

CAFÉ, RESTAURANT & CATERING

Retail Trade data

The Australian Bureau of Statistics (ABS) 8501.0 Retail Trade data provides monthly industry turnover data for the Café, Restaurant & Catering services sector. The Café, Restaurant and Catering sector is the largest contributor and subgroup of this sector. A breakdown of key trends – both for the café, restaurant and catering subsector and total industry turnover (including takeaway sales) are highlighted below for the Month and Year Ending November 2018.

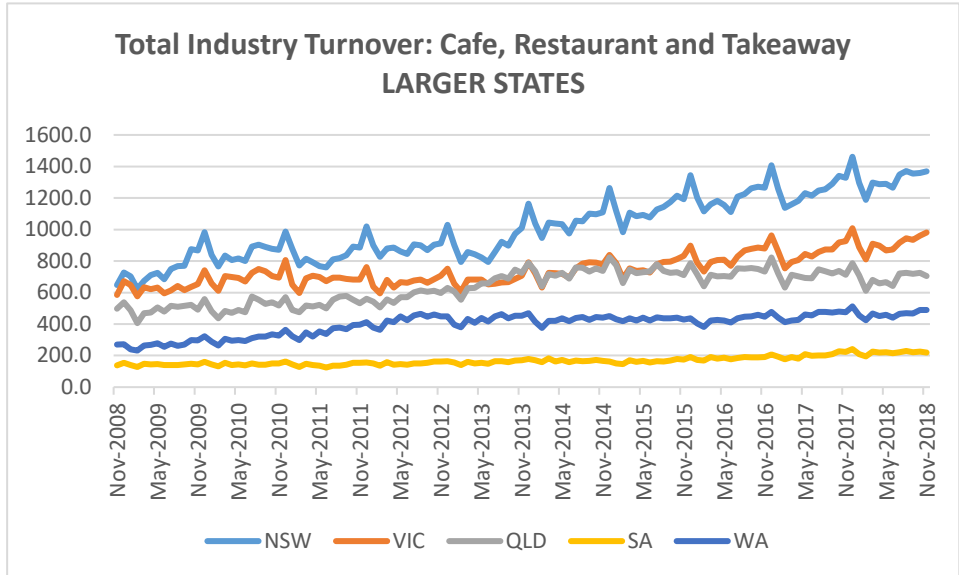
Turnover in the Café, Restaurant & Catering Industry							
State	Sector	Month of November			Year Ending November		
		Nov 17 (\$M)	Nov 18 (\$M)	% Change MoM	Nov 17 (\$M)	Nov 18 (\$M)	% Change YoY
NSW	Café, Restaurant & Catering Services	771.9	792.5	2.7%	8499.3	9172.1	7.9%
	Café, Restaurant & Takeaway Services	1327.5	1368.6	3.1%	15152.1	15886.9	4.8%
VIC	Café, Restaurant & Catering Services	576.0	626.8	8.8%	6520.2	6921.2	6.2%
	Café, Restaurant & Takeaway Services	925.7	981.8	6.1%	10426.3	10989.3	5.4%
QLD	Café, Restaurant & Catering Services	395.1	386.3	-2.2%	4875.7	4595.1	-5.8%
	Café, Restaurant & Takeaway Services	712.9	705.2	-1.1%	8588.7	8348.8	-2.8%
SA	Café, Restaurant & Catering Services	126.1	126.5	0.3%	1355.9	1528.1	12.7%
	Café, Restaurant & Takeaway Services	222.4	218.9	-1.6%	2448.1	2643.2	8.0%
WA	Café, Restaurant & Catering Services	293.9	306.0	4.1%	3495.2	3491.4	-0.1%
	Café, Restaurant & Takeaway Services	476.0	489.7	2.9%	5543.8	5590.0	0.8%
TAS	Café, Restaurant & Catering Services	28.0	32.5	16.1%	328.9	347.6	5.7%
	Café, Restaurant & Takeaway Services	57.9	61.4	6.0%	677.9	696.4	2.7%
NT	Café, Restaurant & Catering Services	21.4	18.5	-13.6%	246.8	244.0	-1.1%
	Café, Restaurant & Takeaway Services	39.7	37.2	-6.3%	467.4	470.7	0.7%
ACT	Café, Restaurant & Catering Services	40.9	44.0	7.6%	495.8	489.7	-1.2%
	Café, Restaurant & Takeaway Services	66.0	71.6	8.5%	791.9	801.4	1.2%
Total	Café, Restaurant & Catering Services	2253.4	2333.2	3.5%	25817.7	26789.6	3.8%
	Café, Restaurant & Takeaway Services	3828.1	3934.2	2.8%	44096.3	45426.8	3.0%

Source: ABS 8501.0 Retail Trade, Australia; State by Industry Subgroup, Original

Analysis

The café, restaurant and catering sector experienced growth of 3.8 per cent for the Year Ending (YE) November 2018 recording turnover of \$26.8 billion. Total industry turnover (including takeaway sales) for the YE November 2018 was \$45.4 billion, representing Year on Year (YoY) growth of 3.0 per cent. For the month of November 2018, turnover recorded in the café, restaurant and catering sector was \$2.3 billion, a 3.5 per cent increase compared to the month of November 2017. When including takeaway sales, total industry turnover recorded during the month of November 2018 was \$3.9 billion, which represented growth of 2.8 per cent. Month on Month (MoM) growth in the café, restaurant and catering sector was also recorded in New South Wales, Victoria, South Australia, Western Australia, Tasmania and the Australian Capital Territory. Declines in monthly turnover however were recorded in Queensland and the Northern Territory.

Out of all Australian states and territories, South Australia experienced the largest overall YoY growth in the café, restaurant and catering sector of 12.7 per cent. This was despite a relatively weak November which only resulted in 0.3 per cent growth for the café, restaurant and catering sector and a small decline of 1.6 per cent for the café, restaurant and takeaway sector.



Among the larger states, New South Wales and Victoria both recorded positive MoM and YoY increases, with NSW recording 7.9 per cent YoY growth in the café, restaurant and catering sector. Victoria's café, restaurant and catering sector also saw strong YoY growth of 6.2 per cent, with total industry turnover (including takeaway sales) just under \$11 billion. Queensland however experienced a YoY decrease of 5.8 per cent for the café, restaurant and catering sector. Queensland's overall industry turnover when including takeaway sales was \$8.3 billion, a contraction of 2.8 per cent over the previous 12 months. Western Australia's café, restaurant and catering sector experienced a stronger November this year, however industry turnover remained almost unchanged over the year at \$3.5 billion.

The Northern Territory recorded negative MoM growth of 13.6 per cent in the café, restaurant and catering, however turnover was only down 1.1 per cent at \$244 million. The ACT had a particularly strong November compared to 2017 across both sectors, with MoM growth of 7.6 per cent for the café, restaurant and catering sector and 8.5 per cent for the café, restaurant and takeaway sector. Despite a strong month, YoY growth in the ACT for the café, restaurant and catering sector was slightly down (1.2 per cent) for a total turnover of \$490 million.

