OH FOOD

National eating out-of-home trends and best rated brands 2020

A VERDE initiative

December 2020

Foreword

By Venna Pavaday, Co-Founder & Partner

It is a pleasure to introduce the OH FOOD 2020 report. OH FOOD is a national initiative undertaken by VERDE. This initiative stems from the changing lifestyle which we have witnessed over the last 20 years. We have always been a pioneering business, with one eye firmly on the future, and so are delighted to have had the opportunity to produce this study exploring the trends shaping the eating-out-of-home market.

The businesses and companies driving the dynamic, out-of-home food market face opportunity and threat in equal measure. Following an eating-out revolution over the past 20 years, the market has been through a sustained growth, albeit hiccups through short recessionary periods. COVID-19 and the year 2020 have however had repercussions on many businesses. In a report titled Covid 19 – Perspectives and Emerging Trends released by VERDE in May of this year, many survey respondents ranked eating-out-of-home as their least preferred propensity to spend. Quoted from the report: 'Out-of-home eating will probably be the among the most hit with an overall score of -179, with 42% of survey respondents citing that they will significantly reduce their spend on eating out, as going to crowded places and hygiene are amongst the top rated concerns of people. As stay-at-home measures continue, many consumers have not waited for restaurants to open again. Consumers have been ordering online and are more likely to continue to order food from restaurants. As revealed in wave 1 of the VERDE survey, some 30% of the population have tried online grocery shopping, even if hurdles still persist in delivery service."

Being COVID free for quite some time now has surely boosted consumer confidence, but the impact on the year's business is estimated to have been quite considerable. The segment nonetheless remains competitive, as entrepreneurs and start-ups compete with the more established players and corporates, to meet the seemingly endless appetite of the Mauritian public to try new eating-out formats and experiences. The landscape and the burgeoning shopping/eating places, today provides opportunities for new brands to penetrate the market and to establish themselves. As a strategic research and corporate finance advisor to some of those businesses, we believe that it is an absolutely central part of our role that we join, and help inform the debate on the key trends, opportunities and challenges that will shape the market's future.

We see it as our responsibility to contribute to the market's understanding of its customers, and to help operating companies meet the constant requirements for on-going and up-to-date research, in what is an ever-changing and dynamic consumer environment. This report is not about hard market data or output numbers, such as revenues, or transactional figures from restaurants, pubs or cafes. It is based on an on-going survey of more than 3,400 respondents, exploring when, where, how and why they go out to eat.

The insights and findings will inform debate and decision making within businesses while also providing best rated eating-out-of-home brands of 2020.

By Dirish K. Noonaram, Co-Founder & Partner

Eating-out-of-home is a real melting pot. Crowd pullers and buoyant experiences surround the many shopping malls, street food, and other places. Those places show to us the full range of economic, demographic, social and cultural differences. Further, because the sector is based on discretionary behaviour and discretionary spend, it so often provides early signals of emerging trends that later become mainstream.

Consumers feel less and less constrained in their behaviour by traditional norms of time, place and social status. Nowhere is this trend more apparent than in the eating-out-of-home segment. Today people now expect to eat out any time, any place, anywhere. We all know that today's consumers are increasingly demanding, expecting both food and service quality to be faultless and tailored to their own individual needs. From VERDE's multiple research studies and our firm views on the sector, we see four key pillars to the eating-out-of-home market: time, place, propensity to spend and mobile devices.

Time: People go out to eat at any point of time with no set constraints.

Place: Food is available everywhere at difference prices and with a wide variety.

Propensity to spend: People are now used to eating out and spending money on food is common.

Mobile devices: People can now find new places, check ratings, go to new places, order online and action many other practical things, which make eating-out-of-home the more likely.

Overall, the pillars are underpinned by long-term improvements in the general standard of living, the development of a consumer culture, and the growing importance that consumers place on experiences and experience-led activities – the so-called experience economy.

This report is based on primary research from interviews exploring lifestyles, regular routines and habits, plus their relationship with food and eating-out. Interviewees were drawn in a random manner and are a nationally-representative group, meaning that they reflect the make-up of the nation, based on gender, age, geographical location and socio-demographical grouping. The interviews were conducted in face to face and online, over a period of five months.

At a glance

44.8% go out a few times a month for dinner. Lunch was second ranked with 21.2% of respondents citing a few times a month.

Over 30% of people eat outside of normal times

79% of respondents citing that they ate out in the past 7 days

The eating out-of-home sector is estimated at around MUR 4.5bn per annum

The highest spending bracket for eating out-of-home is between Rs 1,000 and Rs 2,000 for close to 32% of the respondents

43.3% of the population spend more than Rs 2,000 per month of eating out-of-home

Close to 4% of the population spend above Rs 5,000 per month on eating out-of-home

41.2% of respondents cited consuming slightly more out-of-home food as compared to few years back

43.7% of people mention being passionately interested and totally adventurous regarding experiences around food

26.1% treat their family or partner to a meal on pay day, 12.4% of people treat themselves to a nice lunch and 22.1% treat their partner or family members to a take-away dinner

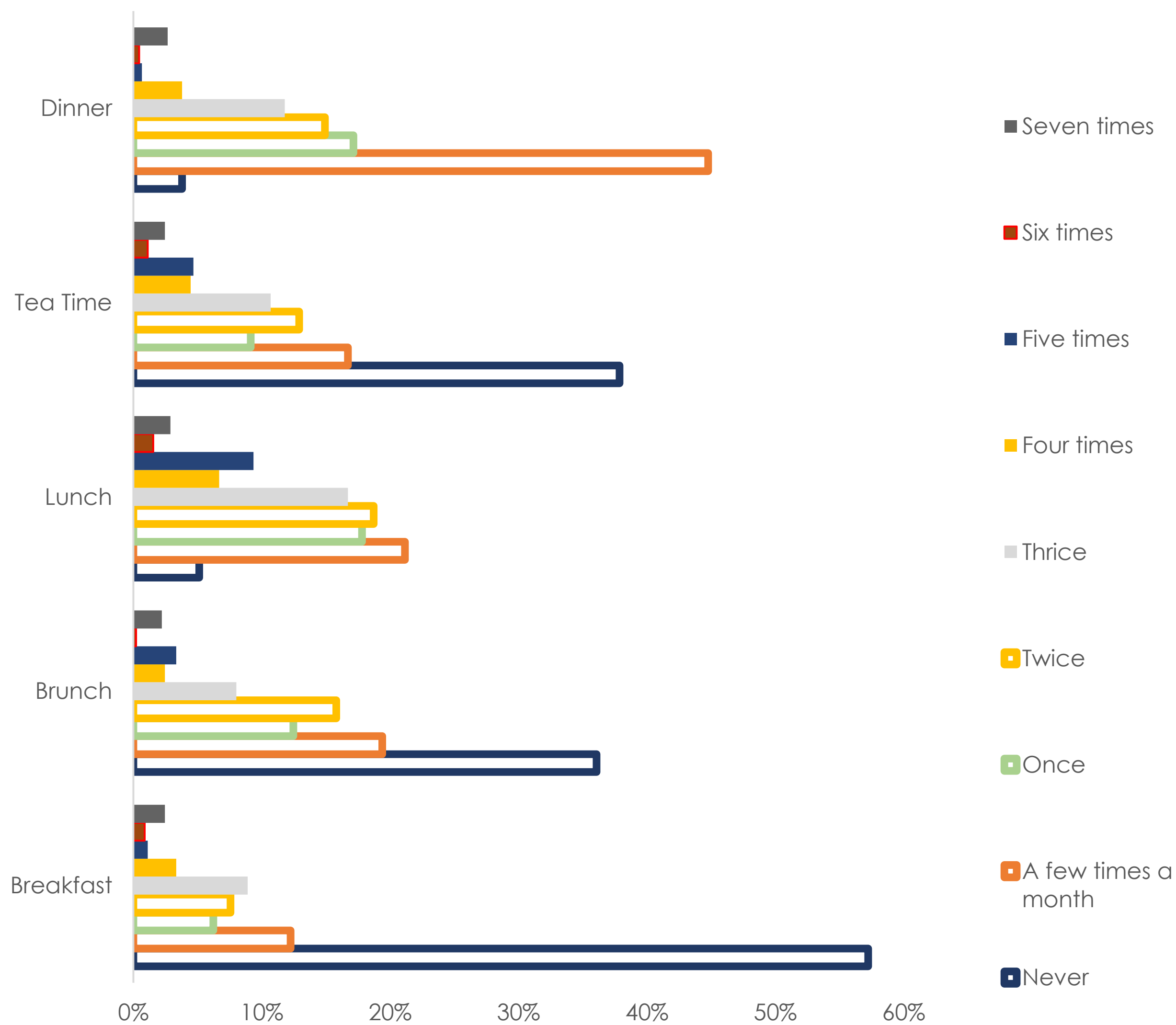
Frustrations regarding out-of-home: Waiting for food to arrive' scored 57 on 100 and was the highest rated, followed by 'Waiting for a table' at 40.5 and 'Waiting to place your order' at 30.7

Best Brands of 2020 by category

Category	Top 3 Brands 2020	Challenger Brands 2020
Boulettes	#1 Ah Kong #2 Canelo #3 Boulettes Palace	Ti rouge snack Jim Boulettes
Bol Renverser	#1 Sen & Ken #2 Taste of Asia #3 Comlone Restaurant	Al-Waseelah CHOPWOK Restaurant
Briyani	#1 Star Deg #2 Briani Deg D'or #3 Sherab & Sons- Briani House	Le ravinale Pyramid Briani
Burgers and Grills	#1 KFC #2 McDonald's #3 Elizabeth Burger and Grill	Ricardo's Fast Food Tipo Grill
Roti and Dal Puri	#1 Dewa Dholl Puri #2 Roti Aka #3 Chapeau la paille	Dholl Puri Béré Ramsahye Maraz
Kebab	#1 Gloria Fast Food #2 DILS #3 Sen & Ken	Happy Chick'n Amigos Barrack Snack
Mine bouillie	#1 Sen & Ken #2 Taste of Asia #3 L'oasis Boulettes	Ni Hao Go Yuyu
Mine Frite	#1 Sen & Ken #2 Taste of Asia #3 Hong Kong palace	Ti Tonton Singer snack
Riz Frite	#1 Sen & Ken #2 Taste of Asia #3 Comlone restaurant	3J's Family Restaurant Snack Chan Kong

The rise of the eating out-of-home phenomenon in Mauritius is similar to developed countries

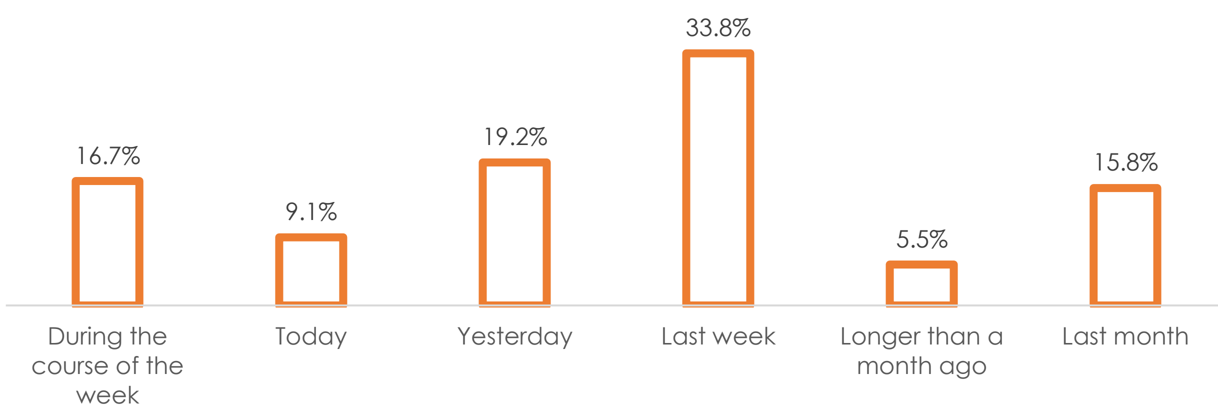
44.8% go out a few times a month for dinner. Lunch was second ranked with 21.2% of respondents citing a few times a month. Breakfast, Brunch and tea time obtained the highest percentage for Never, with some 12% to 21% of respondents stating that they go out at these times.



How many times per week people eat out by category?

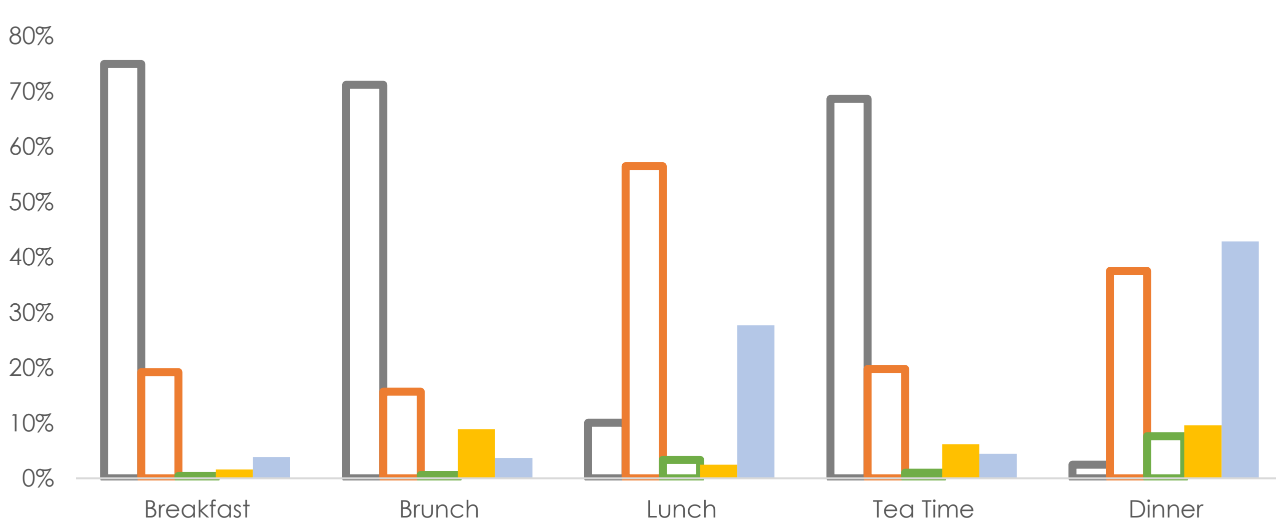
People usually eat in normal times. Nonetheless, it was noted that over 30% of people eat outside of normal times. Flexible working hours, which is expected to be more prominent in the work environment locally shall also play a key role in providing business opportunities outside normal eating times.

The nation is today an out-of-home eating one with close to 79% of respondents citing that they ate out in the past 7 days (combined for During the course of the week, today, yesterday and last week).



Dinner is when people allocate the most time, with 42.9% citing 30 minutes to one hour, 9.6% citing 'I have time so it does not matter' and 7.6% citing 1 to 2 hours. Breakfast, Brunch and Tea-Time are the meals to which people allocate the least amount of time. Rapid lunches remain strong and is a key parameter for food service businesses to consider.

How long do you usually take for the following during the weekends?



There seems to be evidence that socio-economic factors are influencing eating out trends. What are the opportunities to meet the needs of distinct categories of consumers which are on the rise, like Start-ups and entrepreneurs who are on work from home models and who use cafes and lounges to meet clients and work?

Overall, unpredictability is an important feature of the market. New entrants are today finding niche clientele and that suggests further opportunities for eating-out players, given the inevitable impact on household routines and forward planning.

Elements of interest to foodservice operators: family breakfasts in the morning and family meals in the middle of the afternoon. The potential of the latter does of course depend on the dynamics of location as parents picking up kids after school usually go to eating out places. The trend in new generational patterns is also reflected in the number of people who are now eating outside the traditional mealtime windows as will be more-fully provided in the report.

We estimate the eating out-of-home sector to be around MUR 4.5bn per annum with contemporary Mauritian food culture well established

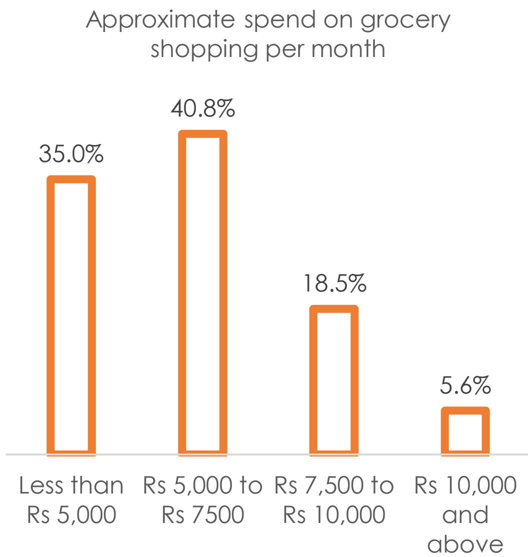
The importance of the eating out market to contemporary culture cannot be adequately captured by simple reference to the amounts of time and money dedicated to eating-out. Decisions around the sourcing, purchasing and consumption of food and drink tell us a huge amount about individuals and households, but they also speak to the wider social and cultural backdrop. We estimate the turnover in the eating out-of-home market to be as follows;

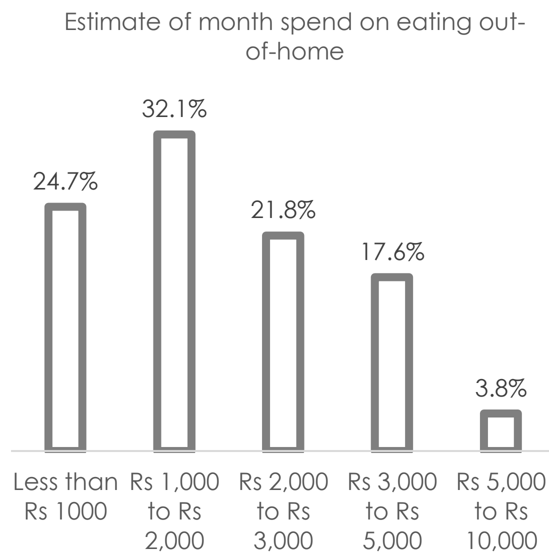
	Category	Estimated Number of Businesses	Estimated Turnover per annum (e 2019)
1	Formal eating out-of-home market	+1,850	MUR 3.9bn
2	Informal eating out-of-home market	+3,400	MUR 0.6bn
Eating out-of-home market			MUR 4.5bn

It is interesting to look at the demographics of pay in the country, to better understand the landscape. The table below provides data on income in Mauritius based on official figures, publicly available.

Income categorization (monthly personal income in Rs)	% of workforce	Estimates	% out of total Income generated in the country
Less than 15,000	45.60%	250,800	20.6%
15,001 to 25,000	28.40%	156,200	25.2%
25,001 to 50,000	18.90%	103,950	29.4%
50,001 and above	7%	38,500	24.9%

We note that only some 40,000 people earn more than MUR 50,001 per month out of a total workforce of 550,000, representing 7% of total. These 40,000 people in total, earn 24.9% of the total income generated in the country. Those statistics have been used in the below survey data to make inferences in contemporary Mauritian culture towards eating out-of-home.

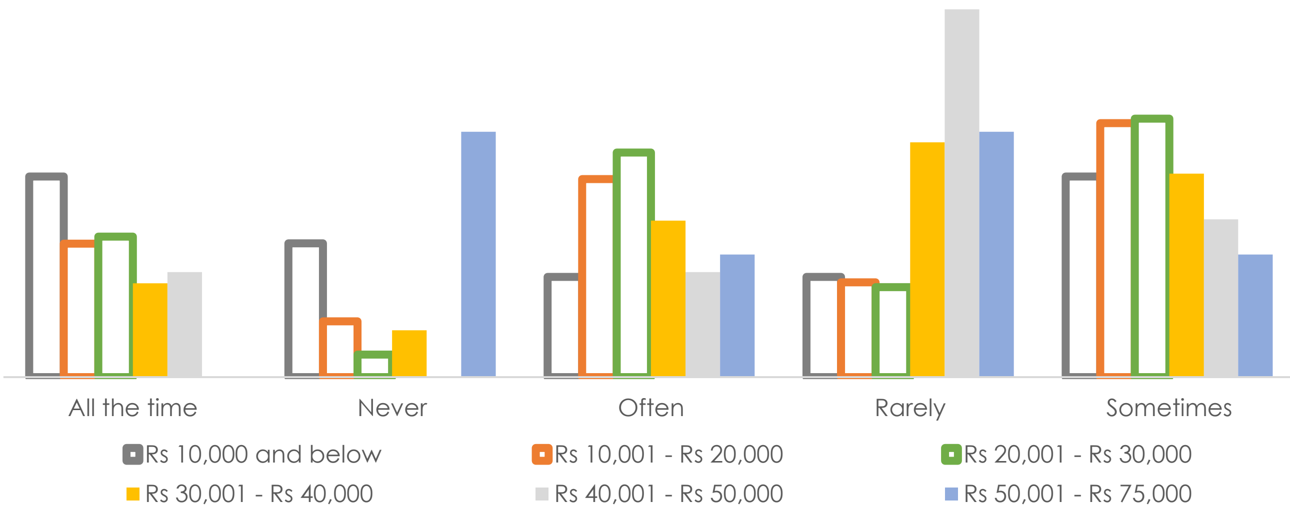




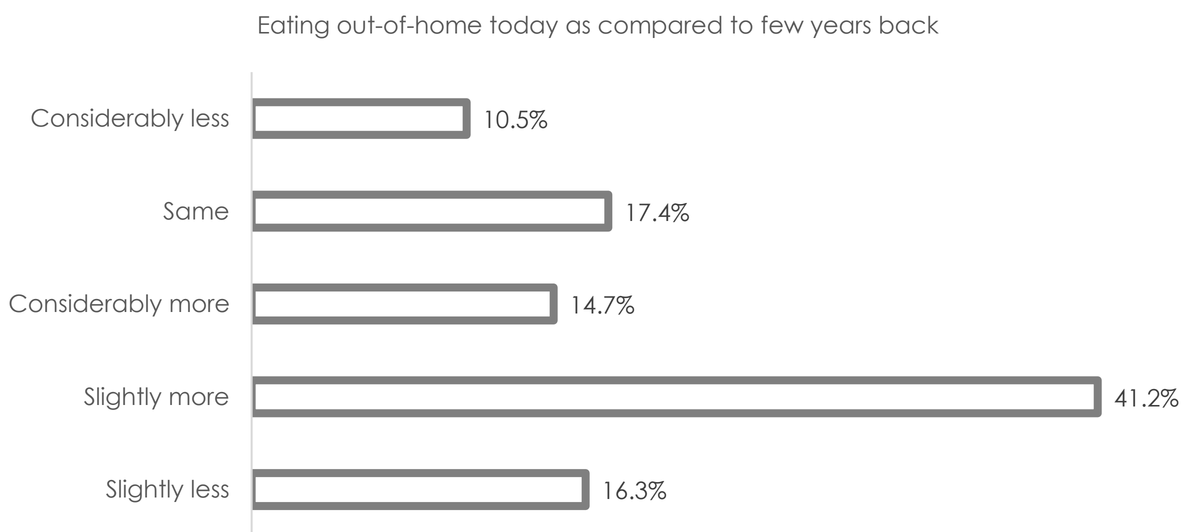
It is estimated that 35% of the respondents spend less than Rs 5,000 on grocery shopping per month, while close to 40.8% spend between Rs 5,000 and Rs 7,500, which is the spending bracket the most pronounced. 5.6% of the respondents spend above Rs 10,000 per month. Mapping the grocery monthly spend on the monthly eating out-oh-home spend is not an exact science. However, few inferences may be drawn based on data at hand. The highest spending bracket for eating out-of-home is between Rs 1,000 and Rs 2,000 for close to 32% of the respondents. 43.3% of the population spend more than Rs 2,000 per month of eating out-of-home. Close to 4% of the population spend above Rs 5,000 per month on eating out-of-home. Roughly this percentage is close to the 7% of earners which fall in the above Rs 50,000 per month bracket.

Taking a meal from your home to your place of work and differences by income

It is observed that for people earning less than MUR 30,000 per month, the percentages relating to taking a meal to their place of work across the categories All the time, Often and Sometimes, remain higher when compared to Never and Rarely. As the income threshold increases, the notion of taking home made meals to the workplace decreases, which explains a negative correlation. More than a third of people earning above Rs 50,000 never take home made food to the workplace.


All the time
Never
Often
Rarely
Sometimes
Rs 10,000 and below
Rs 10,001 - Rs 20,000
Rs 20,001 - Rs 30,000
Rs 30,001 - Rs 40,000
Rs 40,001 - Rs 50,000
Rs 50,001 - Rs 75,000

Eating out of home market has enhanced the experience economy and people strive for social currency through new culture



There are rising, and varied, expectations from consumers in the food and drink arena. We took the initiative of researching this segment as from 2020, and this research will exist as an annual edition, published every December. 41.2% of respondents cited consuming slightly more out-of-home food as compared to few years back. There is 14.7% of people who have cited considerably more, making this segment probably the fastest growing in the country. While 16.3% of people have mentioned consuming slightly less and 10.5% considerably less, these figures reflect a category of people who are becoming health conscious or are gradually moving out of the out-of-home phenomenon. However, with the different generational shifts, there is more of those adopting out-of-home than those rejecting out-of-home eating.

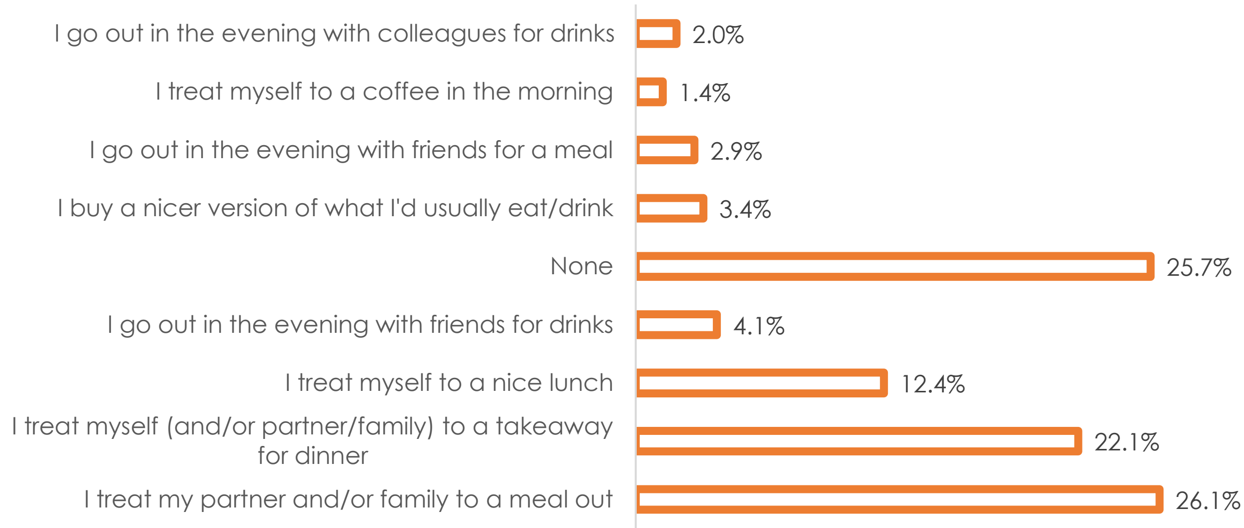
Today, consumers are far more comfortable in moving between segments than ever before. They may take one meal at a kiosk or street food stall, the next at a quick service restaurant, another at a casual dining outlet, and still consume meals at a full-service venue or at a fine dining destination. This behaviour is an essential component of today's market, and it offers opportunities for those brands and outlets who can navigate this new 'market map' effectively, often by understanding and targeting the occasions or contexts driving the appeal of different offers. The eating out market is also perfectly positioned to exploit today's relative shift in consumer priorities away from material goods and toward enriched experiences. The dubbed experience economy.

I go when I am invited somewhere	18.7%
I am passionately interested (I like good food " I like to have an outdoor experience with friends/family " I try new places" I look for good places but will not pay for very expensive food)	32.1%
I am purely functional (I go out because I am hungry - I do not have time to cook ' I find a well-priced restaurant)	34.5%
I am totally adventurous (I look for new places " Will travel long distances " Will take risks on new food - do not mind paying for what I think can be a good experience)	11.6%
I am not interested in food	3.1%

In our primary research, we asked respondents to rate their relationship with food and drink on a scale from purely functional to passionately interested and their degree of adventurousness on a scale from not at all (stick to what I know) to totally adventurous (love to try new things). Today, there is an estimated 32% of people who live the social currency of outdoor experiences and remain passionately interested in eating good food. The importance of social currency is highlighted when we ask people about their self-perceptions. The overall results remain instructive and also thought provoking with 43.7% of people being today passionately interested and totally adventurous regarding experiences around food. This is the intangible social currency which people are today looking for.

Typical pay day behaviours appear to be a way of consumers giving themselves small rewards, something smart foodservice and bar operators can plan for and take advantage of. Family treats, whether a meal out or a take-away at home were the number one choices across all respondents, but personal treats are also important for many. We have also seen the positive role of eating out for family life and all this confirms our central premise that food and drink are at the heart of Mauritian consumer culture today.

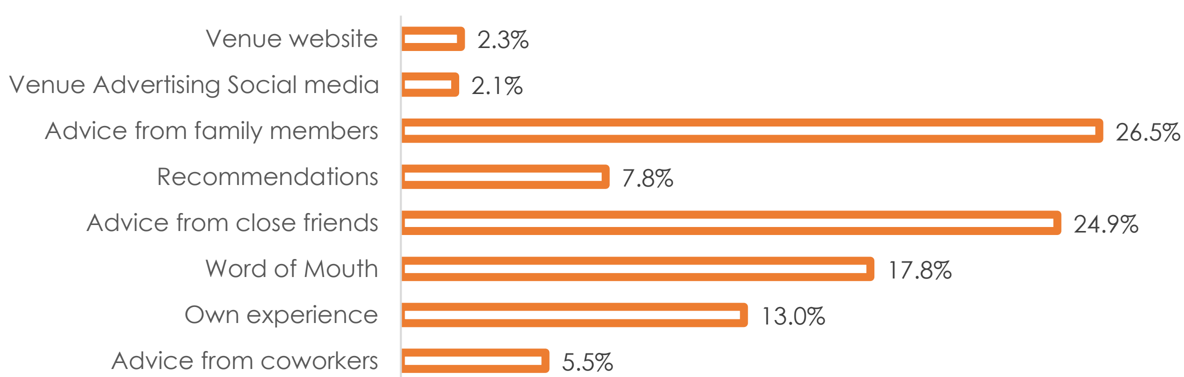
Our data reveals that 26.1% treat their family or partner to a meal on pay day, 12.4% of people treat themselves to a nice lunch and 22.1% treat their partner or family members to a take-away dinner.


I go out in the evening with colleagues for drinks
2.0%
I treat myself to a coffee in the morning
1.4%
I go out in the evening with friends for a meal
2.9%
I buy a nicer version of what I'd usually eat/drink
3.4%
None
25.7%
I go out in the evening with friends for drinks
4.1%
I treat myself to a nice lunch
12.4%
I treat myself (and/or partner/family) to a takeaway for dinner
22.1%
I treat my partner and/or family to a meal out
26.1%

The rise of the more demanding eating out-of-home consumer

While experiences play a key role in consumer behaviour, familiarity remains integral to Mauritians. The highest score from respondents pertained to 'I eat at a place I am familiar with' at a score of 73.5 on 100. This offers key opportunities for owners of food outlets to retain customers and develop loyalty. This concept could be key to new entrants looking to establish themselves in the market. Integrating technology, especially with mobile applications and reward systems could be one of the upcoming differentiators in the marketplace. Second highest score was for 'I go where the food is best', which is less than the highest score criteria by close to 50%. As we observed in the previous section, the 'adventurous consumer' again comes to the forefront as a 32.0 score is noted in the 'I try new places and new types of cuisines'.

To further analyse the important element of 'familiarity', we inquired from respondents the key criteria they consider before choosing a restaurant. Referrals and advice from family and friends accounted for close to 50% of whether the dynamics of eating out-of-home actually work. Word of mouth also obtained a high percentage of 17.8%, inferring that service and hospitality triggers feedback for returning and new customers.

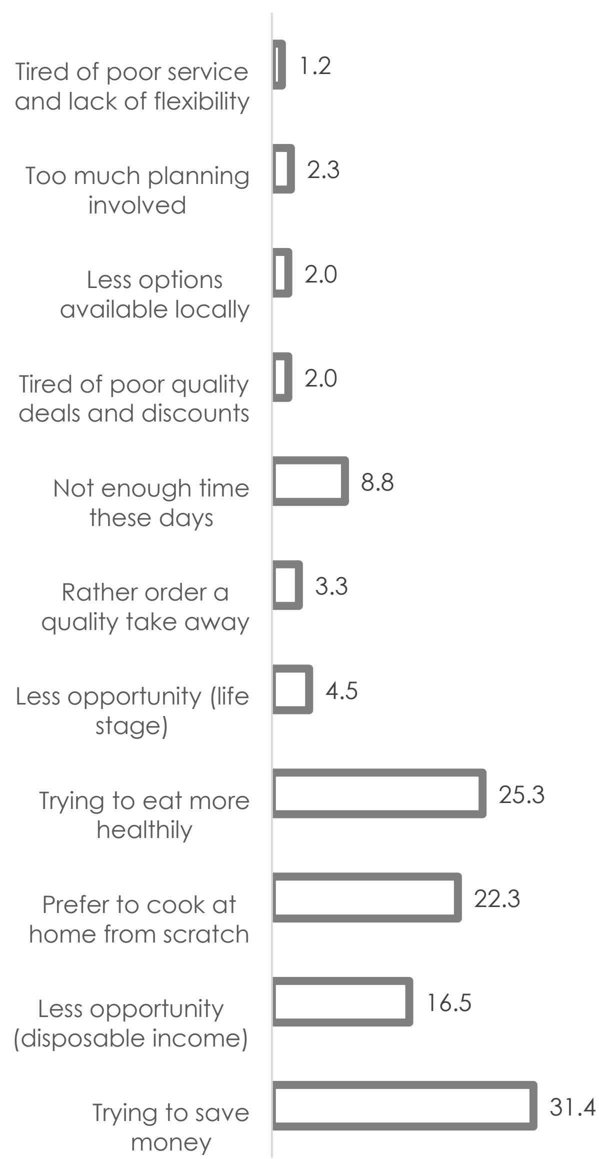


The main reasons we observed for more people going out to eat is that people have more money available to spend on discretionary activities and also affordable eating out options. This reflects the overall growth of the eating out sector, and especially the growth in the range of outlets serving food and drink at a reasonable price – (charging between Rs 150 to Rs 200 per meal).

The next most popular reason as revealed through survey data is the opportunity that eating out-of-home affords to spend proper time with the family. It is striking to see how eating out-of-home can be just as important as the traditional dining together at home so valued by the believers of the cultural heritage that family ties and closeness that the country is so recognized for. In fact, for many families, their home today is such a busy environment, cluttered by consumer technologies and individual digital or mobile activities, that the easiest way to get the modern family together for a meal is to take them all out to eat.

All those eating out **MORE** - Top 3 reasons why

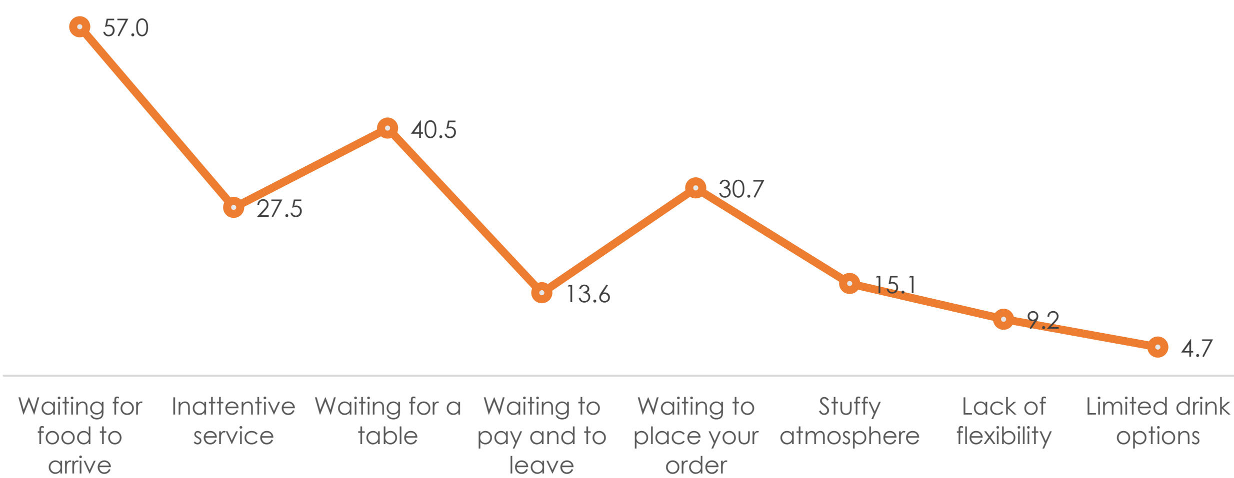
All those eating out **LESS** - Top 3 reasons why



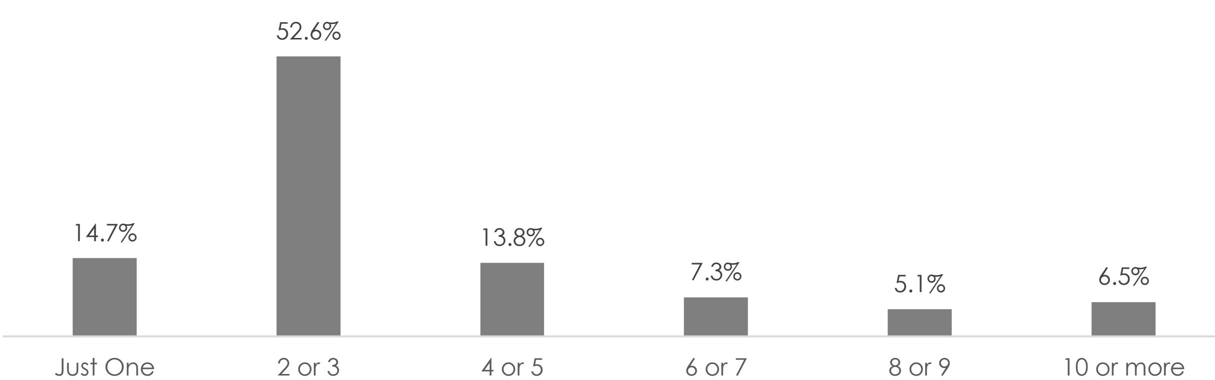
The eating-out market is in growth but our research shows that some people are spending less. The long-term trends are hugely favourable but there are immediate food business challenges which comprise intense competition and possible margin contraction, as operators battle for customers.

In the reasons given for a reduction in the frequency of eating out, we can see a consistent pattern emerging. By far the most important reason for not eating out so often is the need to save money. The above confirms our understanding of the medium-term consumer climate, with a sustained focus on price and value likely to be dominating the minds of many consumers in the coming years. Some answers point to wider consumer trends, including the preference for cooking at home from scratch and the move towards trying to eat more healthily. These areas of interest, cooking and health, also offer opportunities for the foodservice sector, including food festivals, and the emergence of new, healthier menus and formats.

Frustrations regarding out-of-home have been analysed in view of informing food businesses on the dangers of losing clients while also providing cues for improvements. 'Waiting for food to arrive' scored 57 on 100 and was the highest rated, followed by 'Waiting for a table' at 40.5 and 'Waiting to place your order' at 30.7.



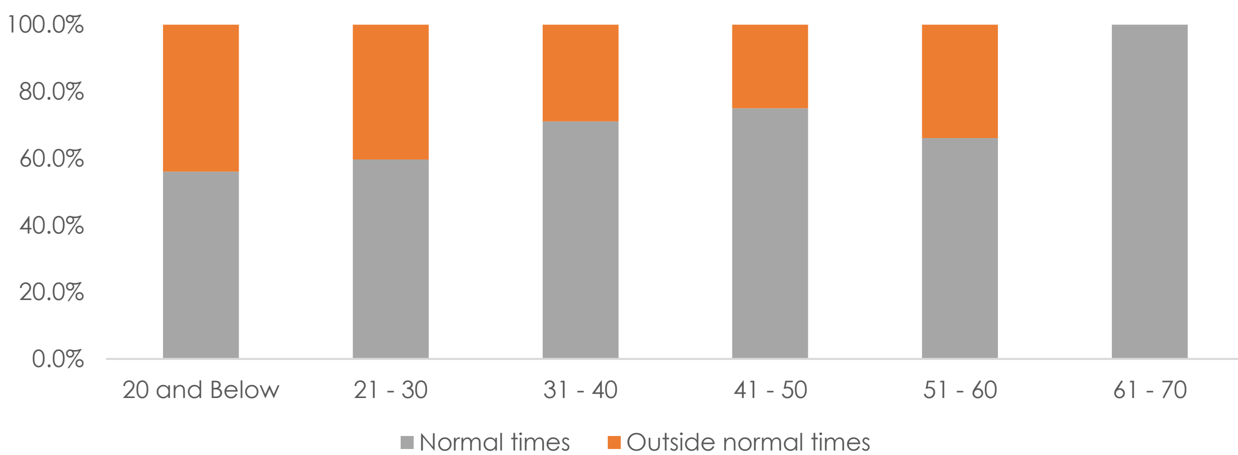
In general, when deciding where to eat out-of-home people generally consider 2 to 3 outlets, as cited by 52.6% of respondents.




Coffee MENU

Generational differences in eating out-of-home demonstrate that close to 40% of 20-year old's and below eat outside normal times

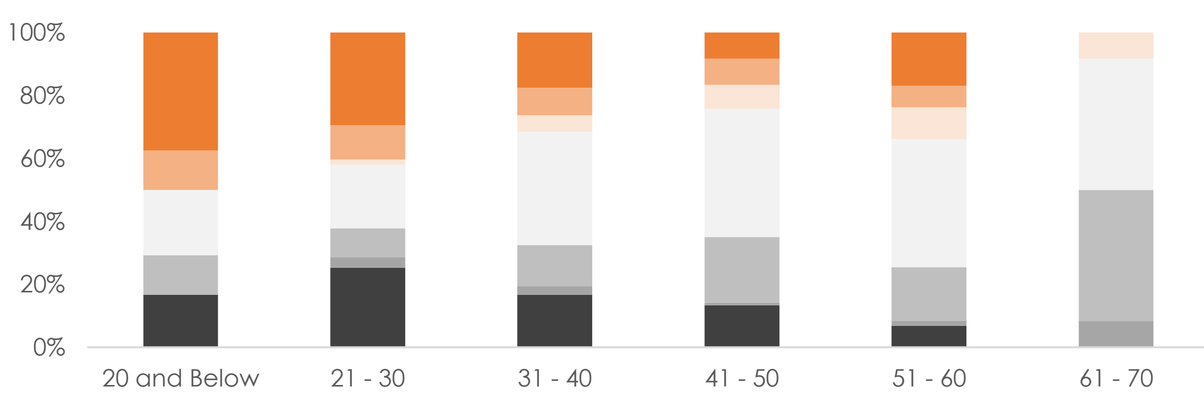
Generational analysis was undertaken in this section of the report to provide additional insights on how the eating out market varies according to different age groups. It is noted that eating outside of normal times decreases as we look at older age groups, moving from 20 and below to 41 – 50 year old's. 0% of people aged 61 – 70 do not eat outside of normal times.



When was the last time you ate out? Responses are broken down across age groups.

From 20 and below to 61 – 70, the percentage of people having eaten out today is on a decreasing trend, at a figure of 12.5% across 20 and below, to 0% across 61 – 70.

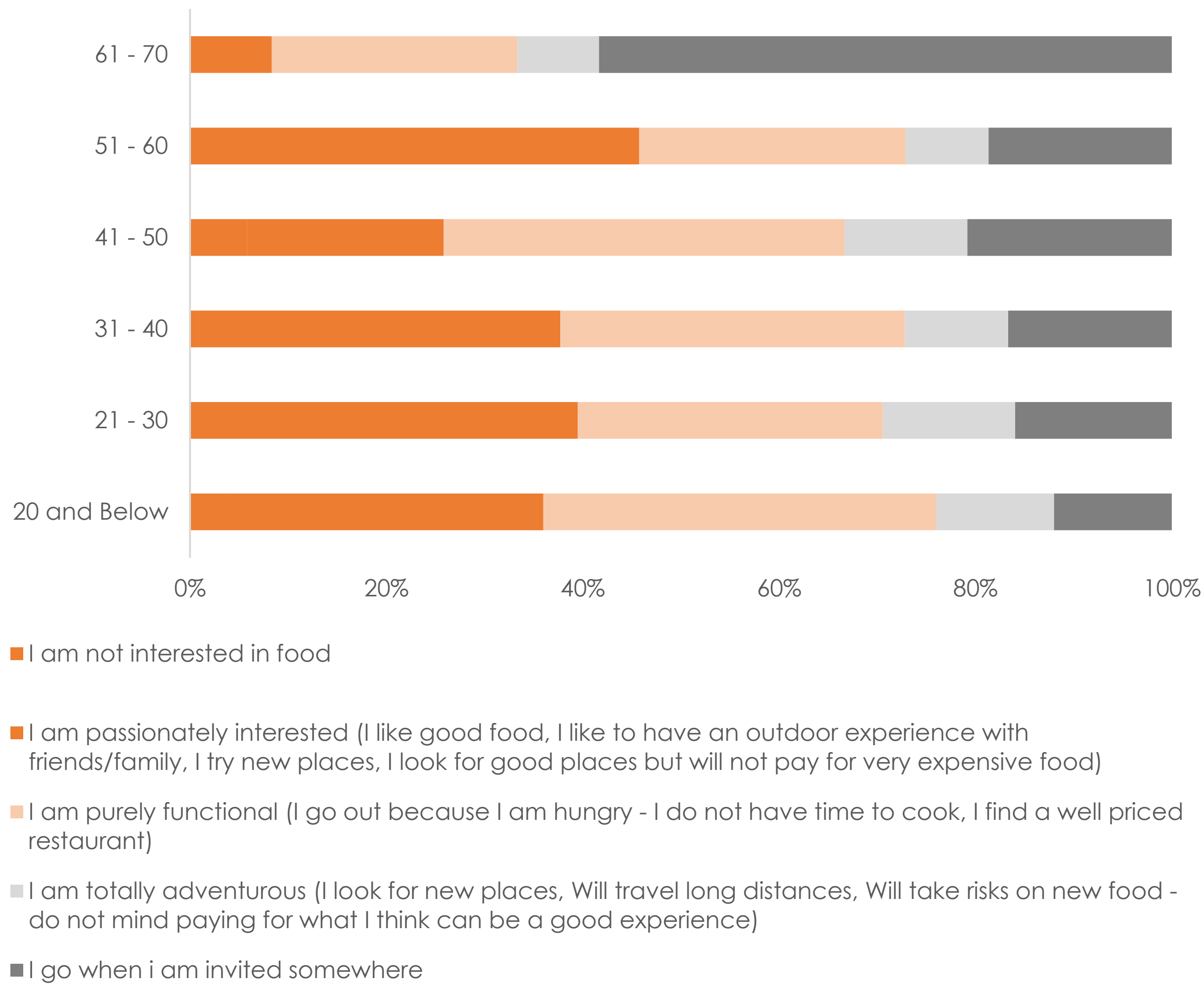
The majority of people across most age groups have eaten out last week, at an average of 36%. Across 21-30 year old's, the frequency the most mentioned is during the course of the week, at 25.2%.



We asked respondents to rate their relationship with food and drink on a scale from purely functional to passionately interested and their degree of adventurousness on a scale from not at all (stick to what I know) to totally adventurous (love to try new things).

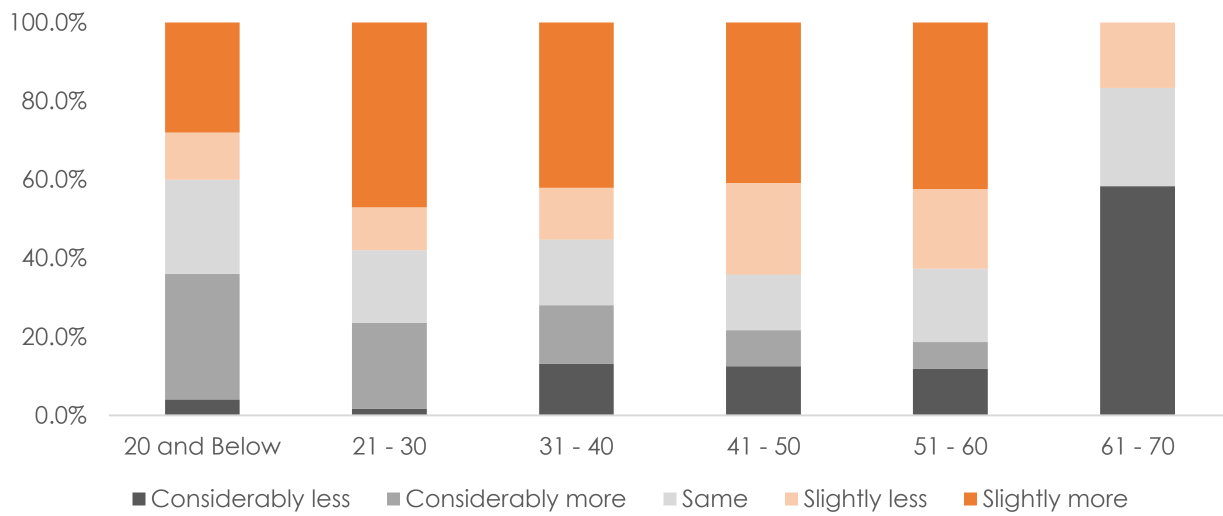
The 61 – 70 year old's, in large part, have stated that they only go somewhere when they are invited, at 58.3%.

'I am not interested in food' increases from age group 21 – 30 to 61 – 70, moving from 0% to 8.3%.



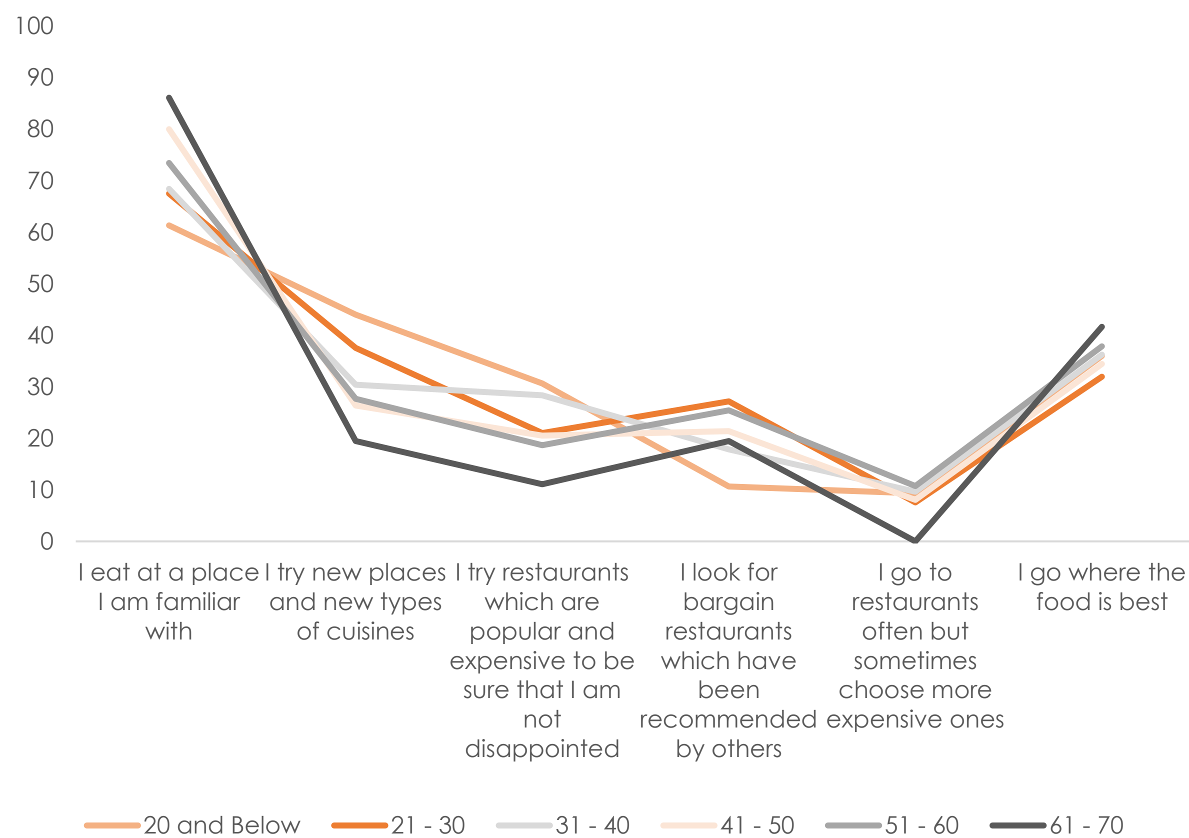
Evolution of eating out was determine across age groups, and results are depicted below.

58.3% of 61 – 70 year olds eat out considerably less today. The percentage of people who today eat out considerably more than before decreases from 20 and below to 61 – 70, from 32% to 0%. 'Slightly more' was mentioned by an average of 40.1% of respondents across all age groups except the 61 – 7 year old's, where the figure is 0%.



Eating experiences is seen to be consistent across all age groups, as per below chart. The majority of people across all age groups have ranked 'I eat at a place I am familiar with' highest, achieving an average score of 72.8 over 100.

I go to restaurants often but sometimes choose more expensive ones ranked lowest, at an average of 7.6%.



Amongst these, the 51 – 60 age groups provided a relatively higher score to this criteria. 'I try new places and new types of cuisines' obtained the highest score from the 20 and below age group.

The top eating out-of-home brands of 2020 by category

The study conducted explores the trend shaping eating outdoors. 9 categories of most consumed food types have been illustrated in the table below, summarizing the top 3 restaurant brands for each category. A challenger brand category has been included so as to put into limelight the so-called 'smaller' brands or 'ti-baz' where food quality is appreciated at the national level and irrespective of location, those brands are well known by many. We therefore pointed out the challenger brands in those nine categories to promote them and to give tribute to those challengers which are being recognized in quality and brand in this report.

The top brands are revealing and now provide a base for the annual series of OH FOOD. We see four pillars through which those brands featuring in the top brands have been able to capitalize on. Time, place, propensity to spend and mobile. Time, place and propensity to spend are socio-economic characteristics which brands have leveraged on. Mobile and technology is probably where brands could do more as those which adopt new trends are likely to have more competitive advantages. Tracking of the best brands in subsequent years will reveal the volatility of the market and how brands are evolving in the ou-of-home market.

Sen & Ken is the popular choice for many people. Having an affordable pricing and a wide range of most popular dishes, Sen & Ken has demonstrated that it is the top brand in four categories. Situated in the most visited food courts, Sen & Ken has a national reach (pillar of place). In addition to having a variety of Asian and Mauritian cuisine to offer, it somehow controls a monopoly in the out-of-home segment.

Category	Top 3 Brands 2020	Challenger Brands 2020
Boulettes	#1 Ah Kong #2 Canelo #3 Boulettes Palace	**Ti rouge snack** **Jim Boulettes**
Bol Renverser	#1 Sen & Ken #2 Taste of Asia #3 Comlone Restaurant	**Al-Waseelah** **CHOPWOK Restaurant**
Briyani	#1 Star Deg #2 Briani Deg D'or #3 Sherab & Sons- Briani House	**Le ravinale** **Pyramid Briani**
Burgers and Grills	#1 KFC #2 McDonald's #3 Elizabeth Burger and Grill	**Ricardo's Fast Food** **Tipo Grill**
Roti and Dal Puri	#1 Dewa Dholl Puri #2 Roti Aka #3 Chapeau la paille	**Dholl Puri Béré** **Ramsahye Maraz**

Kebab	#1 Gloria Fast Food #2 DILS #3 Sen & Ken	**Happy Chick'n Amigos Barrack Snack**
Mine bouillie	#1 Sen & Ken #2 Taste of Asia #3 L'oasis Boulettes	**Ni Hao Go Yuyu**
Mine Frite	#1 Sen & Ken #2 Taste of Asia #3 Hong Kong palace	**Ti Tonton Singer snack**
Riz Frite	#1 Sen & Ken #2 Taste of Asia #3 Comlone restaurant	**3J's Family Restaurant Snack Chan Kong**

For authentic Briyani experience, Star Deg has been ranked as the top brand to eat Briyani. Star Deg has quite the reputation in the country for its authentic and delicious biryani variations. In terms of Burgers, top of the list are KFC and McDonald's, respectively first and second. However, Ricardo Fast Food and Tipo Grill are considered as challenger brands that have gained a lot of popularity and recognized nationally.

Category: Boulettes, Top 15

Rank	TOP BRANDS 2020	%
1	**Ah Kong**	17.2%
2	**Canelo**	15.6%
3	**Ken's**	13.2%
4	**Sen & Ken**	11.3%
5	**Boulettes Palace**	8.7%
6	**Taste of Asia**	7.1%
7	**L'oasis Boulettes**	4.9%
8	**Chee Li Chop**	3.8%
9	**Jim Boulettes**	3.7%
10	**Le Bamboo Resto**	3.3%
11	**Ah Youn Snack**	2.6%
12	**Ti Rouge Snack**	2.4%
13	**Les Alizés**	2.3%
14	**Aslam Snack**	2.0%
15	**3j's Family Restaurant**	2.0%

Four brands were rated as their preferred places to eat 'boulettes' and obtained above 10% of mentions. Those were Ah Kong, Canelo, Ken's and Sen & Ken. The best brand 2020 in this category was Ah Kong. Ah-Kong is located in the heart of Beau-Bassin and its Boulettes are the most popular amongst. Canelo ranks second with a popularity of 15.6%. Canelo has 3 branches in Mauritius located in Riche-Terre Mall, Gool Square and Jumbo Phoenix.

Boulettes Palace, with a popularity of 8.7% is in a vibrant location to eat, especially late night during Fridays and Saturdays. Ah Youn has gained a lot of praise and love from the population ranking 11th in the OH FOOD table 2020. Ti Rouge Snack is also a challenger brand with a 2.4% choice from the respondent base.

Category: Bol Renverser: Top 15

Rank	TOP BRANDS 2020	%
1	Sen & Ken	27.5%
2	Taste of Asia	17.4%
3	Comlone restaurant	9.8%
4	Hong Kong palace	8.6%
5	Ah Youn Snack	6.3%
6	Choice palace	3.9%
7	Jaws Snack	3.7%
8	Singer snack	3.5%
9	CHOPWOK Restaurant	3.3%
10	Le Chinois	3.3%
11	Ti Tonton	2.6%
12	Al Waseelah Restaurant	2.5%
13	3j's Family Restaurant	2.5%
14	Royal Choice	2.5%
15	Pyramid Snack	2.5%

Sen & Ken offers a gamut of different types of cuisine to Mauritians at an affordable price and is ranked top brand in the 'bol renverser' category. Taste of Asia has gained a lot of praise and ranked second, followed by Comlone restaurant in third. CHOPWOK Restaurant is deemed as a challenger brand ranking ninth in the table. Al Waseelah is also a challenger brand that ranked twelve.

Category: Briyani: Top 15

Rank	TOP BRANDS 2020	%
1	**Star Deg**	29.80%
2	**Briani Deg D'or**	8.40%
3	**Sherab & Sons- Briani House**	7.90%
4	**Le Ravinale**	5.30%
5	**Pyramid Briani**	5.20%
6	**Briyani House - Flacq**	5.00%
7	**Tariq snack**	4.10%
8	**Suraj Snack**	4.00%
9	**Sen & Ken**	3.00%
10	**Nayaz Briyani**	2.80%
11	**Star Briani**	2.60%
12	**Briani House - Port Louis**	2.50%
13	**Sen & Ken**	2.40%
14	**Meem Snack**	2.20%
15	**Royal Saffron**	2.20%

Star Deg obtained above close to a third of mentions and is the best Briyani Brand 2020. Briani Deg D'Or House was ranked second. As an emerging Briyani restaurant, Le ravinale emerges as a challenger brand as long with Pyramid Briani, located at Vieux Moulin shopping centre in Rose Belle.

Category: Burgers and Grills: Top 15

Rank	TOP BRANDS 2020	%
1	**KFC**	35.0%
2	**McDonald's**	22.9%
3	**Elizabeth burger and grill**	6.8%
4	**AMIGOS RESTO & GRILL**	5.6%
5	**RocoMamas**	4.7%
6	**Ricardo's Fast Food**	4.3%
7	**Burger's King**	2.9%
8	**Happy Eater**	2.9%
9	**Galito's**	2.8%
10	**Jacksons American Burger**	2.5%
11	**KBC GRILL**	2.2%
12	**Flamingos grill house**	2.0%
13	**Tipo grill**	1.9%
14	**Steers**	1.9%
15	**Buddy's Burger**	1.8%

Burgers remain widely popular, especially with well established brands such as KFC and McDonald's being in this category. KFC was the best rated brand with 35% of mentions followed by McDonald's with 22.9%. Elizabeth burger and grill, based in Port Louis is third ranked, with 6.8% of mentions. KFC first opened its doors back in 1983 opposite the filling station in Curepipe not far from the Sainte Thérèse Church. Being a multinational, KFC does not need an introduction. Kentucky Fried Chicken is an American style cuisine that came to Mauritius in 1983 and has 21 restaurants across the island. Ranked 2nd on our ranking, McDonald's brand is famous around the globe. Elizabeth burger and grill has been ranked 3rd in our table. Located in Port-Louis and Beau Bassin, Ricardo has become a very popular brand and is a challenger brand along with Tipo Grill.

Category: Roti and Dholl Puri: Top 15

Rank	TOP BRANDS 2020	%
1	Dewa Dholl Puri	27.4%
2	Roti Aka	22.1%
3	Chapeau la Paille	15.6%
4	Ramsahye Maraz	8.3%
5	Cassim	4.5%
6	Sen & Ken	4.4%
7	Dholl Puri Béré	2.3%
8	Muslim - Flacq	1.9%
9	ALLY	1.7%
10	Escale Farata C''z Sam	1.6%
11	Ti Bhai	1.4%
12	Roti sultan	1.3%
13	Chez Vivi	1.2%
14	Chez Bye	1.0%
15	Bateau Roche	1.0%

Dewa Dholl Puri is the highest ranked brand for the year 2020, followed by Roti Aka and Chapeau La Paille. Ranked as the second highest brand with 22.1%, Roti Aka is the second best ranked brand. Chapeau La Paille is ranked in third position.

Category: Kebab: Top 15

Rank	TOP BRANDS 2020	%
1	**Gloria Fast food**	18.9%
2	**DILS**	13.3%
3	**Sen & Ken**	8.2%
4	**Sheikh kebab**	8.0%
5	**Shabaan kebab**	7.7%
6	**Mr Kebab**	7.6%
7	**Shah kebab**	7.0%
8	**AMIGOS**	6.0%
9	**Barrack Snack**	5.6%
10	**Saveur des Iles**	5.1%
11	**Royal Kebabs**	3.5%
12	**Kebab island**	2.0%
13	**Happy Chick'n**	1.9%
14	**Chicken Express**	1.6%
15	**Elizabeth Burger and Grill**	1.6%

Gloria Fast Food was rated best brand in the Kebab category, followed by Dil's. Sen & Ken comes third for the kebab ranking brand. Happy Chick'n is a challenger brand situated in Phoenix which is gaining popularity.

Category: Mine Bouille: Top 15

Rank	TOP BRANDS 2020	%
1	**Sen & Ken**	27.8%
2	**Taste of Asia**	15.4%
3	**L'oasis Boulettes**	10.2%
4	**Ken's**	6.6%
5	**Ti Rouge Snack**	5.9%
6	**Ti Tonton**	4.6%
7	**Go Yuyu**	3.9%
8	**Restaurant La Riviere**	3.7%
9	**Ah Youn Snack**	3.2%
10	**Hong Kong palace**	2.9%
11	**Ah Kong**	2.9%
12	**Kevin snack**	2.9%
13	**Ni Hao**	2.9%
14	**3j's Family Restaurant**	2.9%
15	**Snack Chan Kong**	2.9%

Sen and Ken rated best 'Mine Bouille' for 2020 followed by 'Taste of Asia' and L'Oasis Boulettes with 10.2% and in third position. Ti Rouge snack is found in Vacoas-Phoenix and is highly popular for its tasty noodles featuring in our best brands.

Category: Mine Frite: Top 15

Rank	TOP BRANDS 2020	%
1	Sen & Ken	29.7%
2	Taste of Asia	17.9%
3	Hong Kong palace	6.0%
4	Ti Rouge Snack	5.7%
5	L'Oasis Boulettes	4.7%
6	Ti Tonton	4.4%
7	Comlone restaurant	4.2%
8	Royal Saffron	4.2%
9	Singer snack	4.0%
10	Ni Hao	2.7%
11	Ah Youn Snack	2.4%
12	Chee Li Chop	2.4%
13	Snack Chan Kong	2.4%
14	Restaurant La Riviere	2.4%
15	CHOPWOK Restaurant	2.4%

Sen & Ken rated best 'Mine Frite' for 2020 followed by 'Taste of Asia' and Chez Sunny in third position.

Category: Riz Frite: Top 15

Rank	TOP BRANDS 2020	%
1	**Sen & Ken**	34.5%
2	**Taste of Asia**	17.5%
3	**Comlone restaurant**	7.3%
4	**Hong Kong palace**	5.5%
5	**Choice palace**	3.7%
6	**AH YOUN SNACK**	3.6%
7	**Ti Tonton**	3.4%
8	**Royal Saffron**	3.1%
9	**Ti Rouge Snack**	2.9%
10	**L'oasis Boulettes**	2.9%
11	**Restaurant Canton**	2.8%
12	**Snack Chan Kong**	2.4%
13	**3j's Family Restaurant**	2.4%
14	**CHOPWOK Restaurant**	2.4%
15	**Singer Restaurant**	2.4%

Sen and Ken rated best 'Riz Frite' for 2020 followed by 'Taste of Asia' and Comlone restautant in third position. 3j's Family Restaurant is deemed as a challenger brand. Snack Chan Kong is ideally located in the heart of Beau-Bassin and is also a challenger brand.

ABOUT THE RESEARCH

A sample of 3,400 people surveyed was representative of the population by gender, age, geographical location, socio-demographical grouping and district. The data collection was undertaken continuously over close to five months, throughout the year 2020.

ABOUT VERDE

VERDE is a full-service strategic research and corporate finance advisory practice, built on the belief that our economies and societies are underpinned by and reliant on science to make informed decisions. At VERDE, we blend technology and statistical tools with traditional market research solutions to uncover insights which help our clients propel their businesses forward. Building on a strong research foundation, our passion and purpose is to bring research to life to solve the most complex issues of our clients.

The link between evidence, data, factual analysis and independent advice from multi-disciplinary experts is today critical and valued. In the markets we operate, there is an abundance of potential which can be delivered. We specialise in the latest research methodologies and most innovative offerings, ranging from data consulting, surveys, modelling, data-driven communications and creative works. Creative and inquisitive, we are passionate about empowering our clients to make the decisions that matter. We work with organisations to define and overcome strategic challenges – helping them get to grips with the markets in which their brands operate. We use the right approach and methodology to deliver robust insights, strategic counsel and targeted recommendations that generate change and positive outcomes. Our clients trust us for our high quality work as well as our creative storytelling techniques that connect with key stakeholders.

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