



Euromonitor
International

Cafés/Bars in Singapore

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Cafés/Bars in Singapore - Category analysis

KEY DATA FINDINGS

2025 DEVELOPMENTS

Specialist coffee and tea shops driving category expansion

INDUSTRY PERFORMANCE

Rising costs and cautious spending lead to softer everyday cafés/bars demand

Specialist coffee and tea shops emerge as the clear growth engine in a fragmenting market

Health-conscious trade-offs reshape everyday beverage choices

WHAT'S NEXT?

Increasing dependence on specialist coffee chains

Digital ordering and pick-up gain importance as fulfilment diverges across categories

Automation and AI-driven beverage formats redefine the next wave of innovation

COMPETITIVE LANDSCAPE

Leadership shifts as The Coffee Bean & Tea Leaf overtakes Starbucks amid rising competitive pressures

Chagee and Luckin gain rapid traction through differentiation

Scale advantages expand as chains and independents sharpen their market roles

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Consumer Foodservice in Singapore - Industry Overview

EXECUTIVE SUMMARY

Stability in a challenging environment

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INDUSTRY PERFORMANCE

Customer spending shapes a more selective foodservice recovery in 2025

Convenience-led fulfilment gains momentum with delivery and takeaway reshaping routine consumption

Experiences and loyalty programmes emerge as key levers for differentiation in a value-conscious market

WHAT'S NEXT?

Foodservice growth expected to remain modest as consumers stay value conscious

Innovation shifts toward fulfilment efficiency, leaner formats and operational simplification

Health and transparency expected to gain influence as sustainability progresses more gradually

COMPETITIVE LANDSCAPE

McDonald's maintains market leadership through scale, value positioning and strong digital engagement
International brands: Chagee, Luckin Coffee and Mixue stand out as the most dynamic operators in 2025
International brands continue to enter and expand, intensifying competitive pressure across categories

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