



**Euromonitor
International**

Coffee in Singapore

November 2025

Table of Contents

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

CATEGORY DATA

Table 1 - Retail Sales of Coffee by Category: Volume 2020-2025

Table 2 - Retail Sales of Coffee by Category: Value 2020-2025

Table 3 - Retail Sales of Coffee by Category: % Volume Growth 2020-2025

Table 4 - Retail Sales of Coffee by Category: % Value Growth 2020-2025

Table 5 - Retail Sales of Fresh Ground Coffee Pods by Hard vs Soft: % Volume 2020-2025

Table 6 - NBO Company Shares of Coffee: % Retail Value 2021-2025

Table 7 - LBN Brand Shares of Coffee: % Retail Value 2022-2025

Table 8 - Forecast Retail Sales of Coffee by Category: Volume 2025-2030

Table 9 - Forecast Retail Sales of Coffee by Category: Value 2025-2030

Table 10 - Forecast Retail Sales of Coffee by Category: % Volume Growth 2025-2030

Table 11 - Forecast Retail Sales of Coffee by Category: % Value Growth 2025-2030

COUNTRY REPORTS DISCLAIMER

Hot Drinks in Singapore - Industry Overview

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

MARKET DATA

Table 12 - Sales of Hot Drinks by Retail vs Foodservice: % Volume Breakdown 2020-2025
Table 13 - Sales of Hot Drinks by Retail vs Foodservice: % Volume Growth 2020-2025
Table 14 - Retail Sales of Hot Drinks by Category: Volume 2020-2025
Table 15 - Retail Sales of Hot Drinks by Category: Value 2020-2025
Table 16 - Retail Sales of Hot Drinks by Category: % Volume Growth 2020-2025
Table 17 - Retail Sales of Hot Drinks by Category: % Value Growth 2020-2025
Table 18 - Foodservice Sales of Hot Drinks by Category: Volume 2020-2025
Table 19 - Foodservice Sales of Hot Drinks by Category: % Volume Growth 2020-2025
Table 20 - Total Sales of Hot Drinks by Category: Total Volume 2020-2025
Table 21 - Total Sales of Hot Drinks by Category: % Total Volume Growth 2020-2025
Table 22 - NBO Company Shares of Hot Drinks: % Retail Value 2021-2025
Table 23 - LBN Brand Shares of Hot Drinks: % Retail Value 2022-2025
Table 24 - Penetration of Private Label in Hot Drinks by Category: % Retail Value 2020-2025
Table 25 - Retail Distribution of Hot Drinks by Format: % Volume 2020-2025
Table 26 - Retail Distribution of Hot Drinks by Format and Category: % Volume 2025
Table 27 - Forecast Sales of Hot Drinks by Retail vs Foodservice: % Volume Breakdown 2025-2030
Table 28 - Forecast Sales of Hot Drinks by Retail vs Foodservice: % Volume Growth 2025-2030
Table 29 - Forecast Retail Sales of Hot Drinks by Category: Volume 2025-2030
Table 30 - Forecast Retail Sales of Hot Drinks by Category: Value 2025-2030
Table 31 - Forecast Retail Sales of Hot Drinks by Category: % Volume Growth 2025-2030
Table 32 - Forecast Retail Sales of Hot Drinks by Category: % Value Growth 2025-2030
Table 33 - Forecast Foodservice Sales of Hot Drinks by Category: Volume 2025-2030
Table 34 - Forecast Foodservice Sales of Hot Drinks by Category: % Volume Growth 2025-2030
Table 35 - Forecast Total Sales of Hot Drinks by Category: Total Volume 2025-2030
Table 36 - Forecast Total Sales of Hot Drinks by Category: % Total Volume Growth 2025-2030

COUNTRY REPORTS DISCLAIMER

SOURCES

Summary 1 - Research Sources

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/coffee-in-singapore/report.