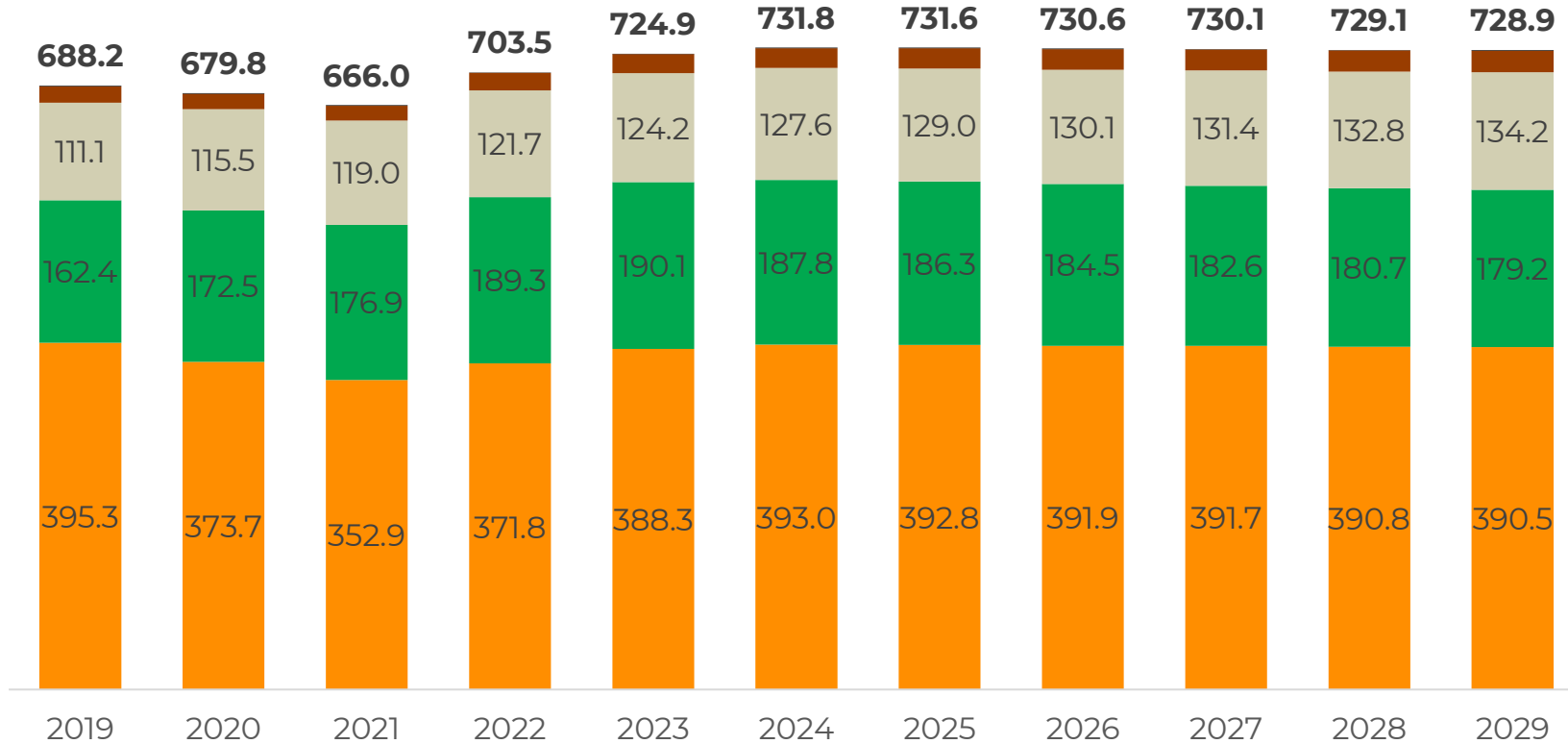
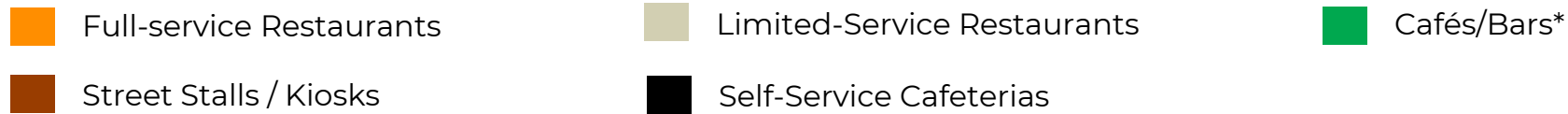
Market Shift

- Full-service retains leadership but faces structural challenges, while convenience-focused formats (limited-service, cafés) capture evolving consumer preferences, with limited-service emerging as the primary growth engine.

Foodservice Outlet by Type:

Korean foodservice sector shows outlet consolidation trends with full-service maintaining dominance while cafés/bars face gradual decline in outlet count despite revenue recovery

Foodservice Outlet Count by Type
Number of outlets in thousands



Full-Service Leadership

- Maintains the largest outlet count at 393.0k (2024), representing 54% of total outlets despite a slight decline from 395.3k in 2019.

Pandemic Resilience

- Total outlets dropped from 688.2k (2019) to 666.0k (2021), then rebounded to peak at 731.8k (2024) before stabilizing around 729k by 2029.

Limited-Service Stability

- Showed counter-cyclical growth during the pandemic, rising from 111.1k (2019) to 119.0k (2020-2021), then stabilizing around 134k outlets through 2029.

Sector Consolidation

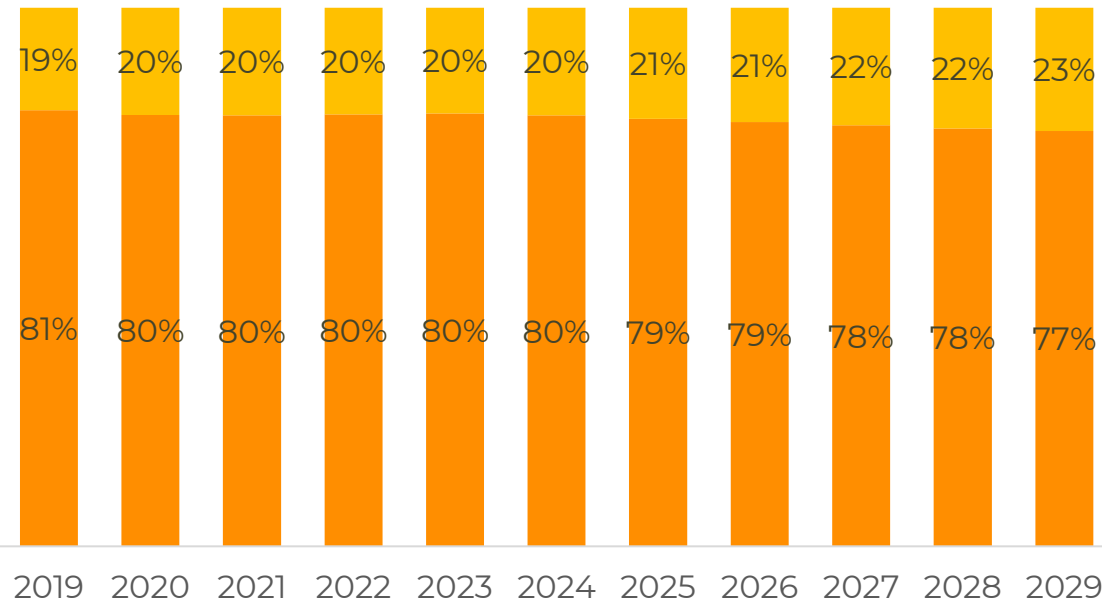
- The market exhibits outlet consolidation trends with full-service maintaining dominance, while cafés/bars face gradual decline in outlet counts despite revenue recovery.

Full-Service Restaurants Sales & Outlet Split: Independent full-service restaurants lead in numbers, but chains outperform in revenue per outlet, signalling a shift toward quality-driven expansion in a mature market.

Chain vs Independent Full-Service Restaurant Sales Breakdown

Market share value split by %

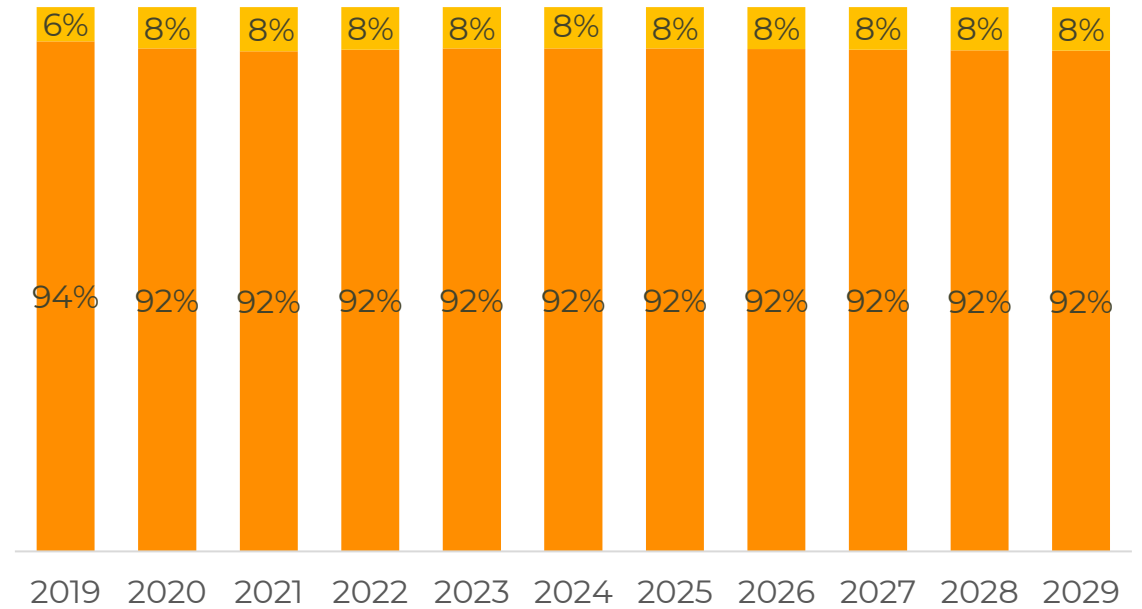
■ Independent ■ Chained



Chain vs Independent Full-Service Restaurant Outlets Breakdown

Number of outlets split by %

■ Independent ■ Chained



- **Independent Outlets Sales Leadership:**

Independents is projected to maintain 77.1% revenue share (2029) despite gradual decline from 81.0% (2019), while chains grow from 19.0% to 22.9%.

- **Outlet Concentration**

Independents overwhelmingly dominate with 92.4% of outlets (2024), chains holding only 7.6% despite modest growth from 6.3% (2019)

- **Gradual Market Shift**

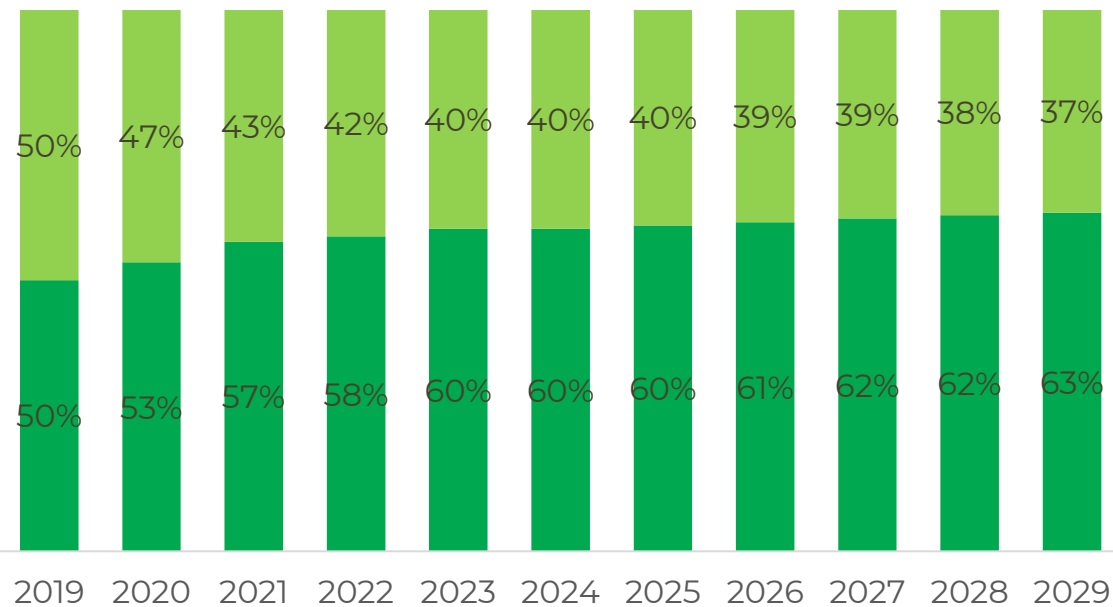
Steady but slow chain penetration projected in full-service segment, gaining 3.9% revenue share over decade while outlet share increases only 1.7%

Cafés/Bars Restaurants Sales & Outlet Split: Chained cafés show stable outlet numbers but declining revenue share, while independents see steady revenue growth with flat outlet counts.

Chain vs Independent Cafés/Bars Breakdown

Market share value split by %

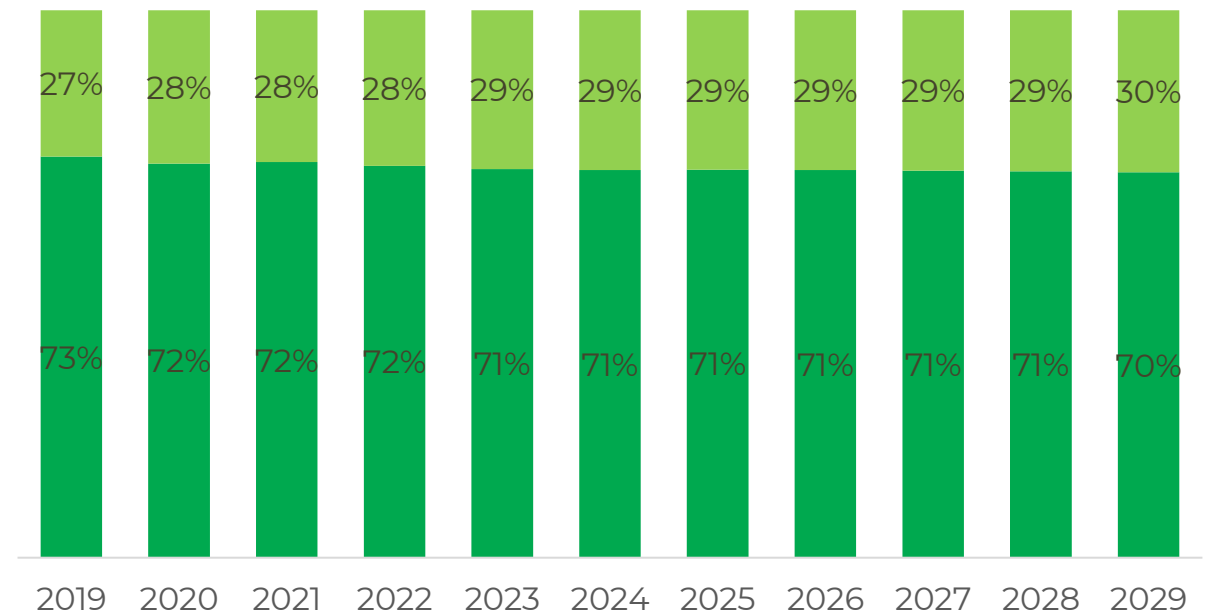
■ Independent
 ■ Chained



Chain vs Independent Cafés/Bars Breakdown

Number of outlets split by %

■ Independent
 ■ Chained



- **Independent Revenue Leadership**

Independents command 60% revenue share (2024), growing to 63% by 2029; reversing the 50-50 split from pre-pandemic 2019.

- **Independent Outlet Concentration**

Independents hold 71% of outlets (2024), declining slightly to 70% by 2029 (down from 73% in 2019), maintaining majority market share.

- **Chain Efficiency Dynamics**

Chained outlets are expected to generate 40% of revenue from just 30% of outlets by 2029, showing diminishing revenue efficiency.



TOP CHAINED CONSUMER FOODSERVICE BRANDS

Top 20 Chained Consumer Foodservice Brands: Coffee Culture and Korean Brands Lead Market

Top 20 Global Brand Name Shares in Chained Consumer Foodservice Breakdown of Foodservice market share value in % & no. of outlets (2024)

No.	Global Brand Name	Global Brand Owner	Foodservice by Type	Market Share by Value (%)	No. of Outlets
1	Starbucks	Starbucks Corp	Café/Bars	5.2	1,937
2	Paris Baguette	SPC Group	Café/Bars	5.1	3,463
3	McDonald's	McDonald's Corp	Limited-Service Restaurants	2.9	398
4	Lotteria	Lotte Group	Limited-Service Restaurants	2.5	1,340
5	BHC	BHC Co Ltd	Limited-Service Restaurants	2.5	2,300
6	BBQ	Genesis Co Ltd	Limited-Service Restaurants	2.3	2,338
7	Mega MGC Coffee	Ann House Co Ltd	Café/Bars	2.2	3,038
8	CU	BGF Retail Co Ltd	Limited-Service Restaurants	2.1	18,770
9	Baskin-Robbins	Inspire Brands Inc	Limited-Service Restaurants	1.9	1,753
10	GS25	GS Holdings Corp	Limited-Service Restaurants	1.9	18,322
11	Kyochon Chicken	K&G System Co Ltd	Limited-Service Restaurants	1.9	1,386
12	A Twosome Place	CJ Foodville Corp	Café/Bars	1.7	1,640
13	Tous Les Jours	CJ Foodville Corp	Café/Bars	1.5	1,328
14	Mom's Touch	Mom's Touch & Co	Limited-Service Restaurants	1.5	1,471
15	Compose Coffee	JM Coffee Co Ltd	Cafes/Bars	1.4	2,612
16	7-Eleven	Seven & I Holdings Co Ltd	Limited-Service Restaurants	1.3	13,350
17	Goopne Chicken	GN Food Co Ltd	Limited-Service Restaurants	1.1	1,145
18	Burger King	Restaurant Brands International Inc	Limited-Service Restaurants	1.1	492
19	Myeong Ryun Jinsa Galbi	Myeong Ryun Dang Co Ltd	Full-Service Restaurants	1.1	615
20	Ediya Espresso	Ediya Co Ltd	Café/Bars	1	2,917

Total Chained Outlets in South Korea 200,357

Korean Brand Strength

Café/bars and limited-service restaurants dominate the top 20 chains, with Korean companies taking 13 of these spots and coffee concepts holding 6, reflecting Korea's vibrant café culture and preference for domestic brands.

Top 20 Chained Full-Service Brands: Korean BBQ and Casual Dining Lead Fragmented Market

Top 20 Global Brand Name Shares in Chained Full-Service Restaurants

Breakdown of Full-Service Restaurants market share value in % & no. of outlets (2024)

No.	Global Brand Name	Global Brand Owner	Market Share by Value (%)	No. of Outlets
1	Myeong Ryun Jinsa Galbi	Myeong Ryun Dang Co Ltd	4.7	615
2	Outback Steakhouse	Bloomin' Brands Inc	4.3	94
3	Ashley	E-Land Group	3.6	100
4	Bon Juk & Bibimbap	Bonif Co Ltd	3.5	1089
5	QooQoo	QooQoo Franchise Group	3.2	90
6	Hong Kong Banjeom 0410	Born Korea Co Ltd, The	1.7	298
7	Gimgane Gimbap	Daehakro Gimgane Co Ltd	1.5	400
8	Bon Juk	Bonif Co Ltd	1.4	594
9	Won Halmoni Bossam	Won & Won Co Ltd	1.3	295
10	Hanam Pig	Hanam F&B Co Ltd	1	169
11	VIPs	CJ Foodville Corp	1	29
12	Mad For Garlic	Sun at Food Co Ltd	0.8	41
13	Yeokjeon Udon 0410	Born Korea Co Ltd, The	0.7	216
14	Rolling Pasta	Born Korea Co Ltd, The	0.7	129
15	Chaesundang	Chaesundang Co Ltd	0.7	139
16	Nolboo	Nolboo Co Ltd	0.5	396
17	Bongchu Jjimdak	Bongchu Food System Co Ltd	0.4	128
18	Saemaul Sikdang	Born Korea Co Ltd, The	0.4	91
19	Sinpo Our Dumpling	Sinpo Inc	0.4	112
20	Mr Pizza	MPK Group Inc	0.3	158

Premium Positioning of International Brands

Consumers show strong preference for traditional Korean cuisine, with domestic brands holding 18 of the top 20 positions, while international brands like Outback achieve high revenue efficiency through premium positioning despite fewer outlets.

Total Chained Full-Service Restaurants in South Korea

393,035

Top 20 Chained Café/Bars: Starbucks Demonstrates Premium Segmentation in Market

Top 20 Global Brand Name Shares in Cafés/Bars

Breakdown of Cafés/Bars market share value in % & no. of outlets (2024)

No.	Global Brand Name	Global Brand Owner	Café/Bars Subcategory	Market Share by Value (%)	No. of Outlets
1	Starbucks	Starbucks Corp	Specialist Coffee/Tea Shop	22.1	1,937
2	Mega MGC Coffee	Ann House Co Ltd	Specialist Coffee/Tea Shop	9.4	3,038
3	A Twosome Place	CJ Foodville Corp	Café	7.2	1,640
4	Compose Coffee	JM Coffee Co Ltd	Specialist Coffee/Tea Shop	5.9	2,612
5	Ediya Espresso	Ediya Co Ltd	Café	4.5	2,917
6	Paik's Coffee	Born Korea Co Ltd, The	Specialist Coffee/Tea Shop	4.3	1,594
7	Yeokjeon1982	Yeokjeon FnC Co Ltd	Bar	3.3	910
8	The Venti	SNC Sein Co Ltd	Café	2.7	1,360
9	Dunkin'	Inspire Brands Inc	Café	2.1	681
10	Tudari	Ewon Co Ltd	Bar	1.8	1,350
11	Paul Bassett	Maeil Dairies Co Ltd	Café	1.6	143
12	Crown Hof	PSP F&D Co Ltd	Bar	1.4	474
13	Hollys	Hollys F&B Co Ltd	Specialist Coffee/Tea Shop	1.3	487
14	Pascucci	Pascucci Torrefazione SpA	Café	1.2	486
15	Goldstar Beer	Goldstar Beer Co Ltd	Bar	1.2	212
16	Fun Beerking	Fun & I Co Ltd	Bar	1.1	339
17	Inssaeng Beer	Wevelopment Co Ltd	Bar	1.1	248
18	The Coffee Bean & Tea Leaf	Jollibee Foods Corp	Specialist Coffee/Tea Shop	1	220
19	Tom N Toms	Tom N Toms Co Ltd	Specialist Coffee/Tea Shop	0.8	249
20	Angel-in-us Coffee	Lotte Group	Specialist Coffee/Tea Shop	0.8	353

Total Cafés/Bars in South Korea 187,778

Premium Café Segmentation and Local Brand Strength

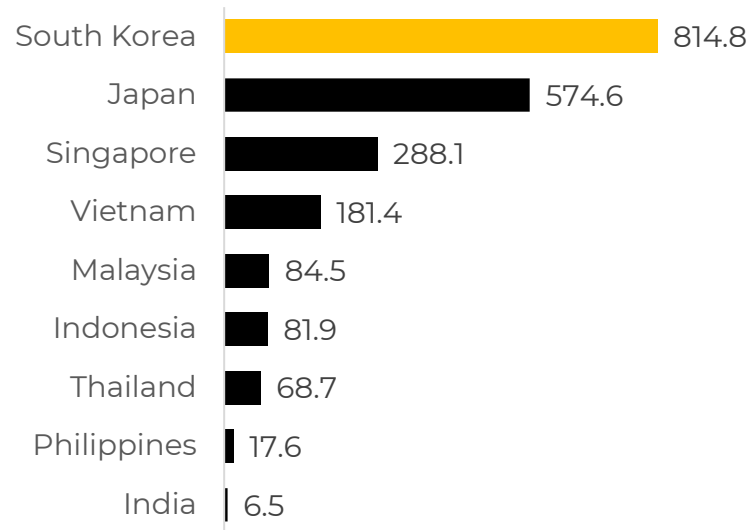
The Korean café/bar market shows clear premium segmentation with Starbucks achieving exceptional revenue efficiency, while domestic coffee chains like Mega MGC and A Twosome Place successfully compete through strategic positioning and local market knowledge.



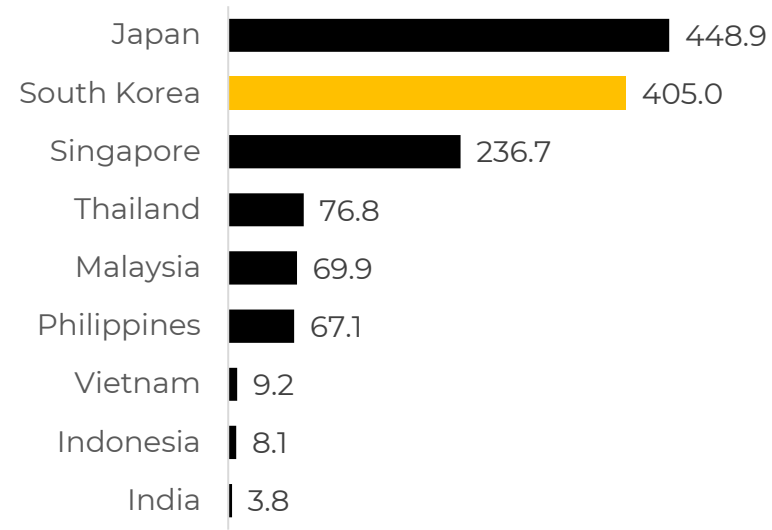
CONSUMER SPENDING AND CUISINE CATEGORIES

Consumer Per Capita Spend: South Korea leads Asia in foodservice spending intensity, driven by affluent consumer behaviour and a robust dining culture across Full-Service, Limited-Service, and Café Segments

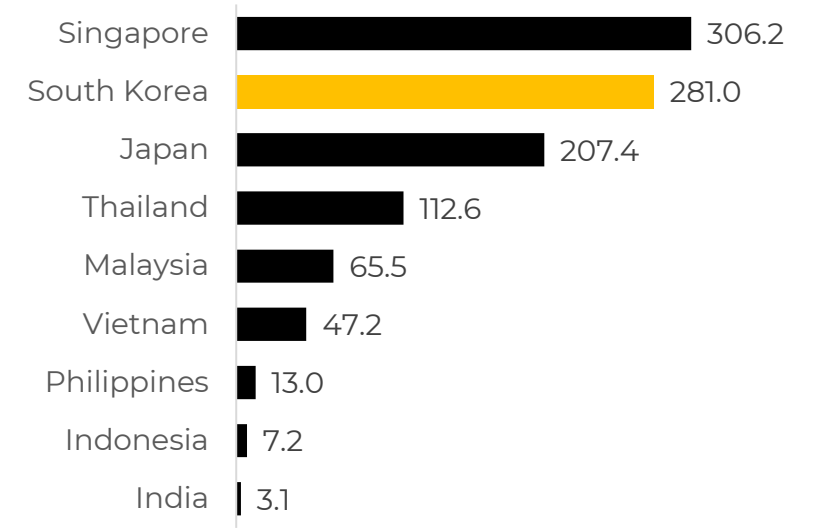
Full-Service Restaurants per capita spend
Per annum in USD



Limited-Service Restaurants per capita spend
Per annum in USD



Cafés/Bars per capita spend
Per annum in USD



- **Full-Service Leadership**

South Korea dominates with \$814.8 per capita spend, 42% higher than Japan (\$574.6) and nearly three times of Singapore's per capita spend.

- **High Limited-Service & Café/Bar spend per capita**

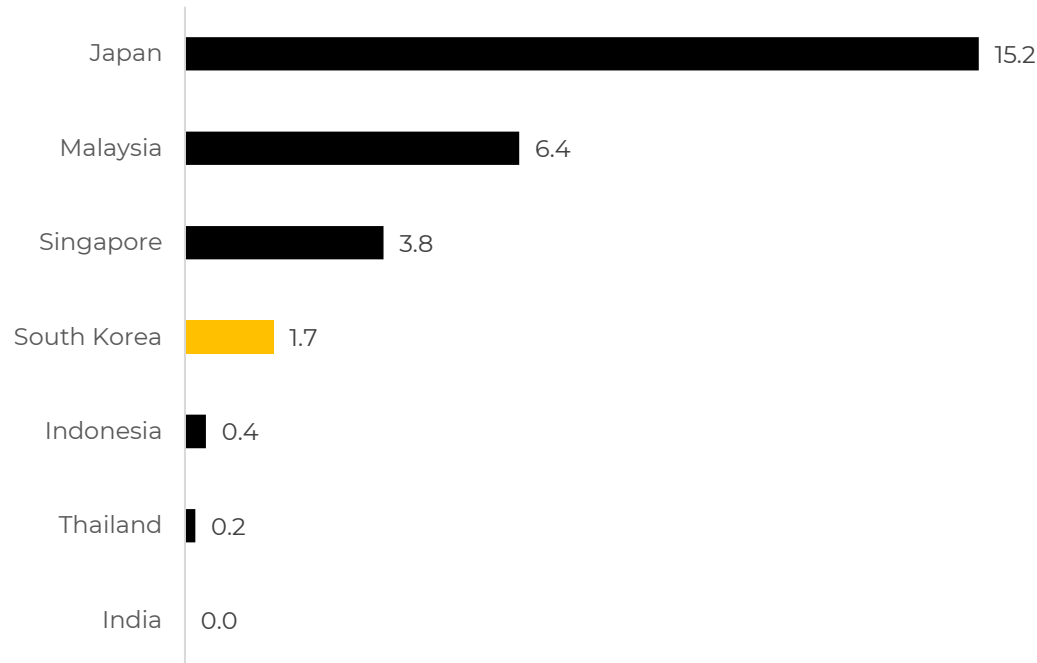
South Korea ranks second place in limited service and cafés/bars per capita spend, behind Japan and Singapore respectively.

- **Premium Market Position**

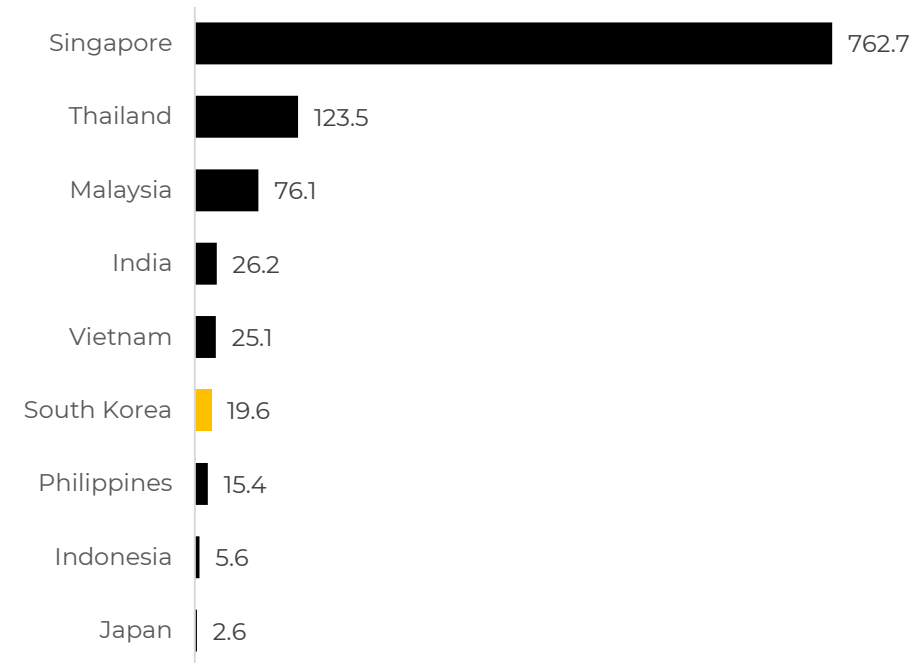
Total per capita foodservice spend of ~\$1,500 across three segments place South Korea as Asia's highest spending market.

Consumer Per Capita Spend: South Korea's Foodservice Strength Lies in Formal Dining, Not Casual Formats

Self-Service Cafeteria per capita spend*
Per annum in USD



Street Stalls/ Kiosk Restaurants per capita spend
Per annum in USD



- **Self-Service Cafeteria Gap**

South Korea ranks 4th in per capita spend at just \$1.70, significantly trailing Japan and below the regional average of \$4.0.

- **Consumer Habit Contrast**

Despite leading in t format dining segments, South Korea shows low engagement in informal food channels compared to regional peers.

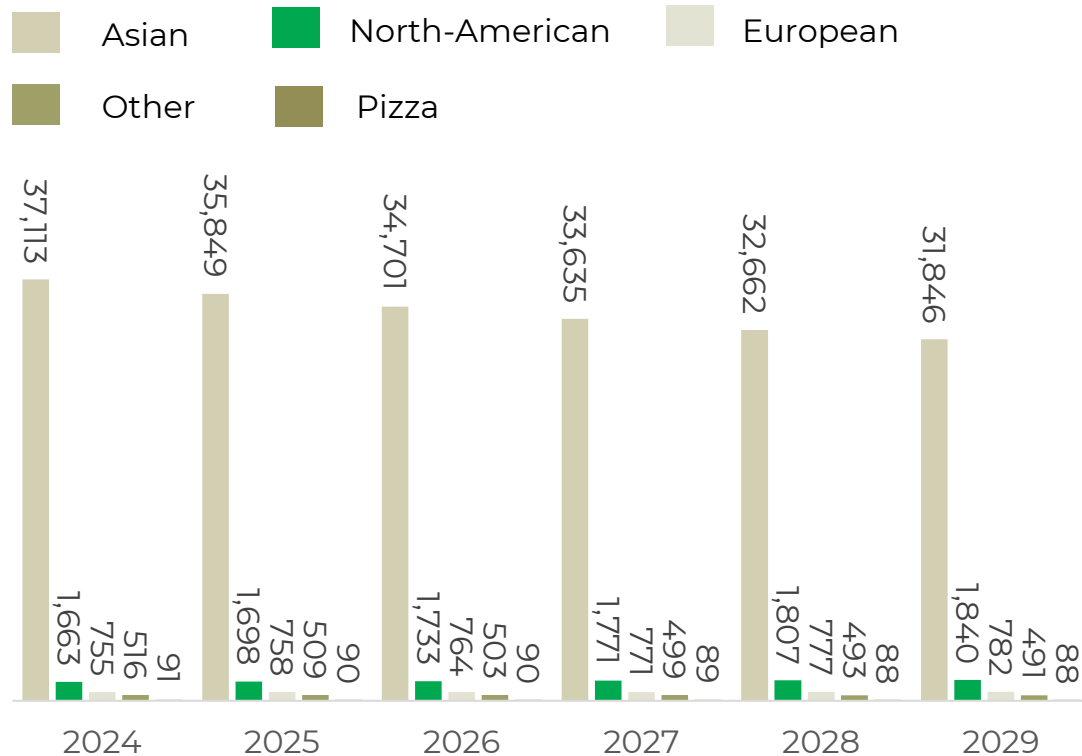
- **Cultural Habit**

South Korea's foodservice strength lies in formal dining establishments rather than street food or self-service formats, showing distinct cultural preferences that favour sit-down restaurants over casual food channels which are more prevalent in other Asian markets.

Full-Service Cuisines: Asian cuisine continues to dominate, but demand for North American concepts is steadily rising from a small base

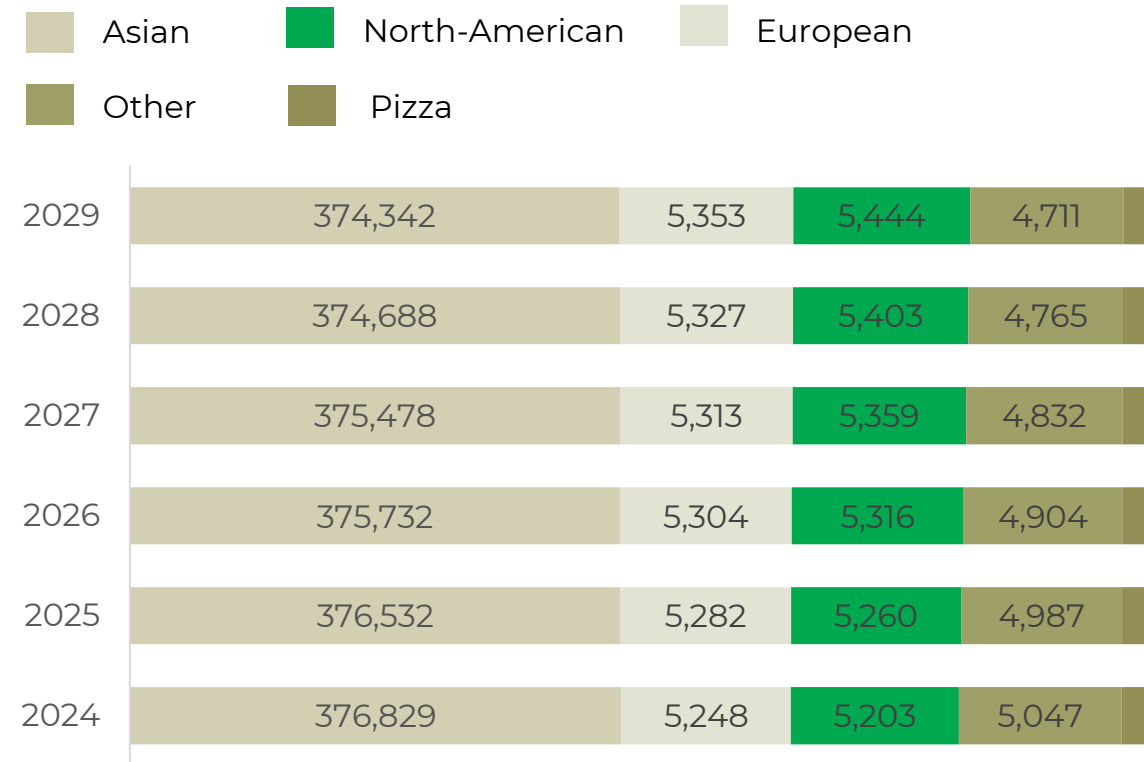
Full-Service Restaurants Foodservice Value by Cuisine Category

Value in USD millions (2024 – 2029)



Full-Service Restaurants Units/Outlets by Cuisine Category

Number of Units/Outlets (2024 – 2029)



- **Asian Cuisine Dominance**

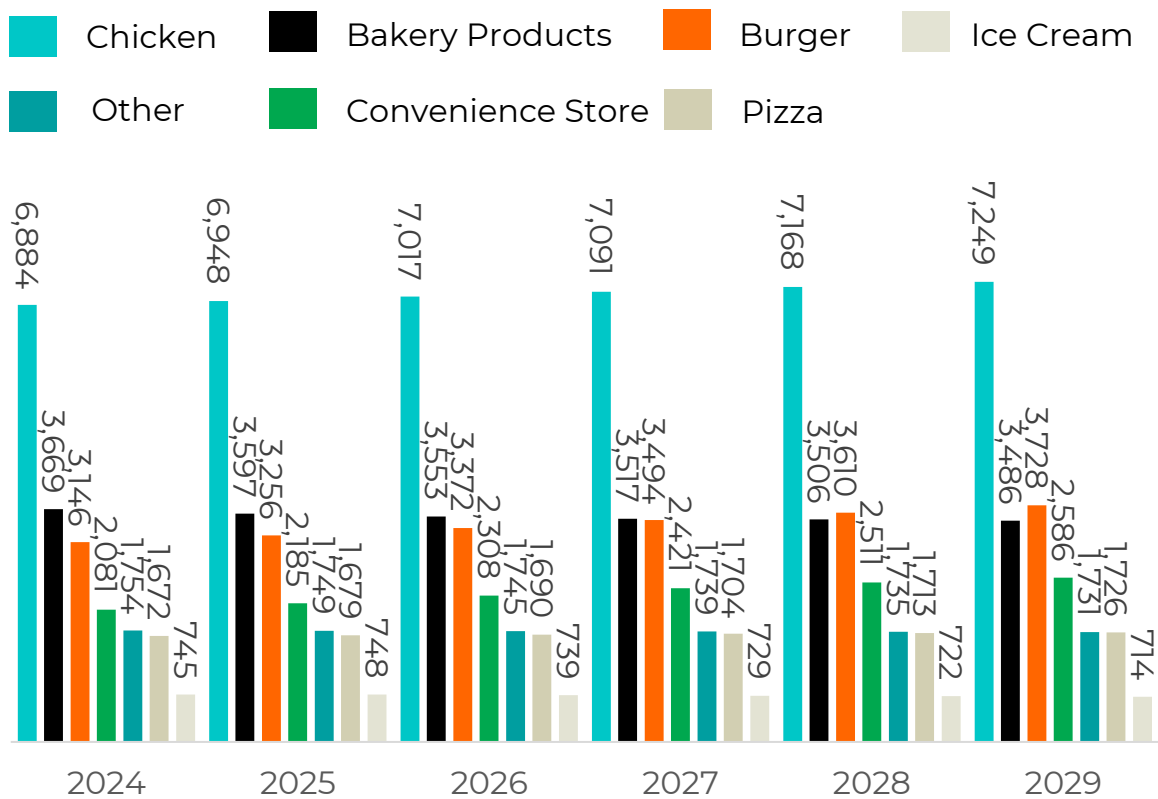
Accounts for 95% of full-service outlets and maintains most of the \$37.1 billion market revenue in 2024.

- **North American Cuisine Growth**

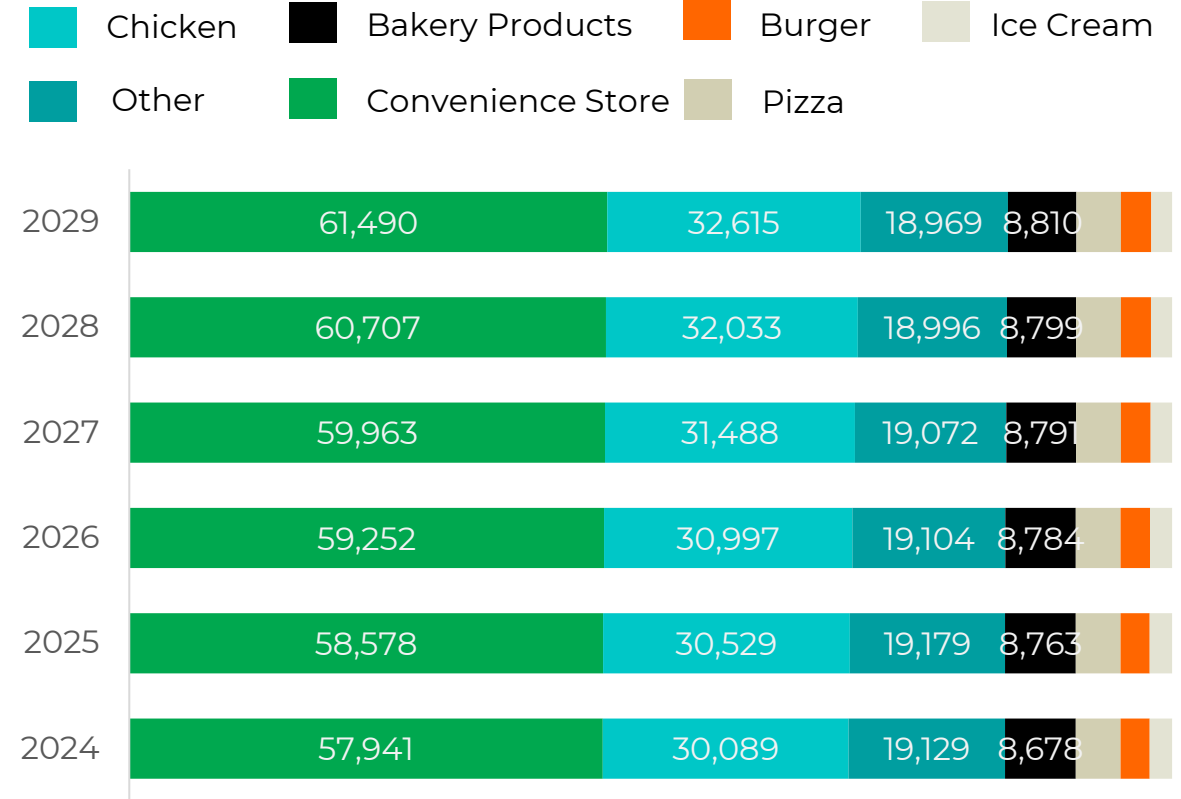
Exhibits the strongest growth, expanding from 5,203 outlets in 2024 to 5,444 outlets in 2029. A steady growth revenue is also expected through to 2029.

Limited-Service Cuisines: Chicken dominates limited-service, with bakery as a staple and burgers emerging as a high-growth category

Limited-Service Restaurants Foodservice Value by Cuisine Category
Value in USD millions (2024 – 2029)



Limited-Service Restaurants Units/Outlets by Cuisine Category
Number of Units/Outlets (2024 – 2029)



- Burger Category Surge**

Burgers are projected to overtake bakery products by 2028, becoming the next most valuable cuisine by 2029..

- High Value-to-Outlet Ratio**

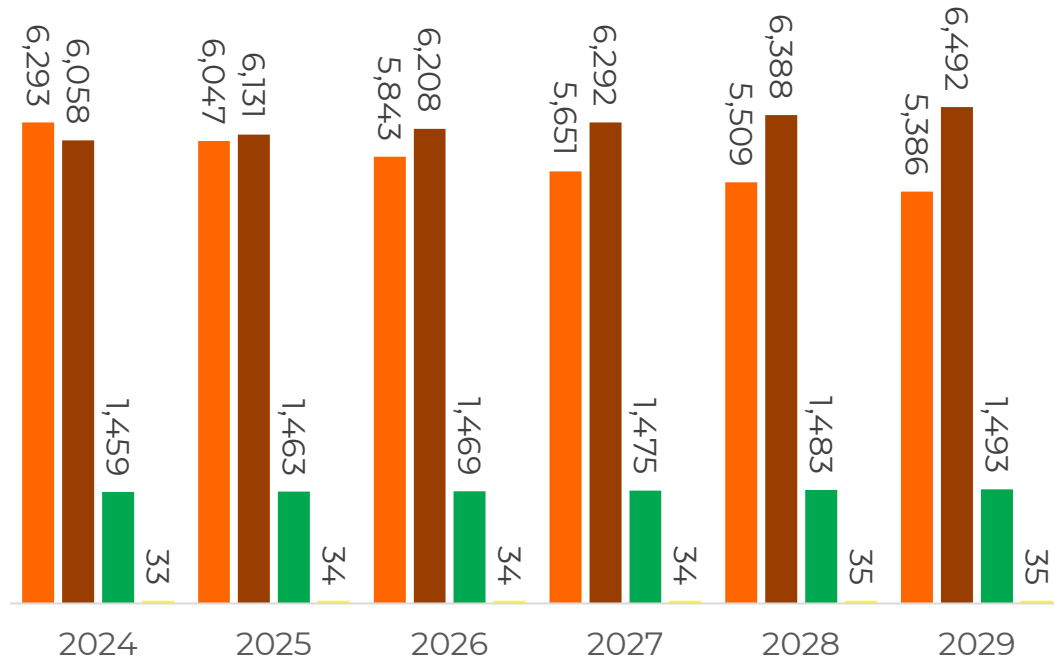
Bakery products, chicken, and burgers exhibit the highest value per outlet in the segment.

Cafés/Bars:

Specialist Coffee and Tea Shops lead revenue despite fewer outlets, showing premium market segmentation

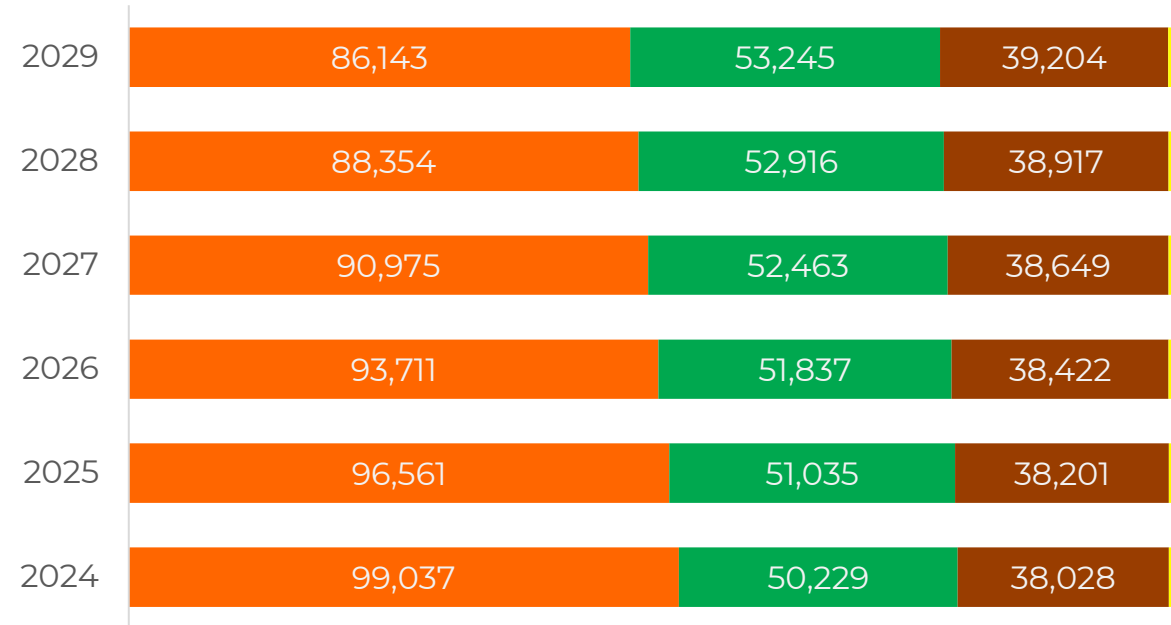
Cafés/Bar Foodservice Value by Cuisine Category

Value in USD millions (2024 – 2029)



Cafés/Bars Units/Outlets by Cuisine Category

Number of Units/Outlets (2024 – 2029)

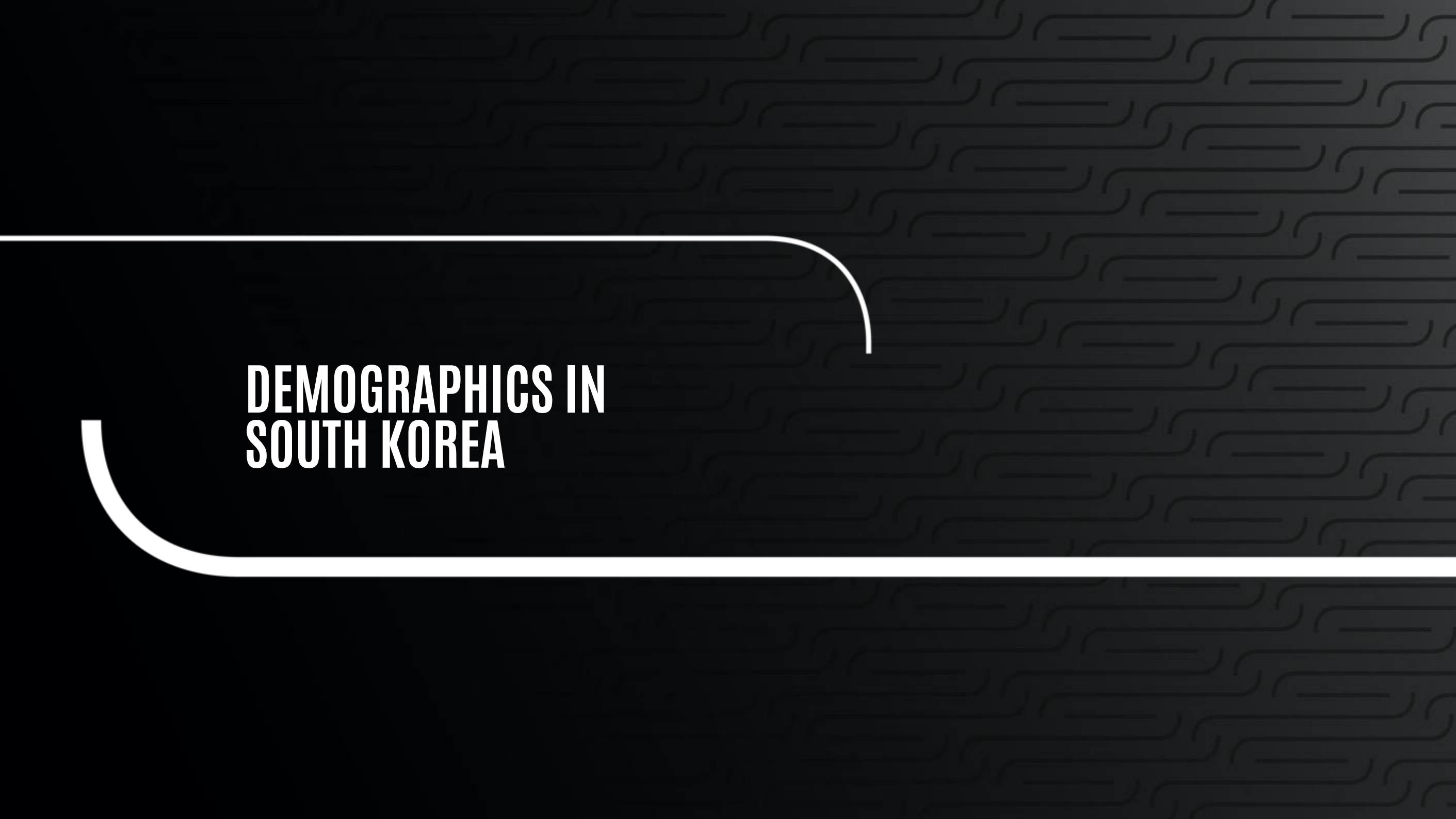


- **Declining Bars and Pubs Revenue and Outlet Count**

Bars and pubs have the highest outlet count, but this will decline by 14% by 2029. Similarly, revenues are expected to fall 16% by 2029 for bars and pubs.

- **Slow and Steady Growth Projected for Café Segment**

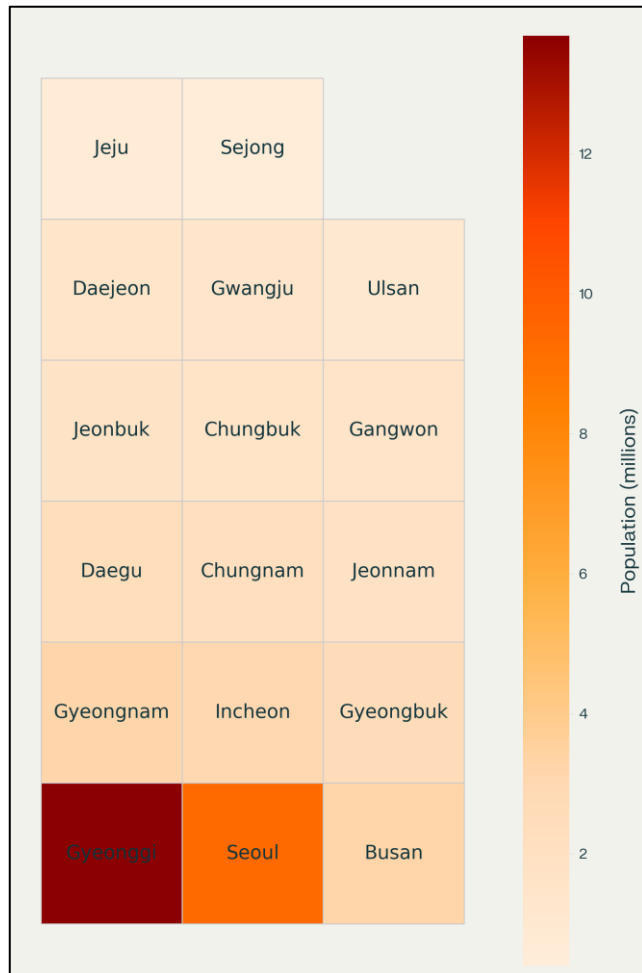
Cafés show balanced growth, with outlets increasing from 50,229 in 2024 to a projected 53,245 in 2029. Stable revenue is expected hover around \$1.5 billion.



DEMOGRAPHICS IN SOUTH KOREA

South Korea Population Demographics: Greater Seoul holds half the population, Busan remains a secondary hub, and Jeju stands out for high foodservice density driven by tourism.

Population in South Korea 2024
By province in million inhabitants



Greater Seoul Metropolitan Area (Population: 26.0 million)

- Seoul, Incheon and parts of Gyeonggi-do forms the most populous and metropolitan region in South Korea.



Busan (Population: 3.3 million)

- Busan is the third most populous city in South Korea. It is a major urban centre due to its port, industrial base, and cultural significance.

Jeju (Population: 0.7 million)

- Jeju drew 1.9M foreign tourists in 2024 (68% Chinese tourists) and leads Korea in foodservice density—233.5 eateries per 10K people, double the national average

South Korea Population Demographics:

Greater Seoul leads foodservice innovation with high returns, while Busan and Jeju offer sustainable, differentiated growth, making South Korea a dynamic multi-market opportunity.

01

Greater Seoul Metropolitan Area

Demographics:

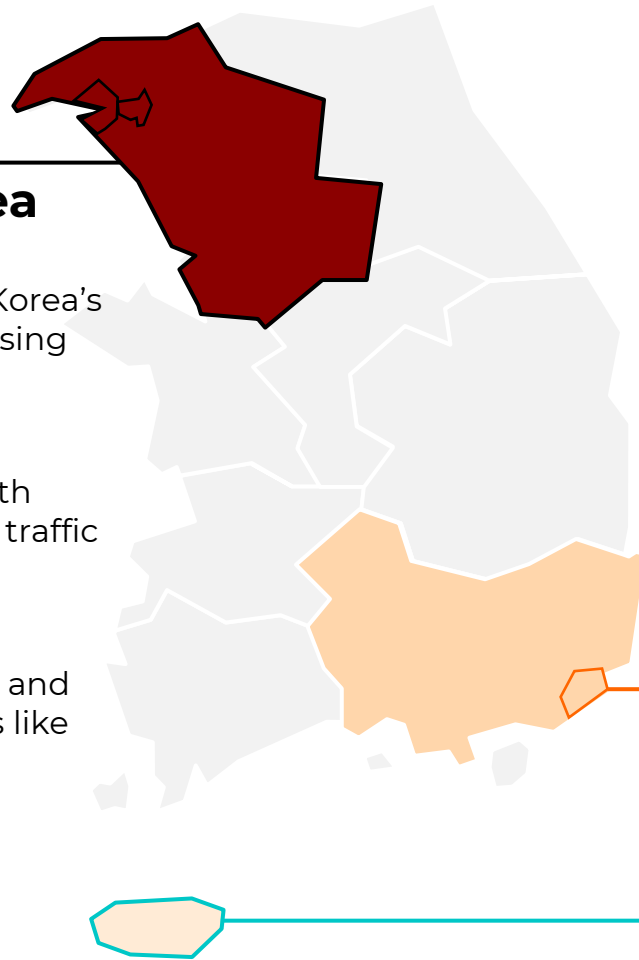
Home to 26 million people, about half of South Korea's population, with high urban density and purchasing power.

Tourism & Mobility:

A top domestic and international destination with extensive public transport, supporting high foot traffic and convenience dining.

Foodservice Market Density & Trends:

Strong Demand for premium, health-conscious, and global cuisine, dense restaurant clusters in cities like Suwon, Seongnam and Goyang.



02

Busan

Demographics:

South Korea's second-largest city with a population of 3.3 million.

Tourism & Mobility:

A major port and cultural hub, Busan attracts millions annually for beaches, festivals and MICE events.

Foodservice Market Density & Trends:

High concentration of seafood and traditional Korea cuisine, with growing interest in fusion and international offerings.

03

Jeju Island

Demographics:

Population of 0.7m, with a high ratio of tourists to residents.

Tourism & Mobility:

South Korea's top leisure destination, with 1.9 million foreign tourists in 2024, and 13.7 million total visitors.

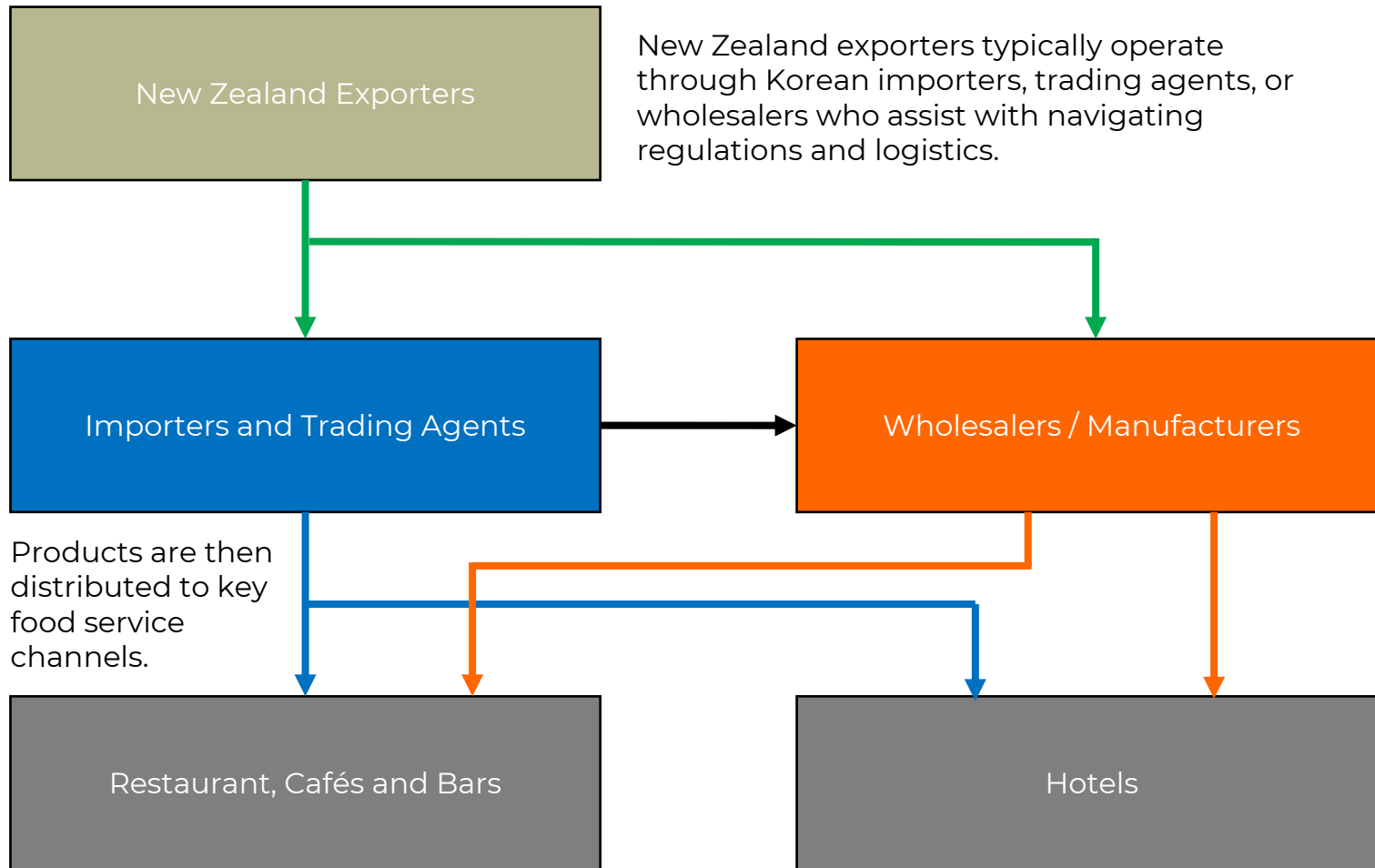
Foodservice Market Density & Trends:

Highest in South Korea at 233.5 restaurants per 10,000 residents, double the national average, driven by tourism



FOODSERVICE DISTRIBUTION PATHWAYS

Distribution Pathways for New Zealand Premium Exports in Korea's Consumer Foodservice Sector (B2C)



New Zealand exporters typically operate through Korean importers, trading agents, or wholesalers who assist with navigating regulations and logistics.

Products are then distributed to key food service channels.

Restaurants, cafés, and bars, a diverse and growing segment that ranges from fine dining to specialist coffee and tea shops.

Hotels which prioritise premium ingredients for upscale guests.

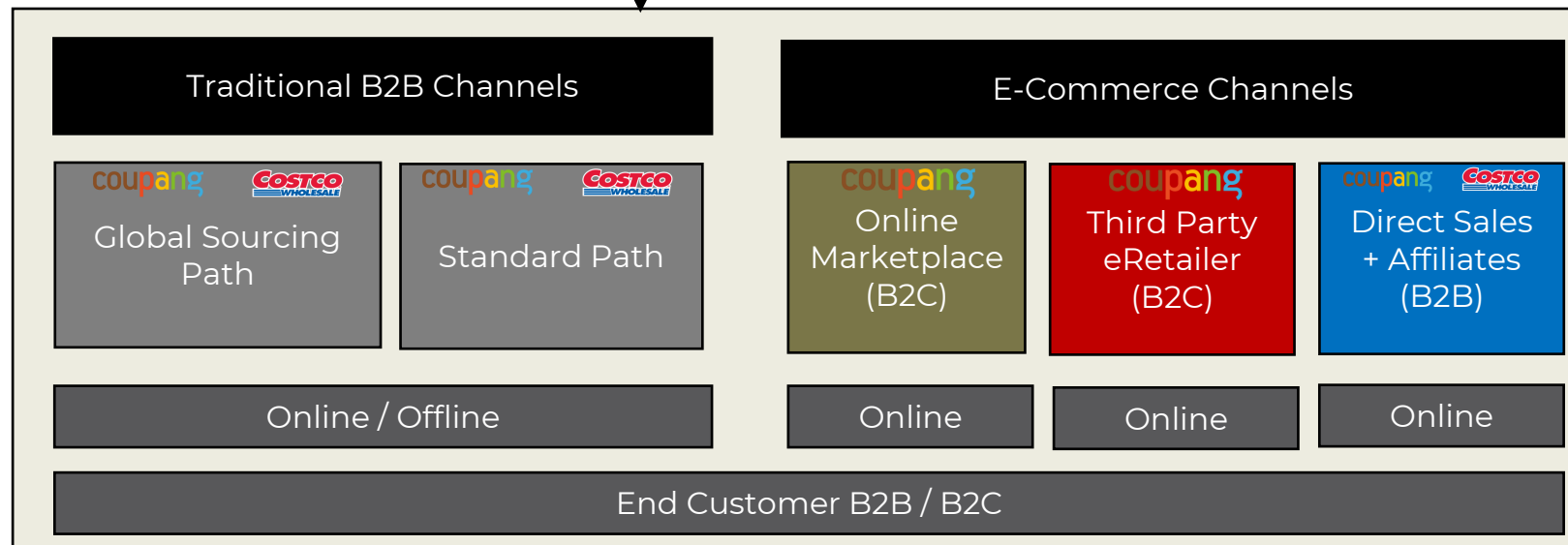
This distribution model highlights the importance of strong local partnerships and market knowledge.
It also reflects rising demand, especially in urban areas for premium, high-quality products that emphasize origin, quality, and innovation.

B2B and B2C Distribution Networks for New Zealand Premium Food Exports to Korea

New Zealand Exporters



Wholesale Retailer Channels

Leading Korean Wholesalers and retailers such as Coupang and Costco act as primary entry points for NZ products.

These channels have extensive nationwide networks, enabling large-scale imports and broad product placement.

Global Sourcing Path:
Channels act as importers, working directly with brands to bring products into the market.

Standard Path:
Products are purchased post-import and are ready for sale, having completed all necessary registration and compliance processes.

South Korea's advanced e-commerce ecosystem offers New Zealand exporters fast, direct access to consumers through online marketplaces, specialist e-retailers, and branded storefronts. This supports targeted marketing, brand control, and scalable growth.

Korea's multi-channel distribution connects New Zealand exporters with both restaurants and consumers, supporting flexibility and trend responsiveness.



APPENDIX

Euromonitor Definitions

Consumer Foodservice by Type

Chained Consumer Foodservice: This category includes foodservice outlets that are part of a larger chain or franchise. These establishments typically have multiple locations, standardized menus, and consistent branding. Examples include global fast-food chains like McDonald's and Starbucks

Independent Consumer Foodservice: These are standalone foodservice outlets that are not part of a chain or franchise. They are usually owned and operated by individuals or small businesses. Independent establishments often offer unique menus and personalized service, reflecting the owner's vision and local culture

Full-Service Restaurants (FSR): These establishments offer a complete dining experience with table service, where customers are seated and served by waitstaff. They typically have a broad menu and a focus on ambiance and customer service

Limited-Service Restaurants (LSR): These include fast food and fast-casual restaurants where customers order at a counter and either take their food to go or eat it on-site. The service is quicker, and the menu is usually more limited compared to full-service restaurants

Cafés/Bars: This category includes coffee shops, tea houses, and bars. They primarily serve beverages, but many also offer light snacks or meals. The focus is often on the social experience and ambiance

Street Stalls/Kiosks: These are small, often mobile, food vendors that offer quick, affordable meals and snacks. They are typically found in high-traffic areas like markets, streets, and transportation hubs

Self-Service Cafeterias: These establishments allow customers to serve themselves from a variety of food options, usually displayed in a buffet-style setup. They are common in institutional settings like schools, hospitals, and workplaces

Consumer Foodservice by Location

Standalone: Outlets that operate independently and are not located within another business or facility. Examples: Street-front cafés, independent restaurants, and bars.

Retail: Foodservice outlets located within or attached to retail environments such as shopping malls, department stores, or supermarkets. Examples: Food courts, in-store cafés, and quick-service counters in malls.

Lodging: Foodservice operations located within hotels, motels, or other accommodation facilities. Examples: Hotel restaurants, room service, and hotel lobby cafés.

Leisure: The portion of the consumer foodservice market where meals and drinks are purchased and consumed within locations primarily associated with leisure activities, such as cinemas, theme parks, sporting venues, and entertainment complexes.

Travel: The provision of food and beverage services to consumers who are either traveling or on the go. This encompasses various channels like on-premises dining, delivery, takeaway, and drive-through.

Euromonitor Definitions

Consumer Foodservice Cuisine by Category (Full-Service)

Asian: Includes cuisines from East, Southeast and East Asia, (E.g. Korean, Japanese, Chinese, Thai, Vietnamese etc).

North American: Primarily refers to US and Canadian- style foodservice formats (E.g, Burgers and fries, BBQ, Tex-Mex, Diners and Casual Grills)

European: Covers cuisines from Western and Southern Europe, including Italian, French and Spanish dining.

Pizza: Includes pizza chains and independent pizzerias.

Other: Aggregation of cuisines that do not fit neatly into the above, such as Middle Eastern, African, Latin American, Fusion or niche concepts.

Consumer Foodservice Cuisine by Category (Limited-Service)

Chicken: Refers to limited-service outlets specialising in chicken-based meals, including fried chicken chains, grilled or roasted chicken formats and chicken-focused menus etc.

Bakery Products: Covers outlets offering baked goods as the core product. This includes bread, pastries, cakes, and sandwiches, café style bakeries and grab-and-go formats.

Burger: Restaurants where burgers are the primary menu item, typically accompanied by fries and soft drinks, ranging from fast-food to gourmet concepts.

Ice Cream: Foodservice outlets focused on frozen desserts, including ice cream parlours, soft-serve shops, and gelato vendors.

Pizza: Dedicated pizza outlets offering dine-in, takeaway, or delivery, often tracked separately due to their distinct business model and global presence.

Convenience Store: Foodservice sales within convenience stores, including ready-to-eat meals, snacks, and beverages, often served from hot counters or microwavable formats.

Other: A catch-all category for cuisines and formats not covered by the main segments, including Middle Eastern, African, fusion, and emerging concepts.

Consumer Foodservice Cuisine by Category (Café/Bars)

Bars/Pubs: Establishments primarily focused on serving alcoholic beverages, often with limited food options, and positioned for social or nightlife occasions.

Cafés: Casual venues offering light meals, snacks, and beverages, typically centered around coffee and tea, with a focus on social or leisure visits. (E.g. Angel-in-us, Ediya Coffee etc)

Specialist Coffee and Tea Shops: Outlets dedicated to premium coffee and tea offerings, often emphasizing quality, branding, and experience, with limited food menus. (E.g. Starbucks, Hollys etc,)

Juice/Smoothie Bars: Venues specializing in freshly prepared juices, smoothies, and health-focused beverages, often positioned around wellness and convenience.



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