



Euromonitor  
International

# Consumer Foodservice in the Philippines

March 2026

Table of Contents

## Consumer Foodservice in the Philippines

### EXECUTIVE SUMMARY

Improving local conditions spur consumer foodservice value sales

### KEY DATA FINDINGS

#### INDUSTRY PERFORMANCE

Easing inflation and mobility normalisation support consumer foodservice growth in 2025

Fulfillment continues to shape how consumers access foodservice

Outlet refreshes and network expansion improve the consumer experience

#### WHAT'S NEXT?

Positive performance expected for consumer foodservice as key trends continue over the forecast period

Innovation to focus on digital ecosystems and operational efficiency

Sustainability to gain weight in major chains

#### COMPETITIVE LANDSCAPE

Jollibee invests to consolidate its leadership in 2025

Ai-cha Food PH Inc emerges as the most dynamic company in 2025

Major company and brand developments in 2024-2025

#### CHANNELS

Chained operators make gains through franchising

Independents adjust to meet growing challenges and remain competitive

#### MARKET DATA

Table 1 - Units, Transactions and Value Sales in Consumer Foodservice 2020-2025

Table 2 - Units, Transactions and Value Sales in Consumer Foodservice: % Growth 2020-2025

Table 3 - Consumer Foodservice by Independent vs Chained by Type: Units/Outlets 2025

Table 4 - Consumer Foodservice by Independent vs Chained: % Foodservice Value 2020-2025

Table 5 - Sales in Consumer Foodservice by Food vs Drink Split: % Foodservice Value 2020-2025

Table 6 - Sales in Consumer Foodservice by Food vs Drink Split by Type: % Foodservice Value 2025

Table 7 - Sales in Consumer Foodservice by Location: % Foodservice Value 2020-2025

Table 8 - Sales in Consumer Foodservice by Fulfillment: % Foodservice Value 2020-2025

Table 9 - GBO Company Shares in Chained Consumer Foodservice: % Foodservice Value 2021-2025

Table 10 - GBN Brand Shares in Chained Consumer Foodservice: % Foodservice Value 2022-2025

Table 11 - GBN Brand Shares in Chained Consumer Foodservice: Units/Outlets 2025

Table 12 - Forecast Units, Transactions and Value Sales in Consumer Foodservice 2025-2030

Table 13 - Forecast Units, Transactions and Value Sales in Consumer Foodservice: % Growth 2025-2030

#### DISCLAIMER

#### SOURCES

Summary 1 - Research Sources

## Cafés/Bars in the Philippines

### KEY DATA FINDINGS

#### 2025 DEVELOPMENTS

Faster growth in transactions and value sales in 2025

#### INDUSTRY PERFORMANCE

Growth is driven by the expanding coffee culture

Strongest growth comes from specialist coffee shops  
Value for money remains a key sales driver in cafés/bars

#### WHAT'S NEXT?

Positive outlook for cafés/bars in the forecast period  
Fulfillment to remain eat-in based, but convenience stores may pose a challenge  
Rapid expansion of value-driven coffee chains

#### COMPETITIVE LANDSCAPE

Starbucks benefits from openness and community initiatives but the competitive landscape is intensifying  
Rapid expansion of Zus Coffee  
Chained operators gain momentum

#### CATEGORY DATA

Table 14 - Cafés/Bars by Category: Units/Outlets 2020-2025  
Table 15 - Sales in Cafés/Bars by Category: Number of Transactions 2020-2025  
Table 16 - Sales in Cafés/Bars by Category: Foodservice Value 2020-2025  
Table 17 - Cafés/Bars by Category: % Units/Outlets Growth 2020-2025  
Table 18 - Sales in Cafés/Bars by Category: % Transaction Growth 2020-2025  
Table 19 - Sales in Cafés/Bars by Category: % Foodservice Value Growth 2020-2025  
Table 20 - GBO Company Shares in Chained Cafés/Bars: % Foodservice Value 2021-2025  
Table 21 - GBN Brand Shares in Chained Cafés/Bars: % Foodservice Value 2022-2025  
Table 22 - Forecast Cafés/Bars by Category: Units/Outlets 2025-2030  
Table 23 - Forecast Sales in Cafés/Bars by Category: Number of Transactions 2025-2030  
Table 24 - Forecast Sales in Cafés/Bars by Category: Foodservice Value 2025-2030  
Table 25 - Forecast Cafés/Bars by Category: % Units/Outlets Growth 2025-2030  
Table 26 - Forecast Sales in Cafés/Bars by Category: % Transaction Growth 2025-2030  
Table 27 - Forecast Sales in Cafés/Bars by Category: % Foodservice Value Growth 2025-2030

#### DISCLAIMER

[Full-Service Restaurants in the Philippines](#)

#### KEY DATA FINDINGS

##### 2025 DEVELOPMENTS

Key trends prove robust to add dynamism to full-service restaurants

#### INDUSTRY PERFORMANCE

Improved eat-in traffic drives growth in full-service restaurants  
Asian full-service restaurants lead the way  
Digital platforms increase penetration in full-service restaurants

#### WHAT'S NEXT?

Local dining scene is shifting towards experience-driven choices  
Digital platforms to drive fulfillment evolution  
Innovation in dining experiences and more sustainable practices

#### COMPETITIVE LANDSCAPE

Shakey's and Max's retain consumer attention to lead the field  
Demand for modern Filipino dining creates momentum for Mesa  
Chained operators continue to expand and gain share

#### CATEGORY DATA

Table 28 - Full-Service Restaurants by Category: Units/Outlets 2020-2025

Table 29 - Sales in Full-Service Restaurants by Category: Number of Transactions 2020-2025  
Table 30 - Sales in Full-Service Restaurants by Category: Foodservice Value 2020-2025  
Table 31 - Full-Service Restaurants by Category: % Units/Outlets Growth 2020-2025  
Table 32 - Sales in Full-Service Restaurants by Category: % Transaction Growth 2020-2025  
Table 33 - Sales in Full-Service Restaurants by Category: % Foodservice Value Growth 2020-2025  
Table 34 - GBO Company Shares in Chained Full-Service Restaurants: % Foodservice Value 2021-2025  
Table 35 - GBN Brand Shares in Chained Full-Service Restaurants: % Foodservice Value 2022-2025  
Table 36 - Forecast Full-Service Restaurants by Category: Units/Outlets 2025-2030  
Table 37 - Forecast Sales in Full-Service Restaurants by Category: Number of Transactions 2025-2030  
Table 38 - Forecast Sales in Full-Service Restaurants by Category: Foodservice Value 2025-2030  
Table 39 - Forecast Full-Service Restaurants by Category: % Units/Outlets Growth 2025-2030  
Table 40 - Forecast Sales in Full-Service Restaurants by Category: % Transaction Growth 2025-2030  
Table 41 - Forecast Sales in Full-Service Restaurants by Category: % Foodservice Value Growth 2025-2030

## DISCLAIMER

## Limited-Service Restaurants in the Philippines

### KEY DATA FINDINGS

#### 2025 DEVELOPMENTS

Limited-service restaurants show dynamism as market conditions improve

#### INDUSTRY PERFORMANCE

Multiple growth drivers for limited-service restaurants in 2025

Expansion drives strong foodservice value sales growth for chicken limited-service restaurants in 2025

Delivery remains significant as players expand fulfillment scope

#### WHAT'S NEXT?

Continued growth expected for limited-service restaurants

Delivery to gain momentum as fulfillment evolves

Players to push sustainability

#### COMPETITIVE LANDSCAPE

Jollibee strengthens products and services to consolidate leadership

South Korean fried chicken chain BBQ continues to post the highest growth rate in foodservice value sales

Franchising strengthens the dominance of chained operators

#### CATEGORY DATA

Table 42 - Limited-Service Restaurants by Category: Units/Outlets 2020-2025  
Table 43 - Sales in Limited-Service Restaurants by Category: Number of Transactions 2020-2025  
Table 44 - Sales in Limited-Service Restaurants by Category: Foodservice Value 2020-2025  
Table 45 - Limited-Service Restaurants by Category: % Units/Outlets Growth 2020-2025  
Table 46 - Sales in Limited-Service Restaurants by Category: % Transaction Growth 2020-2025  
Table 47 - Sales in Limited-Service Restaurants by Category: % Foodservice Value Growth 2020-2025  
Table 48 - GBO Company Shares in Chained Limited-Service Restaurants: % Foodservice Value 2021-2025  
Table 49 - GBN Brand Shares in Chained Limited-Service Restaurants: % Foodservice Value 2022-2025  
Table 50 - Forecast Limited-Service Restaurants by Category: Units/Outlets 2025-2030  
Table 51 - Forecast Sales in Limited-Service Restaurants by Category: Number of Transactions 2025-2030  
Table 52 - Forecast Sales in Limited-Service Restaurants by Category: Foodservice Value 2025-2030  
Table 53 - Forecast Limited-Service Restaurants by Category: % Units/Outlets Growth 2025-2030  
Table 54 - Forecast Sales in Limited-Service Restaurants by Category: % Transaction Growth 2025-2030  
Table 55 - Forecast Sales in Limited-Service Restaurants by Category: % Foodservice Value Growth 2025-2030

## DISCLAIMER

### Street Stalls/Kiosks in the Philippines

#### KEY DATA FINDINGS

##### 2025 DEVELOPMENTS

Quick and affordable remain watchwords for street stalls/kiosks

##### INDUSTRY PERFORMANCE

Street stalls/kiosks continue to appeal to busy and on-the-go consumers

Chained outpaces independents in growth terms in 2025

Value for money remains a key driver of consumers' purchasing decisions

##### WHAT'S NEXT?

Street stalls/kiosks to continue to fit well with the search for affordable, grab-and-go food and drinks

Takeaway remains core, while delivery gains importance

Innovation to focus on beverages, formats and efficiency

##### COMPETITIVE LANDSCAPE

Franchise model enjoys popularity

Ai-CHA is a dynamic brand in 2025

Chained operators gain ground but independents dominate with widely available local favourites

##### CATEGORY DATA

Table 56 - Street Stalls/Kiosks: Units/Outlets 2020-2025

Table 57 - Sales in Street Stalls/Kiosks: Number of Transactions 2020-2025

Table 58 - Sales in Street Stalls/Kiosks: Foodservice Value 2020-2025

Table 59 - Street Stalls/Kiosks: % Units/Outlets Growth 2020-2025

Table 60 - Sales in Street Stalls/Kiosks: % Transaction Growth 2020-2025

Table 61 - Sales in Street Stalls/Kiosks: % Foodservice Value Growth 2020-2025

Table 62 - GBO Company Shares in Chained Street Stalls/Kiosks: % Foodservice Value 2021-2025

Table 63 - GBN Brand Shares in Chained Street Stalls/Kiosks: % Foodservice Value 2022-2025

Table 64 - Forecast Street Stalls/Kiosks: Units/Outlets 2025-2030

Table 65 - Forecast Sales in Street Stalls/Kiosks: Number of Transactions 2025-2030

Table 66 - Forecast Sales in Street Stalls/Kiosks: Foodservice Value 2025-2030

Table 67 - Forecast Street Stalls/Kiosks: % Units/Outlets Growth 2025-2030

Table 68 - Forecast Sales in Street Stalls/Kiosks: % Transaction Growth 2025-2030

Table 69 - Forecast Sales in Street Stalls/Kiosks: % Foodservice Value Growth 2025-2030

## DISCLAIMER

### Consumer Foodservice By Location in the Philippines

#### KEY DATA FINDINGS

##### 2025 DEVELOPMENTS

Key location types see development in 2025

##### INDUSTRY PERFORMANCE

Travel registers fastest value sales growth in consumer foodservice by location in 2025

Standalone locations benefit from suburban growth and delivery services

Delivery is a key fulfillment option across locations

##### WHAT'S NEXT?

Travel locations set to continue to drive foodservice value sales growth over the forecast period  
Standalone and retail to continue to develop as foodservice locations  
Challenges and opportunities across foodservice locations  
Demographic shifts to influence location performance

## COMPETITIVE LANDSCAPE

Strong and developing foodservice by location types  
Foodservice locations remain vulnerable to climatic conditions

## CATEGORY DATA

- Table 70 - Consumer Foodservice by Location: Units/Outlets 2020-2025
- Table 71 - Sales in Consumer Foodservice by Location: Number of Transactions 2020-2025
- Table 72 - Sales in Consumer Foodservice by Location: Foodservice Value 2020-2025
- Table 73 - Consumer Foodservice by Location: % Units/Outlets Growth 2020-2025
- Table 74 - Sales in Consumer Foodservice by Location: % Transaction Growth 2020-2025
- Table 75 - Sales in Consumer Foodservice by Location: % Foodservice Value Growth 2020-2025
- Table 76 - Consumer Foodservice Through Standalone: Units/Outlets 2020-2025
- Table 77 - Sales in Consumer Foodservice Through Standalone: Number of Transactions 2020-2025
- Table 78 - Sales in Consumer Foodservice Through Standalone: Foodservice Value 2020-2025
- Table 79 - Consumer Foodservice Through Standalone: % Units/Outlets Growth 2020-2025
- Table 80 - Sales in Consumer Foodservice Through Standalone: % Transaction Growth 2020-2025
- Table 81 - Sales in Consumer Foodservice Through Standalone: % Foodservice Value Growth 2020-2025
- Table 82 - Consumer Foodservice Through Leisure: Units/Outlets 2020-2025
- Table 83 - Sales in Consumer Foodservice Through Leisure: Number of Transactions 2020-2025
- Table 84 - Sales in Consumer Foodservice Through Leisure: Foodservice Value 2020-2025
- Table 85 - Consumer Foodservice Through Leisure: % Units/Outlets Growth 2020-2025
- Table 86 - Sales in Consumer Foodservice Through Leisure: % Transaction Growth 2020-2025
- Table 87 - Sales in Consumer Foodservice Through Leisure: % Foodservice Value Growth 2020-2025
- Table 88 - Consumer Foodservice Through Retail: Units/Outlets 2020-2025
- Table 89 - Sales in Consumer Foodservice Through Retail: Number of Transactions 2020-2025
- Table 90 - Sales in Consumer Foodservice Through Retail: Foodservice Value 2020-2025
- Table 91 - Consumer Foodservice Through Retail: % Units/Outlets Growth 2020-2025
- Table 92 - Sales in Consumer Foodservice Through Retail: % Transaction Growth 2020-2025
- Table 93 - Sales in Consumer Foodservice Through Retail: % Foodservice Value Growth 2020-2025
- Table 94 - Consumer Foodservice Through Lodging: Units/Outlets 2020-2025
- Table 95 - Sales in Consumer Foodservice Through Lodging: Number of Transactions 2020-2025
- Table 96 - Sales in Consumer Foodservice Through Lodging: Foodservice Value 2020-2025
- Table 97 - Consumer Foodservice Through Lodging: % Units/Outlets Growth 2020-2025
- Table 98 - Sales in Consumer Foodservice Through Lodging: % Transaction Growth 2020-2025
- Table 99 - Sales in Consumer Foodservice Through Lodging: % Foodservice Value Growth 2020-2025
- Table 100 - Consumer Foodservice Through Travel: Units/Outlets 2020-2025
- Table 101 - Sales in Consumer Foodservice Through Travel: Number of Transactions 2020-2025
- Table 102 - Sales in Consumer Foodservice Through Travel: Foodservice Value 2020-2025
- Table 103 - Consumer Foodservice Through Travel: % Units/Outlets Growth 2020-2025
- Table 104 - Sales in Consumer Foodservice Through Travel: % Transaction Growth 2020-2025
- Table 105 - Sales in Consumer Foodservice Through Travel: % Foodservice Value Growth 2020-2025
- Table 106 - Forecast Consumer Foodservice by Location: Units/Outlets 2025-2030
- Table 107 - Forecast Sales in Consumer Foodservice by Location: Number of Transactions 2025-2030
- Table 108 - Forecast Sales in Consumer Foodservice by Location: Foodservice Value 2025-2030
- Table 109 - Forecast Consumer Foodservice by Location: % Units/Outlets Growth 2025-2030
- Table 110 - Forecast Sales in Consumer Foodservice by Location: % Transaction Growth 2025-2030
- Table 111 - Forecast Sales in Consumer Foodservice by Location: % Foodservice Value Growth 2025-2030
- Table 112 - Forecast Consumer Foodservice Through Standalone: Units/Outlets 2025-2030

Table 113 - Forecast Sales in Consumer Foodservice Through Standalone: Number of Transactions 2025-2030  
Table 114 - Forecast Sales in Consumer Foodservice Through Standalone: Foodservice Value 2025-2030  
Table 115 - Forecast Consumer Foodservice Through Standalone: % Units/Outlets Growth 2025-2030  
Table 116 - Forecast Sales in Consumer Foodservice Through Standalone: % Transaction Growth 2025-2030  
Table 117 - Forecast Sales in Consumer Foodservice Through Standalone: % Foodservice Value Growth 2025-2030  
Table 118 - Forecast Consumer Foodservice Through Leisure: Units/Outlets 2025-2030  
Table 119 - Forecast Sales in Consumer Foodservice Through Leisure: Number of Transactions 2025-2030  
Table 120 - Forecast Sales in Consumer Foodservice Through Leisure: Foodservice Value 2025-2030  
Table 121 - Forecast Consumer Foodservice Through Leisure: % Units/Outlets Growth 2025-2030  
Table 122 - Forecast Sales in Consumer Foodservice Through Leisure: % Transaction Growth 2025-2030  
Table 123 - Forecast Sales in Consumer Foodservice Through Leisure: % Foodservice Value Growth 2025-2030  
Table 124 - Forecast Consumer Foodservice Through Retail: Units/Outlets 2025-2030  
Table 125 - Forecast Sales in Consumer Foodservice Through Retail: Number of Transactions 2025-2030  
Table 126 - Forecast Sales in Consumer Foodservice Through Retail: Foodservice Value 2025-2030  
Table 127 - Forecast Consumer Foodservice Through Retail: % Units/Outlets Growth 2025-2030  
Table 128 - Forecast Sales in Consumer Foodservice Through Retail: % Transaction Growth 2025-2030  
Table 129 - Forecast Sales in Consumer Foodservice Through Retail: % Foodservice Value Growth 2025-2030  
Table 130 - Forecast Consumer Foodservice Through Lodging: Units/Outlets 2025-2030  
Table 131 - Forecast Sales in Consumer Foodservice Through Lodging: Number of Transactions 2025-2030  
Table 132 - Forecast Sales in Consumer Foodservice Through Lodging: Foodservice Value 2025-2030  
Table 133 - Forecast Consumer Foodservice Through Lodging: % Units/Outlets Growth 2025-2030  
Table 134 - Forecast Sales in Consumer Foodservice Through Lodging: % Transaction Growth 2025-2030  
Table 135 - Forecast Sales in Consumer Foodservice Through Lodging: % Foodservice Value Growth 2025-2030  
Table 136 - Forecast Consumer Foodservice Through Travel: Units/Outlets 2025-2030  
Table 137 - Forecast Sales in Consumer Foodservice Through Travel: Number of Transactions 2025-2030  
Table 138 - Forecast Sales in Consumer Foodservice Through Travel: Foodservice Value 2025-2030  
Table 139 - Forecast Consumer Foodservice Through Travel: % Units/Outlets Growth 2025-2030  
Table 140 - Forecast Sales in Consumer Foodservice Through Travel: % Transaction Growth 2025-2030  
Table 141 - Forecast Sales in Consumer Foodservice Through Travel: % Foodservice Value Growth 2025-2030

## DISCLAIMER

### About Euromonitor International

Euromonitor International is an independent market intelligence provider. Data, insight and analysis stem from in-the-field research spanning 210 national markets.

Content ranges from the in-depth and country-specific, to key strategic themes with a global range and significance. Products cover a comprehensive range of insights and market data, but can be broadly categorised as:

- **Strategy Briefings:** Global or regional in scope, and focussing on the most important themes shaping consumer demand, the key markets, competitive environment and future outlook across a range of industries.
- **Company Profiles:** Analysis dedicated to the world's most significant companies, with detailed insight into their activities, focus of operations, their competitors, their geographic presence and performance.
- **Country Reports:** For an in-depth understanding of specific countries, whether by industry, economic metrics or consumer trends and lifestyles. These reports cover current trends, consumer demand, market potential and future prospects, with country-specific local insight and comprehensive data, unavailable elsewhere.

For more information on this report, further enquiries can be directed via this link [www.euromonitor.com/consumer-foodservice-in-the-philippines/report](http://www.euromonitor.com/consumer-foodservice-in-the-philippines/report).