



INSIGHT SURVEY
B2B Market Research

SOUTH AFRICAN FAST FOOD/QSR INDUSTRY LANDSCAPE REPORT

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COMPANY OVERVIEW



Insight Survey is a South African, boutique market research agency with more than 15 years of experience, specialising in Business-to-Business (B2B) and Industry research to ensure smarter, more-profitable business decisions are made with reduced investment risk.

We offer **B2B market research solutions** to help you to successfully improve or expand your business, enter new markets, launch new products or better understand your internal and external environment.

We believe in the advantage market research gives business leaders to fully understand their industry, facilitate business strategy, improve company performance, and drive company growth.

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INDUSTRY & COMPETITOR INTELLIGENCE

Our bespoke Industry and Market Intelligence can help give the edge in a global marketplace, empowering your business to overcome industry challenges quickly and effectively, and enabling you to realise your potential and achieve your vision. From strategic overviews of your business's competitive environment through to specific competitor profiles, our customised Intelligence is designed to meet your unique needs.

QUESTIONS WE HELP ANSWER

- What is the current and future market size?
- What are the latest global and local trends impacting on the market?
- Who are your key competitors and what is their offering in terms of products, services, pricing and branding?





OUR RESEARCH SOLUTIONS

- Competitor pricing research
- Store visits and store checks
- Competitor interviews
- Customer interviews
- Company website analysis
- Governmental held records

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OUR FOOD AND BEVERAGE EXPERIENCE

We are a proudly South African company that have provided market research solutions and Intelligence reports to local and global brands. We have worked with some of the greatest companies and brands in their industries.

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REPORT OVERVIEW

The **South African Fast Food/QSR Industry Landscape Report (182 pages)** provides a dynamic synthesis of industry research, examining the local and global **Fast Food/QSR industry** from a uniquely holistic perspective, with detailed insights into the entire value chain – market size, industry trends, innovation and technology, industry drivers and challenges, Fast Food/QSR retail and competitor analysis, latest marketing and advertising news, pricing and promotion analysis.

SOME KEY QUESTIONS THE REPORT WILL HELP YOU TO ANSWER:

For the Global Fast Food Industry Section:

- What are the current market dynamics of the Global Fast Food industry?
- Which are the key markets within the Global Fast Food industry?
- What are the latest Global Fast Food industry trends, innovation and technology, drivers, and challenges?

For the South African Fast Food Industry Section:

- What are the current market dynamics (market size and market value): 2019-2024 Actual, 2025-2029 Forecasts?
- What are the latest South African Fast Food industry trends, innovation and technology, drivers, and challenges?
- What are the South African trends in terms of food festivals, food markets, food trucks, and online ingredient delivery services?

For the South African Fast Food Retail and Competitor Analysis Section:

- Which are the key players in the South African Fast Food industry by category: Burgers, Chicken, Pizza, Pies, and Other?
- For each key Fast Food competitor, what is the latest company news in terms of products, services, and new launches?
- What is the latest marketing and advertising news (including social media) for each of the Fast Food competitors?

For the South African Fast Food Pricing Analysis Section:

- What are the prices and recent promotions of popular Fast Food brands by category: Burgers, Chicken, Pizza, Pies, and Other?

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SCREENSHOTS FROM REPORT

182-page report filled with detailed charts, graphs, and insights



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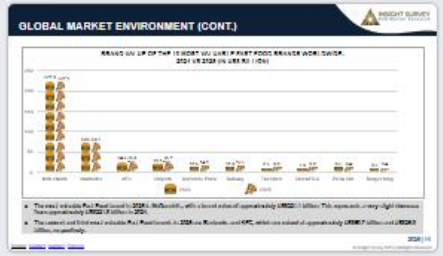
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The global Fast Food market is expected to reach an estimated value of approximately US$1.07 trillion in 2025*, as illustrated in the adjacent graph. Moreover, the market is expected to grow at a compound annual growth rate (CAGR) of 8.4%, for the forecast period 2025* to 2030*, to reach approximately US$1.60 trillion by 2030*.

- The expansion of the Fast Food market is largely driven by the increasing adoption of digital technologies in response to changing consumer demands for greater convenience, personalisation, and streamlined digital interactions. Specifically, the integration of advanced innovations such as artificial intelligence (AI), predictive analytics, and the Internet of Things (IoT) is enhancing operational efficiency and customer experience.
- Additionally, the Fast Food industry is experiencing continued growth through strategic promotions and value-for-money meal offerings. Particularly, attractive deals and affordable menu options have boosted customer engagement and sales for leading brands, positioning value-driven offerings as a key ongoing growth driver in the industry. More specifically, consumers are increasingly drawn to Fast Food offerings that deliver strong value for money, particularly among lower-income groups.
- Globally, the growing demand for Fast Food and quick service restaurants (QSRs) is also being driven by the shift in consumer lifestyles, increasing urbanisation, and a heightened emphasis on convenience. This is driving the growth of the global Fast Food market by meeting the demand for time-saving meal solutions that cater to the fast-paced lifestyles of urban consumers seeking quick and convenient food options.
- In terms of market segmentation, the global Fast Food market is segmented by end-user, into Quick Service Restaurants (QSR), Food-Service Restaurants, Catering, and Others.
- In 2024, QSR remained the dominant segment and is expected to continue to hold the largest market share, due to its ability to provide quick, efficient, service to individuals and families looking for a convenient and rapid dining options.
- The market is also segmented based on product type, with the global Fast Food and Quick Service Restaurants market being segmented into Pizza/Pasta, Burgers/Sandwich, Chicken, Asian/Latin American Food, Seafood, and Others. The Burgers/Sandwich segment continues to dominate the market, due to ease of consumption as well as the ability to assemble and serve these menu items quickly.

VALUE OF THE GLOBAL FAST FOOD MARKET: 2025 & 2030* (IN US$ TRILLION)



** Forecast*

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Uber Eats Cravings Report 2024 Reveals South Africans' Fast Food Quirks

- Uber Eats' 2024 Cravings Report offers a revealing snapshot of South Africans' delivery habits, showcasing how food preferences, spending habits, and personalised orders have evolved in the past year. The insight-rich findings demonstrate the lengths consumers go to get exactly what they crave, whether that be crispy chicken with pap at midnight or a luxury cognac for indulgence, amongst other habits and preferences.
- In particular, the findings show that South Africans remain passionately devoted to crispy chicken, with it topping the most-searched items on the app and often paired with pap as the most requested side dish.
- Additionally, Johannesburg and Pretoria earned their reputations as the late-night snacking hubs, combining for over 1.2 million delivery requests between 11 PM and 3 AM. This demonstrates South Africans' nocturnal appetite and late-night ordering habits.
- Furthermore, local cuisine continues to play a central role in food preferences, with luxury indulgences included in the ordering mix. The year's most expensive single order was a bottle of premium cognac, costing the user more than R20,000 in one transaction.
- Meanwhile, Durban emerged as the most vegan-friendly city, with plant-based meals accounting for a solid 0.6% of all orders, although Johannesburg and Pretoria collectively placed the bulk of vegan requests, highlighting evolving dietary diversity in the market.
- Moreover, Margate was indicated to be the friendliest city, with Johannesburg and Pretoria close behind, as users consistently included 'please' and 'thank you' in their instructions. Meanwhile, other segments of the report highlighted the dedication of frequent users, with one customer placing 2,378 orders in a year (an average of six per day), and another ordering for 364 out of 365 days.
- At the same time, the savings elite were equally impressive, one Uber One subscriber saved over R18,000 across 779 orders.
- Delivery partners clocked monumental effort, too. As an example, one courier logged nearly 40,000 km, almost enough to circle the globe along with some 4,500 service hours and nearly 8,000 trips. Another driver delivered 320 orders to the same loyal customer.
- Finally, the report spotlights the creativity of South Africans' customisation culture. One customer requested 'three jolly eggs' in their ramen through a whimsical verse, while another wrote 'no garnish, no sauce, crispy chips!!!' across eight different orders, underscoring how textual flair and texture preferences have found a home in everyday delivery.





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Pedros and BP Partner to Launch Drive-Through in Centurion

- In April 2025, flame-grilled chicken brand Pedros partnered with BP Southern Africa to launch a drive-through restaurant at the BP Elardus Park service station in Centurion.
- The collaboration brings together fuel convenience and fast-food efficiency, offering customers a seamless, on-the-go dining experience. The drive-through outlet serves Pedros' full menu, including its popular flame-grilled chicken, wraps, and sides, with quick turnaround times for motorists. The initiative reflects both brands' commitment to innovation, convenience, and adapting to shifting consumer behaviours favouring speed and accessibility.
- This partnership marks a strategic move for Pedros as it expands its national footprint through non-traditional formats. With more fuel station collaborations under consideration, the model is set to play a key role in Pedros' growth strategy while enhancing BP's retail value proposition.



Pedros® FLAME GRILLED CHICKEN

Tasty Nation Launches First Quick-Service Restaurant in Sunninghill

- In February 2025, Tasty Nation marked a major milestone with the opening of its first quick-service restaurant at Chilli Lane Shopping Centre in Sunninghill, Johannesburg.
- The launch signals the brand's entry into the competitive QSR market with a strong focus on flavourful, locally inspired meals. The restaurant offers a bold and diverse menu featuring burgers, flame-grilled chicken, loaded fries, and signature sauces, all crafted to celebrate local preferences.
- Designed for speed and convenience, the outlet caters to both dine-in and takeaway customers, with efficient service and a vibrant, modern setting. Tasty Nation's entry into physical retail underscores its ambition to scale within South Africa's fast-growing Fast Food segment.
- With future expansion plans, the brand is positioning itself as a dynamic new player driven by quality, innovation, and a proudly local identity.



TASTY® NATION

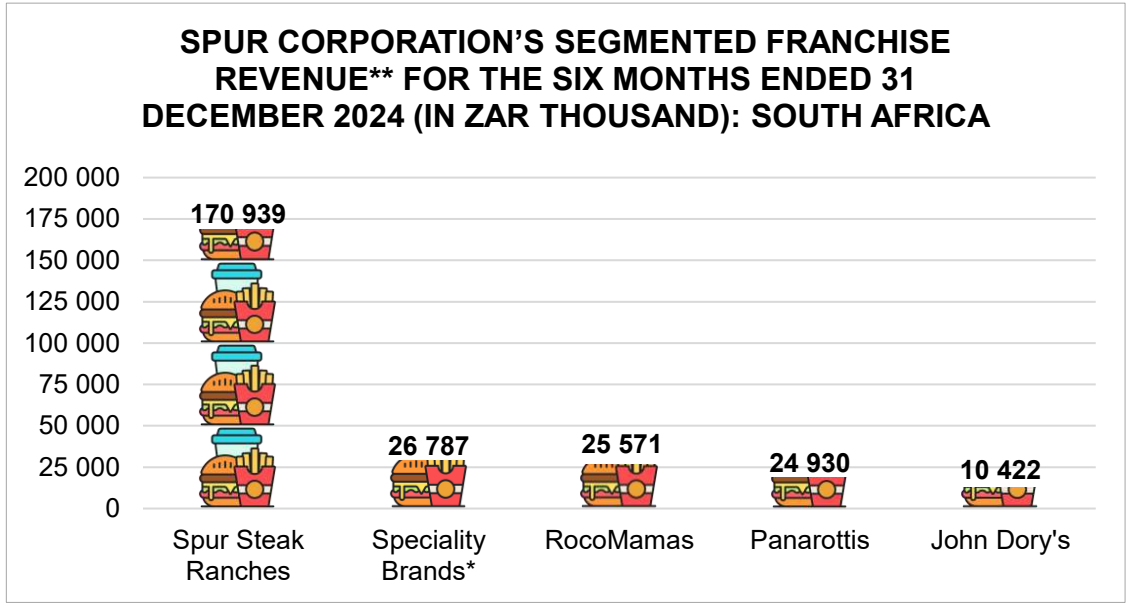
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SAMPLE FROM REPORT
RETAIL ANALYSIS: SPUR CORPORATION

According to Spur Corporation's unaudited condensed consolidated financial results for the six months ended 31 December 2024, the Group's revenue increased by 13.8%, from approximately R1.7 billion in 2023 to approximately R2.0 billion in 2024, as illustrated in the adjacent table.

- South African operations, which accounted for the majority of the Group's performance, saw revenue grow by 10.4%. International operations also delivered strong results, with a year-on-year increase of 23.0%.
- As illustrated in the adjacent graph, segmental revenue from Spur Corporation's South African restaurant brands increased across the board, excluding Manufacturing and Distribution, Retail, Marketing, and Other segments. Notably, Spur Steak Ranches remained the Group's top performer, with franchise revenue increasing by 3.3% from approximately R165 million in 2023 to approximately R171 million in 2024.
- Speciality Brands*, which includes The Hussar Grill, Casa Bella, Nikos, Doppio Zero, Piza e Vino and Modern Tailors, followed with revenue increasing by 96.8% year-on-year, from approximately R13.6 million on 2023 to R26.8 million in 2024.
- According to the Group, key growth drivers included Panarottis' successful small-town expansion strategy, RocoMamas' enhanced marketing, and Spur Steak Ranches' refreshed store formats, which resulted in double-digit turnover growth. Additionally, the Virtual Kitchen (VK) brands continued to show momentum, driven by ongoing innovation and improved operational efficiencies.

Spur Corporation's Unaudited Condensed Consolidated Financial Results (in ZAR Thousand)	Six Months Ended	
	31 December 2024	31 December 2023
Revenue	R2,009,872	R1,766,210
Gross Profit	R639,074	R533,559
Operating Profit before Net Finance Income	R203,764	R174,968
Profit	R153,546	R136,666



***The graph excludes the Manufacturing and Distribution (R1.3 billion), Retail Company Stores (R141.4 million), Marketing (R186.2 million), and Other South Africa Segments (R37.8 million).*
**Speciality Brands include The Hussar Grill, Casa Bella, Nikos, Doppio Zero, Piza e Vino and Modern Tailors.*

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SAMPLE FROM REPORT
ROCOMAMAS: COMPANY NEWS

RocoMamas Launches R10,000 '#RMGenFree' Youth Giveaway

In June 2025, RocoMamas invited fans to express what 'Youth + Freedom + Not Normal' means to them by posting a creative image or video on social media. More specifically, participants were encouraged to tag the company's Facebook page, as well as use the hashtag '#RMGenFree', and post by 17 June 2025 to stand a chance to win R10,000. ***(13 June 2025)***

RocoMamas Announces Launch of New Limited-Edition Texan Range

In May 2025, RocoMamas announced the launch of its limited-edition Texan Range, describing it as the 'Most Wanted' for its fiery, flavour-packed profile. The launch was supported by playful, Western-themed messaging, positioning the new range as the 'new sheriff in town' and urging consumers not to miss out on the bold new offering. ***(16 May 2025)***

RocoMamas Expands Local Footprint and Drives Sales Growth

In March 2025, RocoMamas expanded its presence in South Africa by opening two additional outlets, bringing its total to 87 stores nationwide. Although two international locations in Saudi Arabia closed, local marketing efforts and product innovation drove a 6.9% increase in its like-for-like sales. RocoMamas now accounts for 10% of Spur Corporation's total South African sales. ***(5 March 2025)***

RocoMamas Partners with Lasizwe for 'Awkward Dates' Show

In January 2025, RocoMamas partnered with YouTuber Lasizwe Dambuza as the new home for his hit show Awkward Dates. With over 90 stores nationwide, Dambuza highlighted that the goal was to showcase how audiences can share the same meal experience while also illustrating the power of influencer collaborations to drive brand engagement. ***(22 January 2025)***

RocoMamas Relaunches Limited Time 'Two-Way Treat' Offer

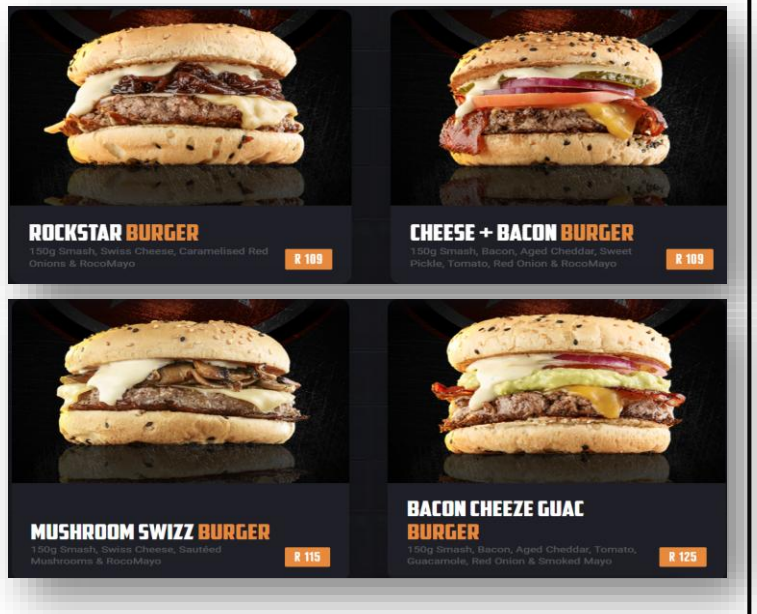
In January 2025, RocoMamas announced the return of its limited-time 'Two-Way Treat' offer. More specifically, consumers were offered two flavour-packed options for just R119, with the option of either a starter and main, or a main and dessert. For those wanting the full experience, an additional R35 unlocked the 'Triple Treat' combo, with the offer available until 2 March 2025. ***(20 January 2025)***

RocoMamas Recognised with 'Ask Afrika Orange Index Award'

In September 2024, RocoMamas was recognised with an 'Ask Afrika Orange Index Award' for Casual Dining, following South Africa's largest customer experience survey for 2024/2025. In particular, the award was based on ratings from over 48,000 consumers across 26 industries, with RocoMamas crediting the win to its loyal 'RocoFam' and dedicated team. ***(5 September 2024)***

RocoMamas Stores:

2025: 89 SA Stores (estimate*)





**Store count obtained from company website.*

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SAMPLE FROM REPORT
STEERS: MARKETING AND ADVERTISING NEWS

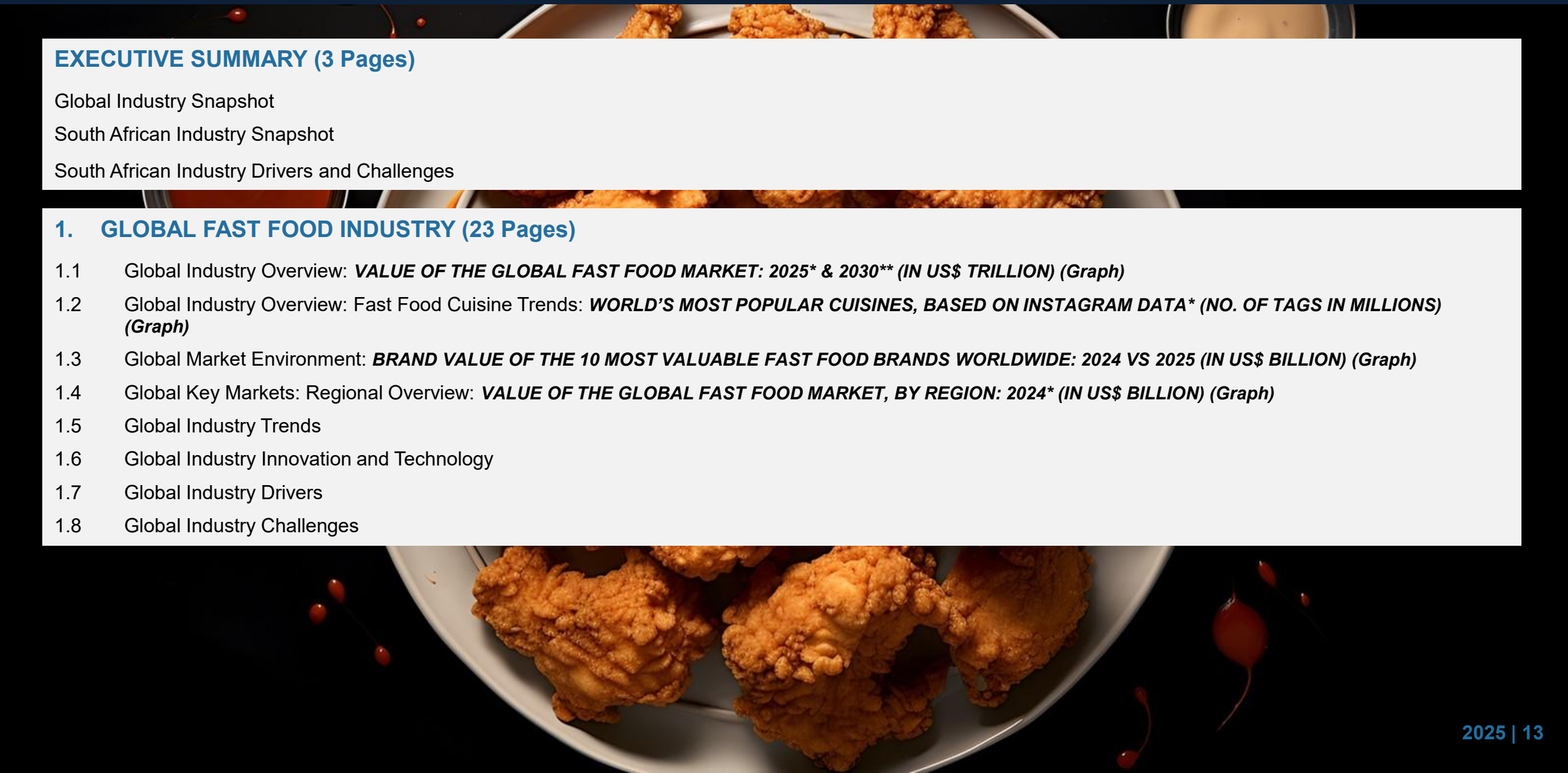
Steers positions itself as a vibrant, youth-focused Fast Food brand that offers value-for-money meals, emphasising authenticity through its promise of 'Real' food and flavour. The brand promotes inclusivity and passion, reinforced by slogans like 'Savour that Real Flavour' and 'Flame-Grilled. It Just Tastes Better.'

- In terms of its marketing and advertising, Steers utilises social media to promote several of its value-driven offerings, limited-time meals, app-exclusive deals, and competitions. With humorous and high-energy content, the brand effectively engages a youthful audience while showcasing its promotions and product variety in a dynamic, relatable way.
- A core promotional driver is the long-standing '#WackyWednesday' campaign, which offers a buy-one-get-one-free burger deal every Wednesday. This mid-week activation continues to be a major traffic generator and remains central to reinforcing Steers' promise of everyday value.
- Another value-led campaign came in the form of the Classic Cheese Burger and Chips meal, promoted as an affordable, everyday indulgence. This meal was supported by the '#ClassicCheeseBurger' Competition, where customers stood a chance to win Cotton Fest tickets by sharing a photo of their meal online. In partnership with Coca-Cola, the campaign also included a high-impact vehicle giveaway, with entrants competing to win a brand-new Suzuki Swift, effectively boosting online engagement and enhancing brand visibility.
- In line with its indulgent, real food positioning, Steers introduced the Phanda Cheesy BBQ Double Burger, promoted as the ultimate comfort meal for cheese lovers. This product launch further reinforced the brand's commitment to flavour-forward meal bundles.
- To resonate with younger audiences and highlight its full-flavour identity, Steers collaborated with local influencers for the launch of its BBQ Wings & Chips offering. Through relatable content featuring personalities like Philani Mthembu, Shawnee Reid, and Lemi Loco, the campaign showcased the product in everyday settings while deepening the brand's youth appeal.
- To drive digital convenience and boost app usage, Steers ran several app-exclusive deals and promotions. These included the '#TreatYoSelf' campaign, which rewarded users with a free 1-litre Coke® Zero Sugar with online orders. Additional app-only products like the Mo'Jojo Burger Meal, the Chicken Burger Duo Meal, and the Oreo Shake further expanded the menu's appeal, while staying true to Steers' signature bold flavour and value proposition.



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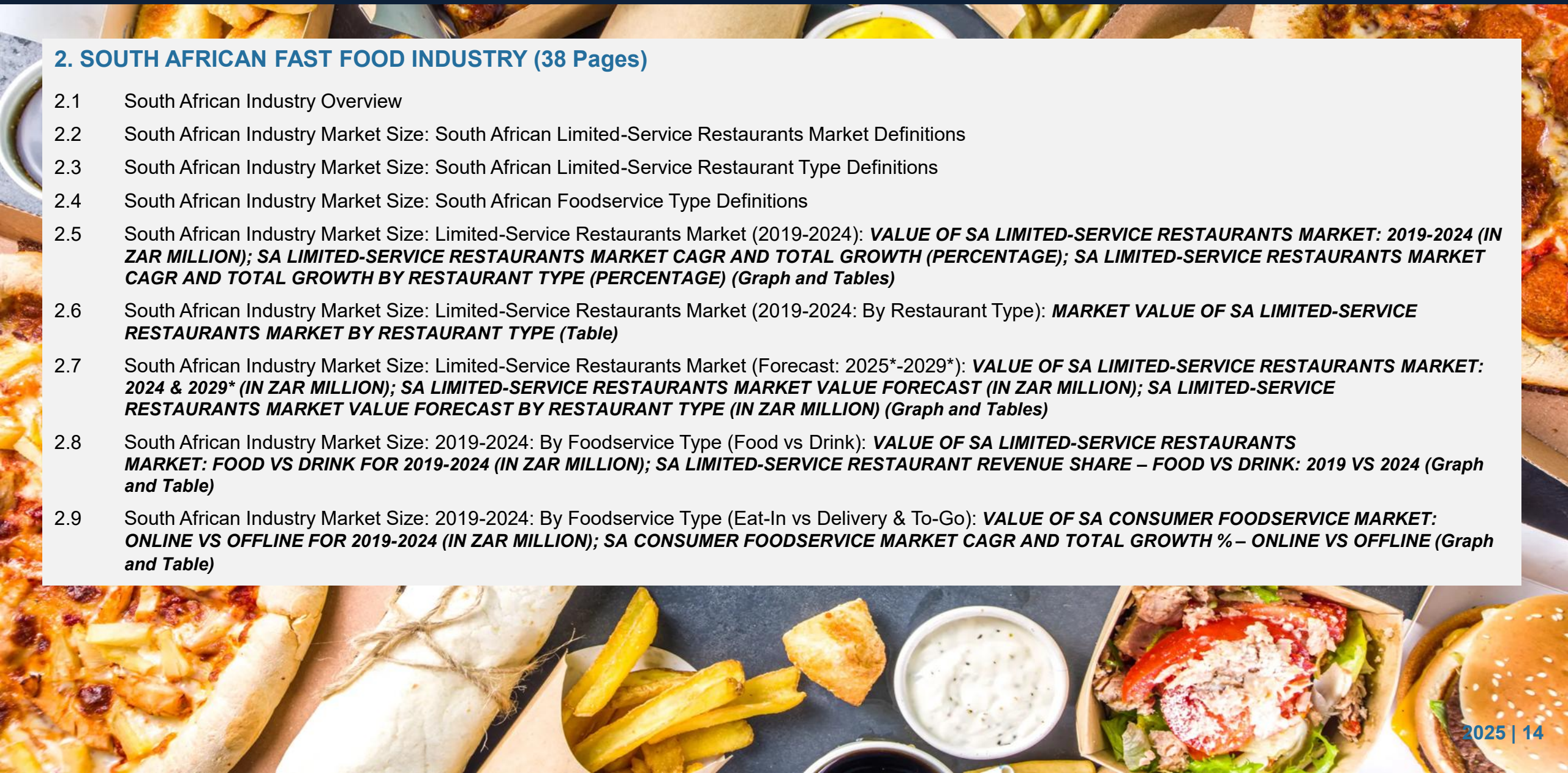
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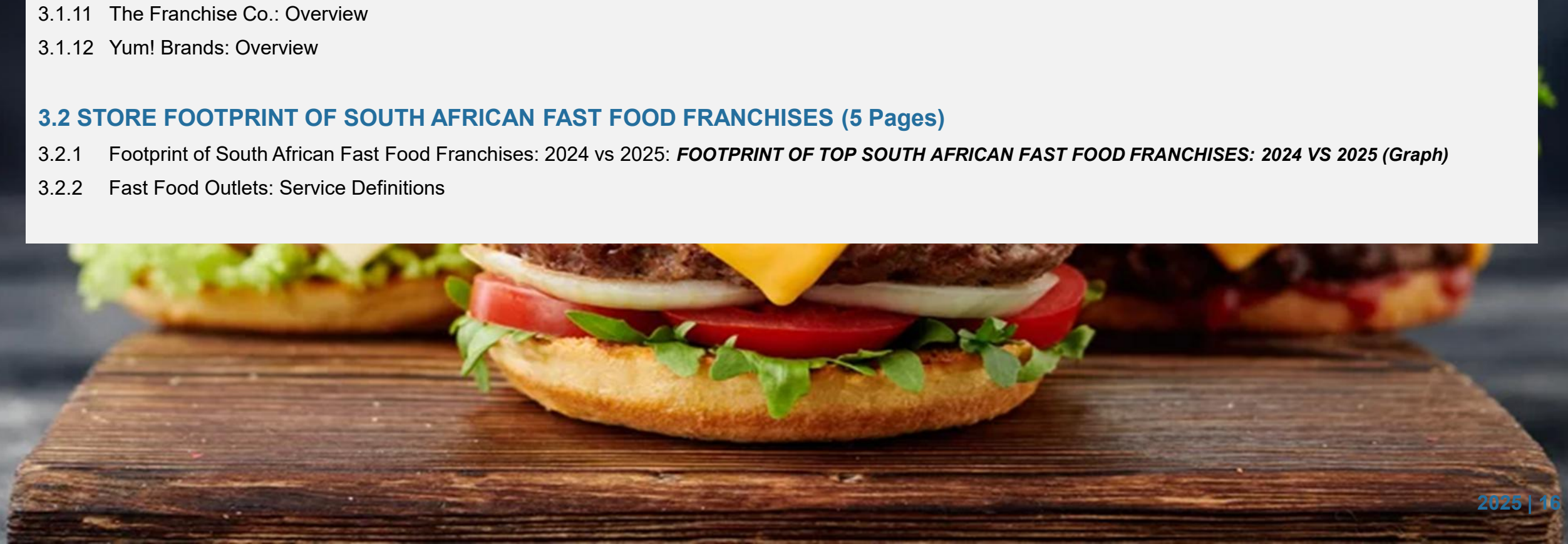


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