



# Consumer Foodservice in Singapore

March 2026

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## Consumer Foodservice in Singapore

### 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

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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

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A challenging environment

## INDUSTRY PERFORMANCE

Retail locations the strongest performing non-standalone format in 2025

Standalone locations preserve their share but show signs of demand softening in 2025

Consumers balance value and experience more consciously in 2025, prompting operators to refine their offerings

## WHAT'S NEXT?

Retail locations expected to remain resilient over the forecast period

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Cost pressures and evolving fulfilment needs present challenges, while efficiency-led models and policy support offer new opportunities

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