



Euromonitor
International

Consumer Foodservice in the Philippines

March 2026

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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
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Major company and brand developments in 2024-2025

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INDUSTRY PERFORMANCE

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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
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KEY DATA FINDINGS

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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
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KEY DATA FINDINGS

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Delivery remains significant as players expand fulfillment scope

WHAT'S NEXT?

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COMPETITIVE LANDSCAPE

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KEY DATA FINDINGS

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Chained outpaces independents in growth terms in 2025

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

WHAT'S NEXT?

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INDUSTRY PERFORMANCE

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WHAT'S NEXT?

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