



Euromonitor
International

Consumer Foodservice By Location in the Philippines

March 2026

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 1 - Consumer Foodservice by Location: Units/Outlets 2020-2025

Table 2 - Sales in Consumer Foodservice by Location: Number of Transactions 2020-2025

Table 3 - Sales in Consumer Foodservice by Location: Foodservice Value 2020-2025

Table 4 - Consumer Foodservice by Location: % Units/Outlets Growth 2020-2025

Table 5 - Sales in Consumer Foodservice by Location: % Transaction Growth 2020-2025

Table 6 - Sales in Consumer Foodservice by Location: % Foodservice Value Growth 2020-2025

Table 7 - Consumer Foodservice Through Standalone: Units/Outlets 2020-2025

Table 8 - Sales in Consumer Foodservice Through Standalone: Number of Transactions 2020-2025

Table 9 - Sales in Consumer Foodservice Through Standalone: Foodservice Value 2020-2025

Table 10 - Consumer Foodservice Through Standalone: % Units/Outlets Growth 2020-2025

Table 11 - Sales in Consumer Foodservice Through Standalone: % Transaction Growth 2020-2025

Table 12 - Sales in Consumer Foodservice Through Standalone: % Foodservice Value Growth 2020-2025

Table 13 - Consumer Foodservice Through Leisure: Units/Outlets 2020-2025

Table 14 - Sales in Consumer Foodservice Through Leisure: Number of Transactions 2020-2025

Table 15 - Sales in Consumer Foodservice Through Leisure: Foodservice Value 2020-2025

Table 16 - Consumer Foodservice Through Leisure: % Units/Outlets Growth 2020-2025

Table 17 - Sales in Consumer Foodservice Through Leisure: % Transaction Growth 2020-2025

Table 18 - Sales in Consumer Foodservice Through Leisure: % Foodservice Value Growth 2020-2025

Table 19 - Consumer Foodservice Through Retail: Units/Outlets 2020-2025

Table 20 - Sales in Consumer Foodservice Through Retail: Number of Transactions 2020-2025

Table 21 - Sales in Consumer Foodservice Through Retail: Foodservice Value 2020-2025

Table 22 - Consumer Foodservice Through Retail: % Units/Outlets Growth 2020-2025

Table 23 - Sales in Consumer Foodservice Through Retail: % Transaction Growth 2020-2025

Table 24 - Sales in Consumer Foodservice Through Retail: % Foodservice Value Growth 2020-2025

Table 25 - Consumer Foodservice Through Lodging: Units/Outlets 2020-2025

Table 26 - Sales in Consumer Foodservice Through Lodging: Number of Transactions 2020-2025

Table 27 - Sales in Consumer Foodservice Through Lodging: Foodservice Value 2020-2025

Table 28 - Consumer Foodservice Through Lodging: % Units/Outlets Growth 2020-2025

Table 29 - Sales in Consumer Foodservice Through Lodging: % Transaction Growth 2020-2025

Table 30 - Sales in Consumer Foodservice Through Lodging: % Foodservice Value Growth 2020-2025

Table 31 - Consumer Foodservice Through Travel: Units/Outlets 2020-2025

Table 32 - Sales in Consumer Foodservice Through Travel: Number of Transactions 2020-2025

Table 33 - Sales in Consumer Foodservice Through Travel: Foodservice Value 2020-2025

Table 34 - Consumer Foodservice Through Travel: % Units/Outlets Growth 2020-2025

Table 35 - Sales in Consumer Foodservice Through Travel: % Transaction Growth 2020-2025

Table 36 - Sales in Consumer Foodservice Through Travel: % Foodservice Value Growth 2020-2025

Table 37 - Forecast Consumer Foodservice by Location: Units/Outlets 2025-2030

Table 38 - Forecast Sales in Consumer Foodservice by Location: Number of Transactions 2025-2030

Table 39 - Forecast Sales in Consumer Foodservice by Location: Foodservice Value 2025-2030

Table 40 - Forecast Consumer Foodservice by Location: % Units/Outlets Growth 2025-2030

Table 41 - Forecast Sales in Consumer Foodservice by Location: % Transaction Growth 2025-2030

Table 42 - Forecast Sales in Consumer Foodservice by Location: % Foodservice Value Growth 2025-2030

Table 43 - Forecast Consumer Foodservice Through Standalone: Units/Outlets 2025-2030

Table 44 - Forecast Sales in Consumer Foodservice Through Standalone: Number of Transactions 2025-2030

Table 45 - Forecast Sales in Consumer Foodservice Through Standalone: Foodservice Value 2025-2030

Table 46 - Forecast Consumer Foodservice Through Standalone: % Units/Outlets Growth 2025-2030

Table 47 - Forecast Sales in Consumer Foodservice Through Standalone: % Transaction Growth 2025-2030

Table 48 - Forecast Sales in Consumer Foodservice Through Standalone: % Foodservice Value Growth 2025-2030

Table 49 - Forecast Consumer Foodservice Through Leisure: Units/Outlets 2025-2030

Table 50 - Forecast Sales in Consumer Foodservice Through Leisure: Number of Transactions 2025-2030

Table 51 - Forecast Sales in Consumer Foodservice Through Leisure: Foodservice Value 2025-2030

Table 52 - Forecast Consumer Foodservice Through Leisure: % Units/Outlets Growth 2025-2030

Table 53 - Forecast Sales in Consumer Foodservice Through Leisure: % Transaction Growth 2025-2030

Table 54 - Forecast Sales in Consumer Foodservice Through Leisure: % Foodservice Value Growth 2025-2030

Table 55 - Forecast Consumer Foodservice Through Retail: Units/Outlets 2025-2030

Table 56 - Forecast Sales in Consumer Foodservice Through Retail: Number of Transactions 2025-2030

Table 57 - Forecast Sales in Consumer Foodservice Through Retail: Foodservice Value 2025-2030

Table 58 - Forecast Consumer Foodservice Through Retail: % Units/Outlets Growth 2025-2030

Table 59 - Forecast Sales in Consumer Foodservice Through Retail: % Transaction Growth 2025-2030

Table 60 - Forecast Sales in Consumer Foodservice Through Retail: % Foodservice Value Growth 2025-2030

Table 61 - Forecast Consumer Foodservice Through Lodging: Units/Outlets 2025-2030

Table 62 - Forecast Sales in Consumer Foodservice Through Lodging: Number of Transactions 2025-2030

Table 63 - Forecast Sales in Consumer Foodservice Through Lodging: Foodservice Value 2025-2030

Table 64 - Forecast Consumer Foodservice Through Lodging: % Units/Outlets Growth 2025-2030

Table 65 - Forecast Sales in Consumer Foodservice Through Lodging: % Transaction Growth 2025-2030

Table 66 - Forecast Sales in Consumer Foodservice Through Lodging: % Foodservice Value Growth 2025-2030

Table 67 - Forecast Consumer Foodservice Through Travel: Units/Outlets 2025-2030

Table 68 - Forecast Sales in Consumer Foodservice Through Travel: Number of Transactions 2025-2030

Table 69 - Forecast Sales in Consumer Foodservice Through Travel: Foodservice Value 2025-2030

Table 70 - Forecast Consumer Foodservice Through Travel: % Units/Outlets Growth 2025-2030

Table 71 - Forecast Sales in Consumer Foodservice Through Travel: % Transaction Growth 2025-2030

Table 72 - Forecast Sales in Consumer Foodservice Through Travel: % Foodservice Value Growth 2025-2030

DISCLAIMER

Consumer Foodservice in the Philippines - Industry Overview

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 73 - Units, Transactions and Value Sales in Consumer Foodservice 2020-2025
Table 74 - Units, Transactions and Value Sales in Consumer Foodservice: % Growth 2020-2025
Table 75 - Consumer Foodservice by Independent vs Chained by Type: Units/Outlets 2025
Table 76 - Consumer Foodservice by Independent vs Chained: % Foodservice Value 2020-2025
Table 77 - Sales in Consumer Foodservice by Food vs Drink Split: % Foodservice Value 2020-2025
Table 78 - Sales in Consumer Foodservice by Food vs Drink Split by Type: % Foodservice Value 2025
Table 79 - Sales in Consumer Foodservice by Location: % Foodservice Value 2020-2025
Table 80 - Sales in Consumer Foodservice by Fulfillment: % Foodservice Value 2020-2025
Table 81 - GBO Company Shares in Chained Consumer Foodservice: % Foodservice Value 2021-2025
Table 82 - GBN Brand Shares in Chained Consumer Foodservice: % Foodservice Value 2022-2025
Table 83 - GBN Brand Shares in Chained Consumer Foodservice: Units/Outlets 2025
Table 84 - Forecast Units, Transactions and Value Sales in Consumer Foodservice 2025-2030
Table 85 - Forecast Units, Transactions and Value Sales in Consumer Foodservice: % Growth 2025-2030

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/consumer-foodservice-by-location-in-the-philippines/report.