



# Hot Drinks in Singapore

November 2025

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# Hot Drinks in Singapore

## EXECUTIVE SUMMARY

Premiumisation, price rises, and health all impact retail value sales

## KEY DATA FINDINGS

### INDUSTRY PERFORMANCE

Value growth driven by price rises and rising demand for healthy variants

Coffee sees value dynamism due to premiumisation

Cost-effective foodservice outlets offering convenience and personalisation succeed

Sustainability must be affordable, and an integral part of the offering

Wellness is a mainstream trend, and products need to align with health objectives

### WHAT'S NEXT?

Continued retail value growth, driven by premiumisation and functional variants

Innovation will be important, but must come alongside affordability

Distribution expected to continue to move towards retail e-commerce

### COMPETITIVE LANDSCAPE

Nestlé extends its dominance, driven by innovation and quality

ITO EN sees dynamic growth thanks to its focus on matcha products

Experiential consumption is important in Singapore

### CHANNELS

Consumers still prefer supermarkets, as a trusted distribution channel

Retail e-commerce sees dynamism – particularly favoured by health-conscious consumers

Foodservice volume share rises as consumers look for personalisation and experiences

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### KEY DATA FINDINGS

#### 2025 DEVELOPMENTS

Prices continue to rise, which hampers retail volume growth but drives value sales

#### INDUSTRY PERFORMANCE

Rising costs reshape consumer priorities, although the premium segment still grows

Demand for convenient café-style solutions drives growth for coffee pods

#### WHAT'S NEXT?

Growth ahead, but pricing strains are expected to reshape value expectations

Technology will continue to redefine coffee consumption through personalisation and efficiency

Wellness and sustainability must deliver without the premium price tag

#### COMPETITIVE LANDSCAPE

Innovation and sustainability prove relevant even under price pressure

Jacobs Douwe Egberts performs well by focusing on wellbeing and sustainability

#### CHANNELS

Supermarkets maintains its dominance as affordability and familiarity are paramount

Tailored experiences and transparent pricing drive growth for retail e-commerce

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### KEY DATA FINDINGS

#### 2025 DEVELOPMENTS

Tea remains resilient as a move to wellness options is seen

#### INDUSTRY PERFORMANCE

In a price-stable category, tea brands continue to capitalise on wellness

Increasing demand for wellness-oriented products drives growth for fruit/herbal tea

## WHAT'S NEXT?

Rising cost sensitivity and demand for personalised wellness to redefine how Singaporeans discover and buy tea  
Technology will continue to transform tea into a personalised wellness journey  
Sustainability and wellness are expected to reshape tea in Singapore

## COMPETITIVE LANDSCAPE

Lipton maintains its lead as tea consumers in Singapore seek value with purpose  
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## CHANNELS

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[Other Hot Drinks in Singapore](#)

## KEY DATA FINDINGS

### 2025 DEVELOPMENTS

Retail value growth is achieved through premiumisation

## INDUSTRY PERFORMANCE

Premiumisation and healthy nutrition drive retail value growth  
Other plant-based hot drinks benefit from functional benefits  
Foodservice volumes are high and rising

## WHAT'S NEXT?

Health trends to reshape the future of other hot drinks in Singapore  
Digital innovation to reshape other hot drinks in Singapore  
Health policy and eco goals to drive innovation in other hot drinks in Singapore

## COMPETITIVE LANDSCAPE

Nestlé maintains its dominance, driven by the success of Milo  
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## CHANNELS

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