

THE 2023 PROVEG SOUTH AFRICA PLANT-BASED FRIENDLY FAST-FOOD FRANCHISE RANKING

A review of the plant-based offerings at South Africa's top fast-food franchises



INSPIRED BY CHICKEN, PERFECTED BY PLANTS.



Calories
110

Protein
16 g

Carbs
0,3 g



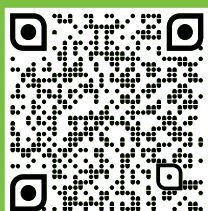
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EXECUTIVE SUMMARY

Introduction

Fast-food chains across the globe are jumping on the decision to include more plant-based options on their menus. South Africa is no stranger to this, with a variety of Quick Service Restaurants (QSRs) targeting vegan, vegetarian, and flexitarian consumers. As a food awareness organisation, ProVeg South Africa sought to assess the plant-based fast-food landscape by means of an annual Plant-Based Fast-Food Ranking. Following the 2022 Plant-Based Friendly Fast-Food Franchise Ranking, the 2023 ranking is the second version of the ranking. The purpose of the annual ranking is to encourage consumers and QSRs alike to choose and supply more plant-based options, as well as to provide QSRs with insights into how to better perform in the plant-based industry.

Criteria



Provide, as a minimum, full portion breakfast, lunch or dinner options.



Have outlets in more than one province in South Africa.

50

Have more than 50 outlets within South Africa at the time of data capturing.



Have a standardised national menu.



Offer a takeaway menu, for collection or delivery, that comprises the majority of their standard menu.

Methodology

The methodology of the ranking followed along similar lines as the 2022 ranking, with some changes made to the evaluation criteria. Points awarded for advertising were removed from the ranking, and more focus was given to the immediate consumer experience of a chain's menu presentation and labelling of the offerings.

Overall, QSRs were awarded points based on: the number of plant-based mains, the percentage of plant-based mains, the number of side dishes, the percentage of plant-based side dishes, the number of plant-based desserts, the percentage of plant-based desserts, and finally, the QSRs menu labelling and presentation.

Results

Mains, Sides and Desserts

Number of Offerings

Category	2023	2022	Percentage Change from 2022 to 2023
Mains	54	45	16.67% increase 
Sides	79	64	18.99% increase 
Desserts	8	10	20 % decrease 

Category	2022	2023
Mains	54/1097 = 4.92% plant-based ↓	45/868 = 5.2% plant-based
Sides	79/338 = 23.4% plant-based ↑	64/307 = 20.9% plant-based
Desserts	8/119 = 6.72% plant-based ↓	10/116 = 8.6% plant-based

Ranking 2023 vs 2022

2023		
Rank	Restaurant	Score
1	 Kauai	18.88
↑ 2	 Simply Asia	17.32
3	 Panarottis	13.62
↑ 4	 Nando's	10.22
↓ 5	 Burger King	9.31
↓ 6	 Spur	9.14

2022		
Rank	Restaurant	Score
1	 Kauai	10.5
2	 Spur	8.5
3	 Panarottis	8
4	 Burger King	7
5	 Simply Asia	7
6	 Steers	5.25

Conclusion

QSRs have many opportunities to expand in the plant-based industry based on the quantity and types of plant-based dishes provided, how they appeal to current and potential consumers, and how well these items are presented on their menus. QSRs have the platform to showcase plant-based eating in an appealing and accessible way to the average fast-food eating South African. They are uniquely positioned to play an influential role in promoting plant-based eating more broadly. The report finally finds that it is essential for QSRs to work with industry experts and to focus their approach to their plant-based visions to best maximise the opportunities presented by the plant-based landscape in South Africa.

Disclaimer:

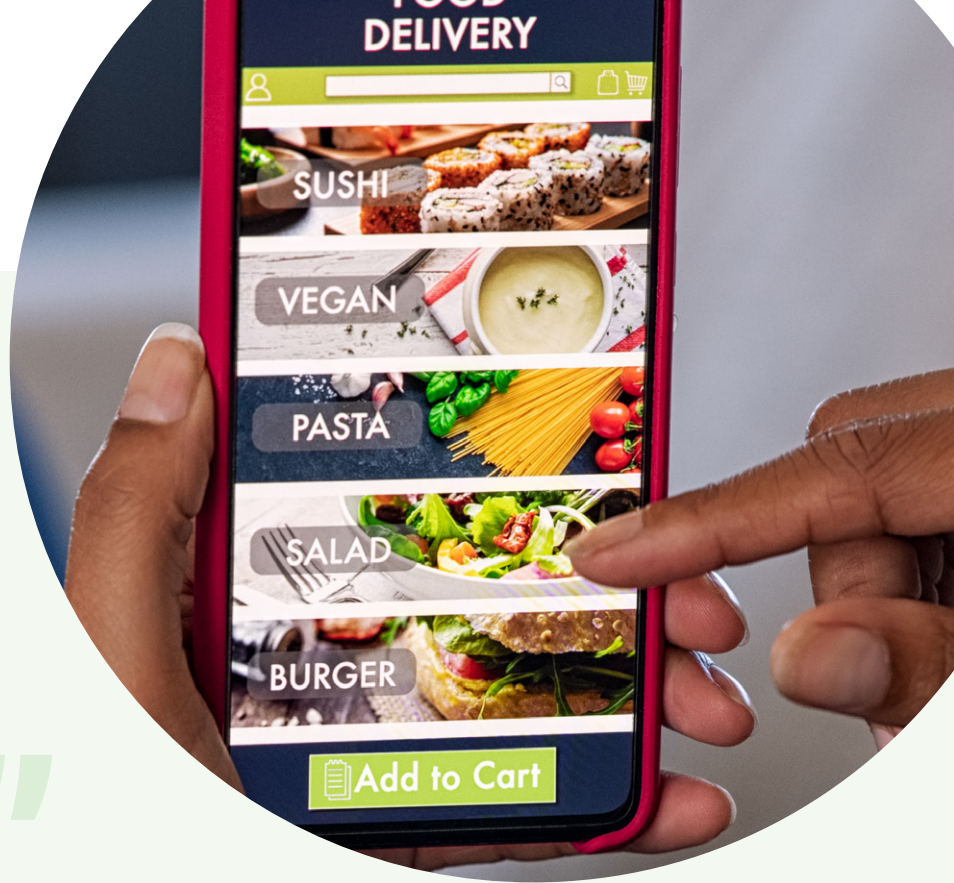
All information contained in this report, including plant-based descriptors, product names and ingredients were sourced and collated from publicly accessible platforms made available by the respective brands. While all products included are advertised as plant-based, this report does not consider possible cross-contamination in the food preparation, storage or packaging process. For specific information relating to a particular product, kindly contact the outlet directly.



INTROUCTION

The report once again highlights significant opportunities available in the plant-based space within QSRs in South Africa; from new products that still need to be developed and gaps on menus to be filled by existing products, to ways for outlets to attract more customers.

**- Donovan Will, Director
ProVeg South Africa**



It is widely understood that the South African market has a steady appetite for fast-food. Challenges such as the COVID-19 pandemic and the ongoing crisis of load-shedding have contributed to an increase in fast-food consumption by South Africans, with a 33.1% rise in consumption since 2019¹. The rise in fast-food consumption provides us with a unique opportunity to pay attention to the current and growing areas of change in the industry - and the plant-based sector in particular.

The plant-based industry in South Africa has been gradually developing, and reflects a global shift in consumer choices towards more healthy, ethical and environmentally friendly lifestyles. The vegan, vegetarian and flexitarian consumer embodies this shift, making up to 10% - 12% of the South African consumer base as of 2023². Responding to the presence of this consumer base, South African fast-food chains have quickly and innovatively adopted plant-based options, providing exciting new food choices for South African consumers.

ProVeg South Africa noted this shift, and sought to explore the fast-food plant-based market in South Africa. This process started in 2022,

with the 2022 Plant-Based Friendly Fast-Food Franchise Ranking, which provided a menu review of plant-based offerings at South Africa's top fast-food and restaurant franchises. The 2023 report conducts a similar review, with some adjustments made for menu presentation and labelling.

The focus of the report looked at the number of plant-based offerings at major QSRs as a central measure for performance in the plant-based space. Further conclusions about advertising, consumer perception and other aspects of performance were extracted over the course of the report, providing additional insights into the fast-food and plant-based industries in South Africa.

The purpose of this report is to scope out the status of the inclusion of plant-based options in the fast-food industry in South Africa. This is done through a ranking of performance, with the intention of encouraging QSRs to innovate, grow and promote the industry. Ultimately, the report finds that, despite this gradual awareness and resulting change, QSRs have many opportunities for growth in the plant-based industry in South Africa.

¹ ("14 biggest fast-food franchises in South Africa" 2023)

² (Nielsen and Unilever 2022)

DEFINITIONS AND LIMITATIONS

Definitions

FAST-FOOD



Popular food and beverages quickly supplied by commercial enterprises, eaten immediately, and affordably priced to meet customers' daily needs.

ANIMAL-BASED



Used to describe food products whose ingredients are sourced from animals.

PLANT-BASED



Used to describe food products whose ingredients are sourced from plants and do not include any animal parts or by-products.

OMNIVORE



Used to describe a diet that is comprised of both plant foods and animal-based foods.

FLEXITARIAN



Also called a semi-vegetarian diet – is one that is centred on plant foods with limited or occasional inclusion of meat.

VEGETARIAN



Used to describe food products whose ingredients do not include animal-based meat, but which may contain animal-based eggs, dairy, or ingredients derived from them.

VEGAN



Used to describe plant-based food products made and prepared without animal based ingredients or animal by-products, where cross-contamination is strictly avoided.

QUICK SERVICE RESTAURANT (QSR)



Refers to a restaurant which offers certain food items that require minimal preparation time, and are delivered through quick services.

Limitations

The assessment did not include a thorough review of accompanying beverages that would add value to the ranking. The rationale for this was that most customers decide where to order and eat based on the food offering, and see drinks as secondary. Beverages that can be considered a meal or are consumed on their own, such as milkshakes and smoothies, were considered part of the assessment where appropriate. A few restaurants that offer free plant-based milk options with their hot beverages were acknowledged in the Evaluation section of the report.

METHODOLOGY

Restaurant Selection Criteria

QSRs needed to meet the following criteria to be included in the ranking:



Provide, as a minimum, full portion breakfast, lunch or dinner options.



Have outlets in more than one province in South Africa.

50

Have more than 50 outlets within South Africa at the time of data capturing.



Have a standardised national menu. Specials and store specific items were not permitted.



Offer a takeaway menu, either for collection or delivery, that comprises the majority of their standard menu.

Data Gathering

All data was gathered and assessed by the ProVeg South Africa team, and no stage of the methodology was outsourced to a third party. Data collected from each fast-food franchise is publicly available, both online and in-restaurant.

We ensured compliance with the selection criteria by referencing company websites, and by email and telephonic communication with each company in the case of confusion about an offering. Websites provided standard menu items, ingredient lists and allergen charts, while any missing data was further investigated and researched by our team.

Ingredients were verified by the companies' head office or by a restaurant representative. Our analysis refers to the state of menus up to 31 August 2023.

Ranking & Evaluation

Once the data was gathered it was input into a formula system that created the final ranking. The formula system awarded points for the number of plant-based dishes on a menu, as well as their share of the total menu. Points were also awarded for menu presentation based on a variety of categories listed in the table on the next page:



Evaluation Categories

Category	Descriptor	Points
Mains	Total plant-based mains 1 point per item, uncapped.	1 point per item
	Plant-based percentage of mains (No of plant-based mains ÷ Total mains) x 10	Maximum 5 points
Sides	Total plant-based side dishes QSRs are initially given 1 point for 1 dish, and then points increase incrementally by 0.25 points per dish until 2 points are reached. Thereafter, QSRs remain capped at 2 points with every addition.	Maximum 2 points
	Plant-based percentage of side dishes (No of plant-based sides ÷ Total sides) x 2	Maximum 1 point
Desserts	Total plant-based desserts QSRs are initially given 1 point for 1 dish, and then points increase incrementally by 0.25 points per dish until 2 points are reached. Thereafter, QSRs remain capped at 2 points with every addition.	Maximum 2 points
	Plant-based percentage of desserts (No of plant-based sides ÷ Total sides) x 2	Maximum 1 point
Menu Presentation	<i>Label Appeal - used to determine signs for ease of identification of a plant-based option.</i>	
	No labelling of plant-based options	0
	Allergens list provided	0.125
	Poor Labelling - The menu provides only an ingredients list or disclaimer for determining what is in an item.	0.25
	Decent Labelling - The label refers to plant-based items as "vegan," or "meatless," etc.	0.5
	Good Labelling - The label refers to plant-based items as "plant-based," "made from plants," "100% plants," etc.	0.75
	Great Labelling - The label is a unique symbol or pictograph to identify plant-based menu items, like a "V" or a leaf.	1
	<i>Item integration - to indicate if the placement of the plant-based options are listed with the non-plant-based options.</i>	
	Yes	1
	No	0
	<i>Naming Convention - used to determine how well an offering is named.</i>	
	None - name of the offering has no appeal.	0
	Decent - name of offering has a basic level of appeal with use of evident terms such as "vegan" or "veggie" in the name of offering.	0.5
	Good - name of offering has a more acceptable level of appeal with the use of more appealing terms such as "plant-based".	0.75
	Great - name marks the product as unique and eye-catching. E.g. use of core well-known ingredient names in the offering name such as "The Impossible Whopper" for a burger that uses an Impossible Burger patty as an ingredient.	1
	Mixed - mixed use of the above.	0.625
	<i>Positive Descriptors - appealing description for a plant-based item, like "protein," "chef's choice," "sizzling," "juicy," etc.</i>	
	Yes	1
	No	0
	<i>Substitutions - allows for the replacement of non-plant-based items with plant-based items (e.g. sauces, meat analogues, cheese etc).</i>	
	Dip, sauce, dressing, etc.	0.5
	No	0
	Overall menu	1

The evaluation criteria above reflects a noticeable change in scoring relative to the 2022 ranking. The 2022 ranking capped points for the number of mains, and included a category for advertising as well. The 2023 ranking has uncapped points for mains, has included more sub-categories for the menu presentation category, as well as removed the advertising category.

Allowing for an unlimited number of points for the number of plant-based mains lets QSRs increase their plant-based additions (to an infinite amount) without hitting an upper limit thus continually rewarding QSRs for adding more options to their menu. The addition of new categories to menu presentation, as well as the removal of the advertising category, was motivated by the need to understand the more specific consumer experience when it comes to ordering from QSRs.

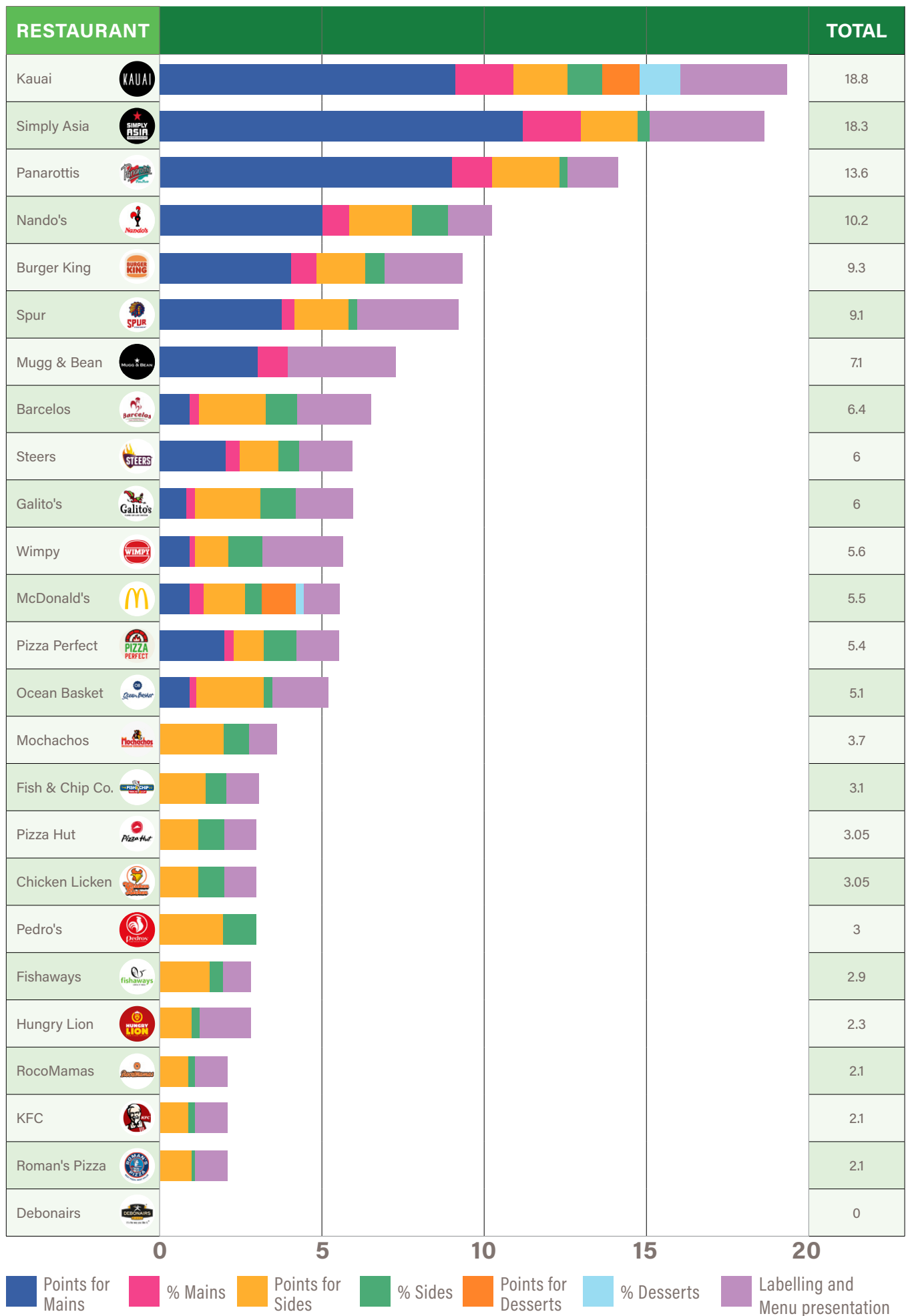
RESULTS

Final Results: Ranking

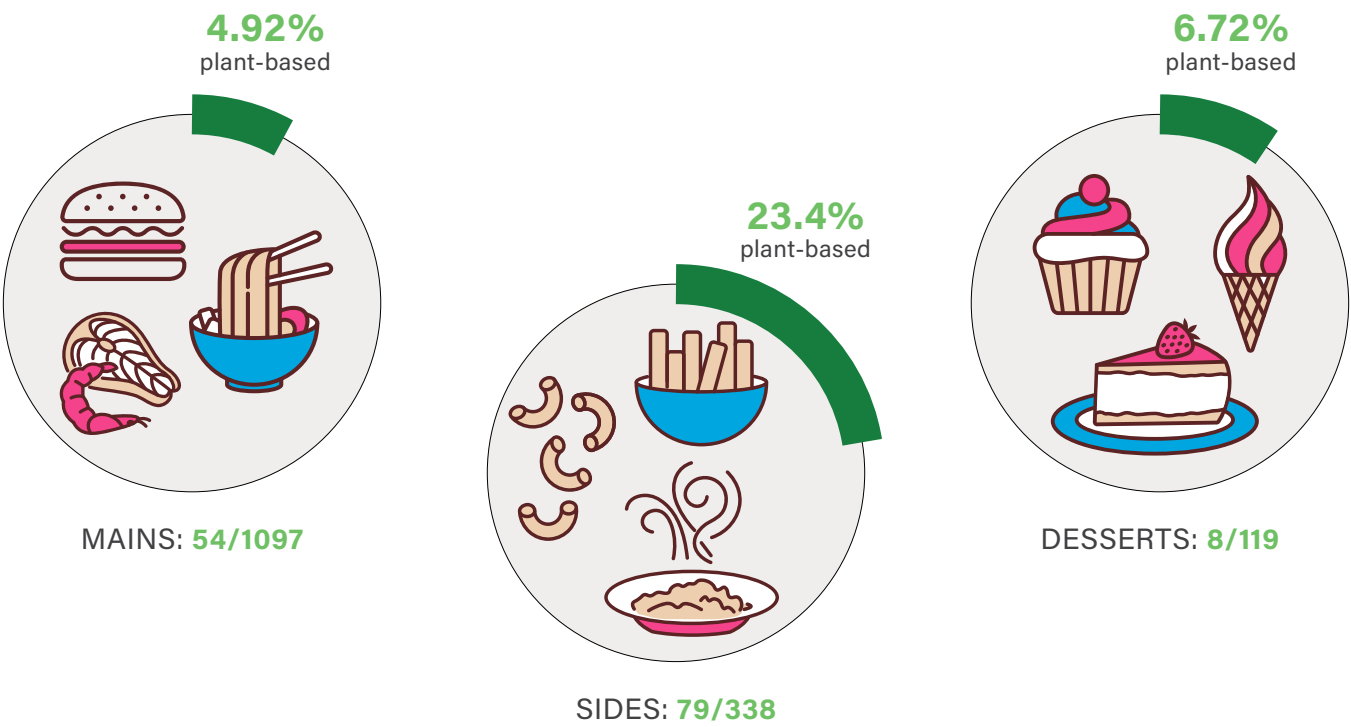
RANK	RESTAURANT		RANK	RESTAURANT	
1	Kauai		14	Ocean Basket	
2	Simply Asia		15	Mochachos	
3	Panarottis		16	Fish & Chip Co.	
4	Nando's		17	Pizza Hut	
5	Burger King		18	Chicken Licken	
6	Spur		19	Pedros	
7	Mugg & Bean		20	Fishaways	
8	Barcelos		21	Hungry Lion	
9	Steers		22	RocoMamas	
10	Galito's		23	KFC	
11	Wimpy		24	Roman's Pizza	
12	McDonald's		25	Debonairs Pizza	
13	Pizza Perfect				



Score Breakdown



Mains, Sides and Desserts



Comparison to 2022

Number of Plant-Based Menu Items

Type	2023	2022	Percentage Change from 2022 to 2023
Mains	54	45	16.67% increase ↑
Sides	79	64	18.99% increase ↑
Desserts	8	10	20 % decrease ↓

Percentage Share

Category	2023	2022
Mains	54/1097 = 4.92% plant-based ↓	45/868 = 5.2% plant-based
Sides	79/338 = 23.4% plant-based ↑	64/307 = 20.9% plant-based
Desserts	8/119 = 6.72% plant-based ↓	10/116 = 8.6% plant-based

Changes to ranking and scoring are a result of QSRs changing their menu items by adding and removing plant-based offerings. Other changes in results are due to the new scoring system, as well as the addition of three new QSRs to the ranking that met the ranking criteria - Mugg & Bean, Pizza Perfect and Pedro's Chicken. Sausage Saloon was removed from the ranking, and will be ranked in a future 'Plant-Based Snack Food Ranking', scheduled for 2024.

Scores

2023

Rank	Restaurant		Score
1	Kauai		18.88
2	Simply Asia	 ↑	18.32
3	Panarottis		13.62
4	Nando's	 ↑	10.22
5	Burger King	 ↓	9.31
6	Spur	 ↓	9.14
7	Mugg & Bean		7.17
8	Barcelos	 ↑	6.47
9	Steers	 ↓	6.03
10	Galito's		6.02
11	Wimpy	 ↓	5.65
12	McDonald's	 ↓	5.52
13	Pizza Perfect		5.49
14	Ocean Basket	 ↑	5.19
15	Mochachos	 ↓	3.71
16	Fish & Chip Co.	 ↑	3.1
17	Pizza Hut	 ↓	3.05
18	Chicken Licken	 ↓	3.05
19	Pedro's		3
20	Fishaways	 ↓	2.93
21	Hungry Lion	 ↓	2.33
22	RocoMamas	 ↓	3.67
23	KFC	 ↓	2.17
24	Roman's Pizza	 ↓	2.11
25	Debonairs	 ↓	0

2022

Rank	Restaurant		Score
1	Kauai		10.5
2	Spur		8.5
3	Panarottis		8
4	Burger King		7
5	Simply Asia		7
6	Steers		5.25
7	McDonald's		4.5
8	Wimpy		4.5
9	Barcelos		4
10	Galito's		3
11	Nando's		2
12	Mochachos		2
13	Fishaways		2
14	Sausage Saloon		2
15	Pizza Hut		2
16	Chicken Licken		2
17	Ocean Basket		1.5
18	Fish & Chip Co.		1
19	Hungry Lion		1
20	RocoMamas		0
21	KFC		0
22	Roman's Pizza		0
23	Debonairs Pizza		0



LEVEL UP YOUR MEAT-FREE MONDAY MENU

100% Flavour & 0% Meat

*Quick, Easy
& Delicious*



100%
PLANT
BASED



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EVALUATION

Top 6 Evaluation

1. Kauai

Winner for 2nd year
in a row

Kauai takes the top position again this year, with a total of 18.88 points. This is unsurprising given Kauai's range of plant-based meals, as well as their ratio of plant-based meals to non-plant-based meals.

Kauai continues to make a great effort to innovate and maintain plant-based options, with their range of breakfast and main options, as well as their renowned smoothies, which were marked as desserts in the ranking. What is interesting about Kauai, relative to other fast-food chains, is that they offer health-focused options, making it easy for people who want to eat a healthy wholefood plant-based diet, but still want the convenience offered by fast-food service.

Kauai has also done well in their labelling and menu presentation aspect of the ranking by

appealing to a large audience, and not only those that follow a vegan or vegetarian diet. By naming their offerings with simple terms such as "Avo Falafel salad" and the "No Bull Burger", Kauai stays away from implying that the plant-based options are only for those that follow a plant-based diet, thus looking to attract a larger customer base. Furthermore, listing their plant-based selections interwoven with the placement of non plant-based options prompts the average consumer to choose plant-based offerings more often.

Another noteworthy aspect of the Kauai menu is that they offer free plant-based milk alternatives (oat and almond) for their drinks. In doing this, Kauai has set the example to make plant-based milk options the norm, making it easier for consumers to select such options.



Avo No-Bull Burger



Avo Falafel Salad

*Source: Kauai Instagram



Plant Peanut Butter Bomb



2. Simply Asia

Simply Asia has performed much better relative to last year, moving up several places from 5th to 2nd position with 18.32 points. This movement is reflective of the change in criteria for ranking, which removed the cap on the number of points awarded for mains. This change is also a result of lower performance by previously high ranking QSRs.

Simply Asia did well in the ranking by offering a variety of plant-based options for most meal categories listed on their menu, including Thai-inspired noodle and rice dishes, as well as sushi options. These include vegetable spring rolls and spinach dumplings for starters, a Thai Consommé for soup, a variety of plant-based stir fries under their Thai Specialities, plant-based noodle dishes and sides. The area that presents the most opportunity for

improvement is the desserts section, where Simply Asia has the opportunity to provide Thai-inspired plant-based desserts that South Africa does not regularly experience.

Simply Asia also performed well in the labelling

and menu presentation aspects of the ranking. They have integrated the plant-based options in the overall menu, targeting all consumers, as well as created a separate menu with plant-based options, thus exclusively targeting plant-based consumers as well.



Spinach Dumplings

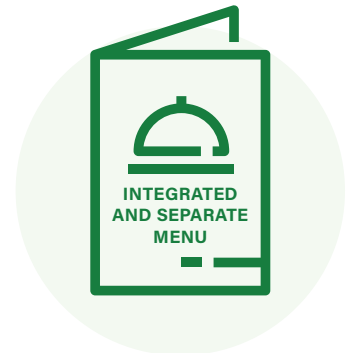


Thai Consommé



Basil & Chilli Stir Fry

**Source: Simply Asia Instagram and Facebook*



3. Panarottis

Panarottis took the 3rd position, the same as last year, with a total of 13.62 points. They are the only mainstream Italian-style food outlet to offer a wide variety of plant-based options.

Current offerings include pizza options such as the Vegan Margherita, Vegan Chicken & Mayo, Vegan Vegetarian, and Vegan Al Capone to name a few. Their pasta dishes include Vegan Arabiatta and Bolognese dishes, and light meals including a Vegan Chicken and Mushroom sub, Flatbreads, and more.

Panarottis' plant-based offerings underwent various changes throughout the year. These

include the removal of a few plant-based options and a dessert option. To their credit, Panarottis also offers free plant-based milk alternatives (almond milk) for their beverages. They have also added new plant-based options since data collection occurred, and were not counted as a result*.

The greatest opportunity for improvement involves Panarottis integrating their vegan options with the rest of their menu, which is currently offered on a separate menu. Doing so attracts a variety of consumers, opening them up to a more accessible selection of plant-based offerings.

**To Note: There have been additions to the Panarottis menu since data collection concluded. These new additions include vegan Sweet and Spicy Thikka pizza, a Crumbed Veg Stack, and a Kids Vegan Chicken Nuggets dish.*



Vegan Al Capone
Pizza



Vegan Spaghetti
Bolognese



Vegan Vegetarian Pizza

**Source: Panarottis Facebook*



4. Nando's

Nando's has ranked 4th with 10.22 points. They have taken the leap and started offering a range of plant-based dishes under the new "Great Pretender" range. The menu has almost every animal-based option available with a new meat-alternative substitute.

However, not every Great Pretender option is plant-based, with the use of cheese and non-plant-based mayonnaise in many of the dishes. Dishes that do not have any cheese or mayonnaise include: The Great Pretender Original Boujee Bowl, The Great Pretender Strips, Veg & Spicy Rice, The Great Pretender Strips & Spicy Rice, The Great Pretender Hotpot & Spicy Rice, and The Great Pretender Hotpot



The Great Pretender Boujee Bowl

& Casa Pap. Nando's still has the opportunity to provide even more plant-based options if they remove or swap their cheese and mayonnaise out for plant-based alternatives

Nando's did not do well in the labelling and menu presentation aspect of the ranking because not all the ingredients included in the Great Pretender range are listed, and Nando's treats the categories of plant-based and vegetarian interchangeably. Nando's South Africa should look to their international counterpart, Nando's UK, who clearly distinguishes the difference between vegetarian and plant-based on their online menu.

New
to the
top 6

*Source: Uber Eats

5. Burger King

Burger King South Africa Moved down to the 6th position with 9.31 points. The chain offers a variety of plant-based options, including the Vegan Royale, Vegan Nuggets, and the Plant-Based Whopper*.

Burger King South Africa has also taken a significant step in their plant-based journey, by certifying their plant-based menu items as vegan by international vegan certification body, V-Label. This means that these offerings are done with minimal cross-contamination with their non-vegan products, thus offering a seal

of credibility to their strictly vegan consumers. In a report conducted by ProVeg International, Burger King was the top-ranked plant-based fast-food chain worldwide. Burger King offers 30 plant-based main dishes out of 307 across nine countries accounted for in the report. The company has committed to making all of its menus 50% plant-based by 2030, in step with other Burger King efforts to promote plant-based eating - including opening its first plant-based location, and implementing a plant-based-by-default ordering model at a location in Austria.



Vegan Royale



Peri-Peri Vegan Royale

**To Note: There have been changes to the Burger King menu since data collection concluded. This includes the removal of the Plant-Based Whopper, and vegan nuggets. The vegan nuggets are still available as a kids option.*

6. Spur

Spur Steak Ranches has moved the most since last year, moving from 2nd to 6th place in the ranking with 9.14 points. This change is a result of the chain removing many of their plant-based options including the Beyond Burger, Bean Burger, Veg Strips & Cheese Quesadillas, Veg Friendly Nachos, and Veg Chicken Strips & Avo Salad.

The current plant-based options available at Spur include a Garden Salad, a Veggie Schnitzel and Crumbed Veggie Burger, and the 100% Plant Burger (made with soy and pea protein).

Spur remained in the top 6 partially due to their labelling and menu presentation performance. Spur did well in placing some of their plant-based options in their overall menu, thus keeping the selection open to flexitarians and anyone who might be interested in choosing a plant-based option. They also did well in making their plant-based options sound appealing, describing their plant-based options with enticing language such as: “a delicious chicken-style...; basted and grilled to perfection...; golden brown crumbed...”



Veggie Schnitzel



Crumbed Veggie Burger

*Source: Spur Steak Ranches Website

**Excellent
description of
plant-based
options**

³ (ProVeg 2022)
⁴ (Mashego 2022)



*Source: Shutterstock

OVERALL EVALUATION

Leaders and Laggards

Despite a select few chains doing quite well, the ranking suggests that the South African plant-based fast-food landscape still has plenty of potential for improvement. The top three performing chains scored much higher relative to the 4th position onwards. In the 1st position is Kauai with 18.88 points, and 2nd is Simply Asia with 18.32 points (difference of 0.56 points). Panarottis then came in 3rd with 13.62 points (difference of 4.7 points). Thereafter came Nando's in 4th place with 10.22 points (difference of 3.4 points), Burger King with 9.31 points, and Spur with 9.14 points. The scores show that the best ranking chains were captured by a relatively high performing few, with a strong drop off in performance by remaining chains.

Mains, Sides and Desserts

The ranking indicates that all types of offerings, mains, sides and desserts, can still do with more plant-based offerings for all QSRs listed in the ranking.

Main meals present the biggest opportunity for improvement, with only 14 chains including a plant-based main option, and 11 chains including no plant-based main meal option at all. At a minimum, brands that ranked 15th position onward can add at least one plant-based main option to their menu. Removing dairy products from vegetarian options can make this easily possible. Furthermore, having at least one plant-based option attracts families and groups of people which have one plant-based member, who would otherwise turn away from restaurants that cannot cater to the entire unit. Looking at sides, we see that chains tend to perform well in this category as many sides tend to be accidentally vegan. Potato related dishes, salads and side vegetables dishes make up the majority of the plant-based side offering for QSRs.

Desserts present even more of an opportunity for growth. QSRs can easily look to South African retailers and manufacturers for inspiration on dessert options. Innovative options such as ice cream-style desserts, cakes, brownies, and more are readily available across the country. Furthermore, the addition of plant-based

dessert options caters to a significant part of the South African population that suffer from lactose intolerance. QSRs can look to match this trend, and provide plant-based desserts relative to their unique set of offerings.

One of Each

What is exciting to note is that the chains in the top 6 represent one of almost every type of fast-food restaurant in South Africa. These include health-based options, Thai style food, a burger chain, a pizzeria, a chicken chain, and a steakhouse. This indicates that plant-based options complement a variety of different cuisines, and can be added to a variety of differently themed chains.

Mugg & Bean, a franchise well known for their breakfasts, have added a number of new and exciting plant-based options, but were just 1.97 points away from making it to the top 6. Mugg & Bean may have been higher up in the ranking if they had not removed some of their plant-based options (such as the Vegan Fry Up and Asian Cauliflower Bites). Given the lack of plant-based desserts available across the ranking, Mugg & Bean could be a pioneer in this space by offering plant-based versions of their famous Mugg & Bean desserts.

Ocean Basket, a fish-style chain, may benefit from incorporating more plant-based options into their menu, given how they ranked midway through all 23 chains. An easy segue into this is to offer more plant-based sushi options, and look into adopting a meat analogue fish option on the menu.

Naming the Offerings

QSRs had an opportunity to perform well in the ranking based on how attractively their offerings were named for the average consumer. In South Africa a small burger chain, Hudson's, The Burger Joint*, provides an excellent example of this. They offer a variety of plant-based options, including burgers with enticing names such as "The Frontline Worker", "The Seoul", and the "Princess and The Pea" which all have appealing descriptions. These names are optimal because

they focus on the culinary theme of the dish while avoiding the exclusivity associated with words such as "vegan" or "veggie" (e.g. vegan/veggie burger, veggie bites).

Hudson's, The Burger Joint - The Seoul



*Source: @hudsonsburgers Instagram Page

In order to present products as open to all consumers, but still have the acknowledgement that the product is plant-based, QSRs can consider using a simple logo to indicate that the product is plant-based. One way to maintain credibility with their vegan consumers is to consider adding a vegan certification, such as V-Label, which is locally available in South Africa, or look into including a "plant-based" certification label.

Meat Analogues vs Whole-Food Plant-Based

Across the board, we have seen QSRs offer a range of plant-based options that are meat-analogues usually composed of soy or pea protein. This decision is always an excellent way to speak to the flexitarian consumer on their plant-based journey, and fully plant-based consumers that enjoy such flavours without incurring the harmful impacts of eating animal-based foods.

However, restaurants can also look to incorporate a variety of wholefood plant-based options to increase their plant-based offerings on their menu. Kauai and Simply Asia do well in this regard, and offer a variety of fruit, vegetable and tofu-rich dishes that are flavoured and marketed appealingly to the average consumer.



MARKET REVIEW

Market Size

The global plant-based food market size is predicted to expand from US\$ 11.3 billion in 2023 to US\$ 35.9 billion in 2033⁵. This means a predicted 12.2% growth between 2023 and 2033. This constant growth supports the fact that going plant-based is not a fad, but rather a long-term lifestyle choice inspired by a variety of factors⁶. Rising health concerns, the climate crisis, and ethical reasons pertaining to animal welfare and food injustices associated with the global food system are some of the core reasons people are committed to going more plant-based.

As a response to this, the plant-based industry is slowly becoming a staple part of the restaurant and retail sectors, with new and improved plant-based products being created every year. However, some players in this sector can miss the mark when it comes to meeting consumer preferences, and struggle to effectively launch and ensure constant consumption of certain plant-based product ranges. Nonetheless, experts in the plant-based industry such as ProVeg offer services to assist interested stakeholders to navigate their plant-based goals.

Politics and Policies

In June of 2022, the Department of Agriculture, Land Reform and Rural Development (DALRRD) imposed a ban on "meaty" names for plant-based meat alternatives. Words such as "burger", "nugget", and "sausage" were banned for plant-based products because they were terms specifically assigned only for processed meat products under Regulation No R1283, despite the regulation specifically excluding plant-based products from its scope.

Colloquially termed the "Veggie Burger Ban", this stringent measure has been imposed in many countries around the world, and making significant headway in countries such as France and Turkey. Although the ban so far been unsuccessful in South Africa, its impact was felt by many small and large plant-based businesses

alike, with a few going out of business, and many slowing down production of their plant-based products. The uncertainty in this environment has affected South African retailers and restaurants, and has likely contributed to a slowdown in the introduction and continuance of meat analogue plant-based options in the country.

Rising Costs

Like many parts of the world, South Africa is currently experiencing a cost of living crisis, affecting consumer choices when it comes to buying food. Factors such as rising inflation, the weaker Rand, persistent load-shedding, adverse weather conditions, geopolitical unrest, and supply chain disruptions may be limiting consumer choices⁷, and be knocking on the plant-based industry as well.

Nonetheless, the consumption of fast-food remains steady and provides an opportunity for the plant-based industry. Looking at pricing in particular, this is especially true given that a number of the QSRs evaluated offer their plant-based options at a similar price to their animal-based options, even when using meat-analogue products (e.g. Nando's, Burger King, Panarottis, Steers).

QSRs can also look to work directly with plant-based food manufacturers to bring down the price of plant-based options - an area in the industry that has not yet received focused attention. Plenty of attention and investment has been given to taste, texture, healthier options, as well as product branding. Stakeholders could benefit from actively investing in bringing the cost of plant-based outputs down to improve the ease of access to such foods.

Fully Plant-Based Restaurants

Due to the growth of the plant-based lifestyle around the world, South Africa has also made strides in opening up exclusively plant-based chains that are popular amongst vegans, vegetarians and flexitarians alike. These restaurants are concentrated in the major cities

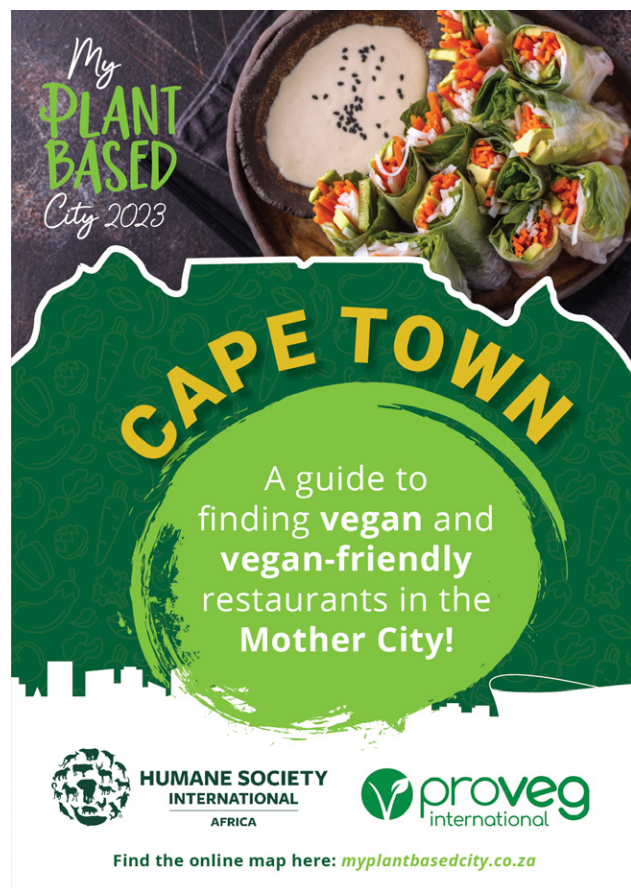
⁵ ("Plant-Based Food Market - Size, Growth, Trends, Share | 2033", n.d.)

⁶ ("Plant-based Foods Market to Hit \$162 Billion in Next Decade, Projects Bloomberg Intelligence | Press" 2021)

⁷ (Olivier, 2023)

in South Africa including Cape Town, Durban and Johannesburg.

The Cape Town Vegan, ProVeg and Humane Society International created a map (first in its series), called [My Plant-Based City](#), which showcased the top places to find vegan and vegetarian options in Cape Town.



2023 International Fast-Food Menu Ranking

In August of this year, ProVeg International published an international review of major fast-food chains with respect to their plant-based menu offerings, labelling and presentation. Five chains with international presence across various countries were selected for the review, including Burger King, Subway, McDonald's, Pizza Hut and KFC. Countries included in the ranking were areas in which ProVeg offices exist, including the United Kingdom (UK), Germany, the Netherlands, Spain, the United States of America (USA), Poland, the Czech Republic, and South Africa - countries in which there are ProVeg offices.

Overall, the report found that Burger King performed the best internationally, thereafter was Subway, in 3rd place was McDonald's, 4th place was Pizza Hut, and last in all countries was KFC.

What is interesting to note is that all of the mentioned brands have plant-based options in other countries, but not all of them have plant-based options in South Africa. South African chains can look to their international counterparts to adopt popular plant-based dishes.

The challenge with examining these international chains relative to the South African context is that the majority of them do not reflect the market share in South Africa. Aside from KFC and McDonald's, which represent 24.3% and 13% of the market in terms of sales respectively, the remaining chosen brands do not make up part of the top 5 best selling chains in South Africa.

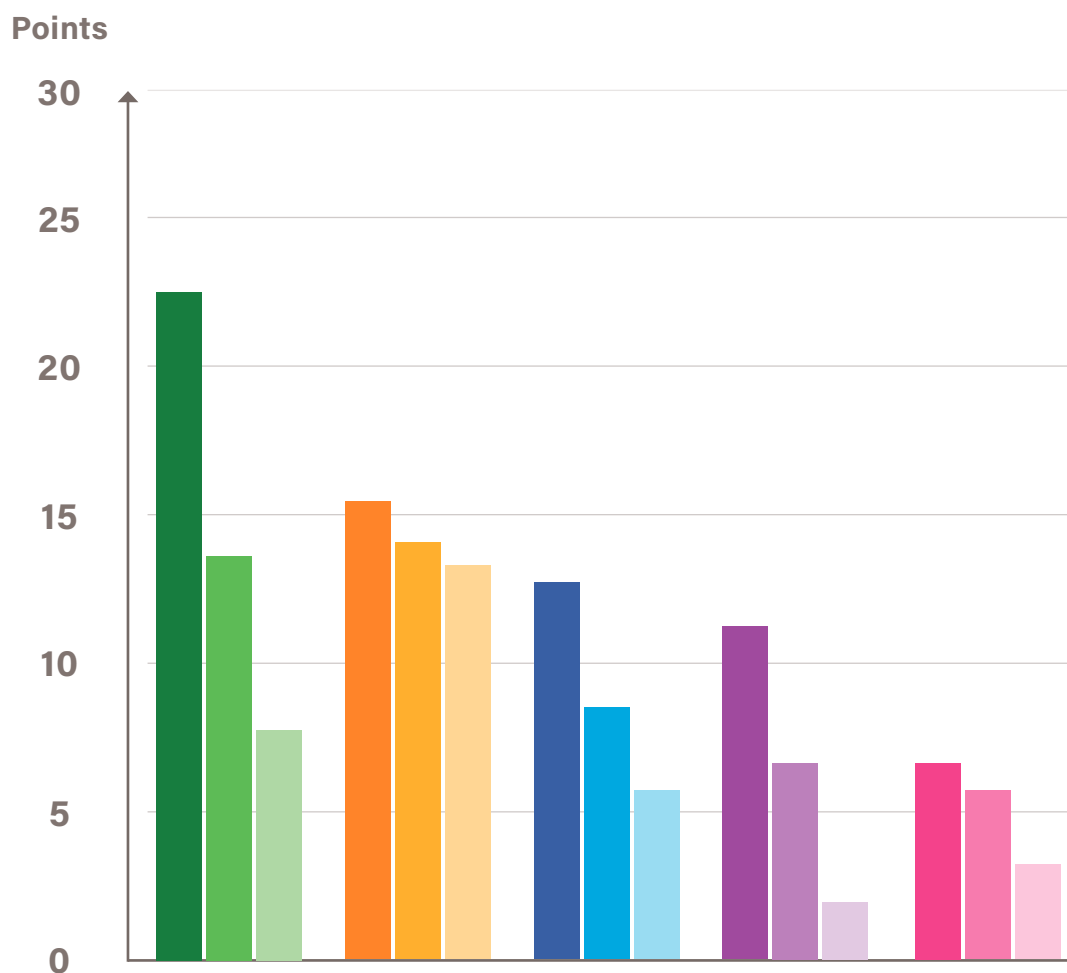
A link to the report can be found [here](#).



2023 International Fast-Food Menu Ranking Results

Points Scored For International Ranking

Please note that the scoring methodology for the international ranking and the South Africa ranking were different. For more information on the methodology and evaluation, look at the international report [here](#).



UK, Germany, South Africa
Netherlands, Spain, US
Poland, Czechia, Belgium



Netherlands, Spain, UK
Czechia, Germany
US, Poland



UK, Germany, Poland
Spain, Belgium, South Africa
Netherlands, Czechia, US



Belgium, UK, Germany
Poland, South Africa
US, Czechia



Poland, UK, Netherlands
Germany, Czechia, Spain
South Africa, Belgium, US

OPPORTUNITIES

It is clear that the plant-based market is expected to grow over the next ten years, and that fast-food chains recognise this shift. However, restaurants may not know how to best take advantage of this opportunity, and may need deeper insight into the sector before taking the leap. QSRs can look to consulting experts, like ProVeg South Africa, who are well positioned to provide tailored insights into the plant-based sector due to their understanding of the plant-based consumer in South Africa. Nonetheless, there are some general areas of development fast-food chains can look into when developing their plant-based dishes, as explored below.

Local Manufacturers

There are a variety of world-class local manufacturers in the plant-based space that can assist QSRs in making more plant-based options. Ideally, these brands need to have a national presence to match the reach major QSRs have in South Africa. Many chains such as Panarottis, Spur, Steers, and Nando's are taking advantage of this, and make multiple dishes that are easy to switch with plant-based meat analogues.

However, QSRs need to bear in mind that the proliferation of meat analogues available means that they need to be strategic when choosing products that are best tailored to their style and flavour profiles. QSRs can also innovate and create their own meat analogue options tailored to their specific flavour profiles.

Desserts

Across the board, the ranking shows that there is a lack of plant-based desserts, with only 2 of the 25 assessed chains offering plant-based options. In the past some chains have offered plant-based desserts that lack appeal and an understanding of the consumers that want these options. This indicates that QSRs may be assuming what consumers interested in eating plant-based food want, without doing the necessary research, or speaking to plant-based consumer experts. There is an abundance

of plant-based dessert options available in retailers, and with the guidance of a number of South African plant-based chefs and experts in the industry.

Menu Development



The report frequently touches on how QSRs can adjust their menu to encourage selection of their plant-based offerings. Although QSRs may need specific suggestions on how to improve their menu, listed below are some general pointers that should be incorporated to boost plant-based consumption:



Focus on the culinary theme when naming offerings to describe the inspiration, culture or flavour profiles of the dish as opposed to using generic terms such as "veggie" or "plant" etc. For example "The Frontline Worker" vs "Vegan Burger"



Use enticing language when describing the offerings



Place plant-based offerings alongside non plant-based offerings and list them first



Have at least one plant-based main option



Advertising

There have been a number of QSRs that have had soft launches of their plant-based offerings, with minimal advertising being done to publicise such offerings. It appears that advertising of new products is limited to simple indicators on a menu that shy away from celebrating any new plant-based editions.

Motivations behind little marketing are driven by perceptions of consumer behaviour without prior research. QSRs may be concerned that advertising the fact that they have plant-based options may drive away their average omnivorous consumer, or may be perceived negatively by the general public. Given that vegans and vegetarians make up to less than 3% of the South African population⁸, restaurants may believe that the return on investment for advertising may not be fruitful.

This type of prudent thinking is keeping potential customers away from trying new options, which result in low sales and offerings eventually being taken off the menu. QSRs need to keep in mind that they are targeting flexitarians and omnivores that may be curious about trying plant-based as well. Furthermore, groups of customers may be turning away from choosing a chain if one or two of their cohort follows a more plant-based friendly diet, believing that their restaurant of choice may not have options that speak to everyone in the group. Another factor to take into account is that having even a small percentage of vegan or vegetarian consumers aware of a QSRs plant-based offering goes a long way. Such consumers are usually quite enthusiastic about plant-based food, and can often serve as ambassadors, providing free marketing for QSRs actively participating in the plant-based space.

CONCLUSION

QSRs in South Africa have the opportunity to signal to consumers that they are progressive and in keeping with current lifestyle shifts by including more plant-based options to their offering. By adding more appealing plant-based options to their menus, fast-food chains attract diverse segments of the market (not solely plant-based consumers), as well as groups of consumers who turn away from chains that do not cater to their entire unit.

⁸ (Nielsen and Unilever 2022)



Image Credit: On The Green Side by Versi Creative

Effectively making use of this market shift is essential to maximising and creating opportunities offered by the plant-based space. To better maximise opportunities presented by this industry, it is essential for QSRs to collaborate with industry experts, and to focus approaches to their plant-based visions, thus seizing the opportunity to set the tone for the industry across South Africa.

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ACKNOWLEDGEMENTS

- Anusha Lakha - Researcher
- Wikus Engelbrecht - Editor
- Donovan Will - Country Director
- Design - Sharon van der Schyff, Pixelpig

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PROVEG SOUTH AFRICA

About Us

ProVeg South Africa is the non-profit chapter South African of ProVeg International, an international food awareness organisation working to transform the global food system by replacing conventional animal products with plant-based and cultivated alternatives.

ProVeg works with international decision making bodies, governments, food producers, investors, the media, and the public to help the world transition to a society that is less dependent on animal agriculture and more sustainable for humans, animals, and our planet.

What we do

Corporate Engagement Services

Consulting & Expert Sessions | Menu Development | New Product Development | Canteen Training | Staff Education

Communications

PR | Social Media: 44 000 + followers | Newsletter: 20 000 subscribers

Veggie Challenge

The Veggie Challenge is a 30 day challenge that encourages participants to eat more plant-based for 30 days. Signing up provides free recipes, tips and support. | Sponsorship Opportunities

Campaigns

Veganuary | World Plant-Milk Day | Meatless May | World Vegan Month | Activations and Events | Awareness Events | Expos

International Support

ProVeg International Incubator | New Food Forum



V-Label

Across the globe, more than **50,000** products from more than **4,300** licensees now carry the V-Label.

V-Label is an internationally recognised, registered seal for labelling vegan products and services established in Switzerland in 1996. Now in South Africa, the certification body offers an international standard for a vegan certification at local rates.

For more information contact za@v-label.com



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THE V-LABEL PROCESS:

1. **Query:** In an initial inquiry, you provide relevant information about your company.
2. **Offer:** Based on the information provided in your query, we create an initial offer.
3. **Contract:** After terms are agreed upon, we will enter into a license agreement contract.
4. **Inspection:** Once we receive the V-Label checking form, the product review begins. The process can take anywhere between 2 weeks - 1 month depending on the amount of products being reviewed.
5. **License:** After successful verification of the product specifications, you will receive the V-Label license.

