



**Euromonitor
International**

Consumer Foodservice By Location in Singapore

March 2026

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KEY DATA FINDINGS

2025 DEVELOPMENTS

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

Standalone locations face mild structural headwinds over the forecast period

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

Demographic changes driven by a growing non-resident population will reshape foodservice demand across locations

COMPETITIVE LANDSCAPE

Scale and accessibility reinforce McDonald's position across non-standalone foodservice

Hawker centres remain the leading operator within standalone locations in 2025, despite mixed operating conditions

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Consumer Foodservice in Singapore - Industry Overview

EXECUTIVE SUMMARY

Stability in a challenging environment

KEY DATA FINDINGS

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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Independents face mounting cost pressures and operational strain
Chains strengthen their competitive advantage through scale, supply coordination and system-led innovation

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