

Consumer Foodservice in the Philippines

February 2024

Table of Contents

Consumer Foodservice in the Philippines

EXECUTIVE SUMMARY

Consumer foodservice in 2023: The big picture

2023 key trends

Competitive landscape

Independent foodservice developments

What next for consumer foodservice?

MARKET DATA

- Table 1 Units, Transactions and Value Sales in Consumer Foodservice 2018-2023
- Table 2 Units, Transactions and Value Sales in Consumer Foodservice: % Growth 2018-2023
- Table 3 Consumer Foodservice by Independent vs Chained by Type: Units/Outlets 2023
- Table 4 Consumer Foodservice by Independent vs Chained: % Foodservice Value 2018-2023
- Table 5 Sales in Consumer Foodservice by Food vs Drink Split: % Foodservice Value 2018-2023
- Table 6 Sales in Consumer Foodservice by Food vs Drink Split by Type: % Foodservice Value 2023
- Table 7 Sales in Consumer Foodservice by Location: % Foodservice Value 2018-2023
- Table 8 Sales in Consumer Foodservice by Fulfillment: % Foodservice Value 2018-2023
- Table 9 GBO Company Shares in Chained Consumer Foodservice: % Foodservice Value 2019-2023
- Table 10 GBN Brand Shares in Chained Consumer Foodservice: % Foodservice Value 2020-2023
- Table 11 GBN Brand Shares in Chained Consumer Foodservice: Units/Outlets 2023
- Table 12 Forecast Units, Transactions and Value Sales in Consumer Foodservice 2023-2028
- Table 13 Forecast Units, Transactions and Value Sales in Consumer Foodservice: % Growth 2023-2028

DISCLAIMER

SOURCES

Summary 1 - Research Sources

Cafés/Bars in the Philippines

KEY DATA FINDINGS

2023 DEVELOPMENTS

Increase in consumer mobility sustains growth

New brands and players enter the market

Affordable coffee is on the rise, driven by grab-and-go start-ups

PROSPECTS AND OPPORTUNITIES

Players will explore new formats

Starbucks will continue to lead the category, amid increasing competition from smaller players

Convenience stores could pose a threat to coffee shops

CATEGORY DATA

- Table 14 Cafés/Bars by Category: Units/Outlets 2018-2023
- Table 15 Sales in Cafés/Bars by Category: Number of Transactions 2018-2023
- Table 16 Sales in Cafés/Bars by Category: Foodservice Value 2018-2023
- Table 17 Cafés/Bars by Category: % Units/Outlets Growth 2018-2023
- Table 18 Sales in Cafés/Bars by Category: % Transaction Growth 2018-2023
- Table 19 Sales in Cafés/Bars by Category: % Foodservice Value Growth 2018-2023
- Table 20 GBO Company Shares in Chained Cafés/Bars: % Foodservice Value 2019-2023
- Table 21 GBN Brand Shares in Chained Cafés/Bars: % Foodservice Value 2020-2023
- Table 22 Forecast Cafés/Bars by Category: Units/Outlets 2023-2028
- Table 23 Forecast Sales in Cafés/Bars by Category: Number of Transactions 2023-2028

- Table 24 Forecast Sales in Cafés/Bars by Category: Foodservice Value 2023-2028
- Table 25 Forecast Cafés/Bars by Category: % Units/Outlets Growth 2023-2028
- Table 26 Forecast Sales in Cafés/Bars by Category: % Transaction Growth 2023-2028
- Table 27 Forecast Sales in Cafés/Bars by Category: % Foodservice Value Growth 2023-2028

Full-Service Restaurants in the Philippines

KEY DATA FINDINGS

2023 DEVELOPMENTS

Players invest in various strategies to counter impact of inflation

Third-party delivery operators continue to play crucial role in generating sales

Cloud kitchen concept continues to expand

PROSPECTS AND OPPORTUNITIES

Continued growth, as players look to expand into untapped geographical areas

Consumers will continue seek out safe and convenient dining experiences

Continued focus on home delivery

CATEGORY DATA

- Table 28 Full-Service Restaurants by Category: Units/Outlets 2018-2023
- Table 29 Sales in Full-Service Restaurants by Category: Number of Transactions 2018-2023
- Table 30 Sales in Full-Service Restaurants by Category: Foodservice Value 2018-2023
- Table 31 Full-Service Restaurants by Category: % Units/Outlets Growth 2018-2023
- Table 32 Sales in Full-Service Restaurants by Category: % Transaction Growth 2018-2023
- Table 33 Sales in Full-Service Restaurants by Category: % Foodservice Value Growth 2018-2023
- Table 34 GBO Company Shares in Chained Full-Service Restaurants: % Foodservice Value 2019-2023
- Table 35 GBN Brand Shares in Chained Full-Service Restaurants: % Foodservice Value 2020-2023
- Table 36 Forecast Full-Service Restaurants by Category: Units/Outlets 2023-2028
- Table 37 Forecast Sales in Full-Service Restaurants by Category: Number of Transactions 2023-2028
- Table 38 Forecast Sales in Full-Service Restaurants by Category: Foodservice Value 2023-2028
- Table 39 Forecast Full-Service Restaurants by Category: % Units/Outlets Growth 2023-2028
- Table 40 Forecast Sales in Full-Service Restaurants by Category: % Transaction Growth 2023-2028
- Table 41 Forecast Sales in Full-Service Restaurants by Category: % Foodservice Value Growth 2023-2028

Limited-Service Restaurants in the Philippines

KEY DATA FINDINGS

2023 DEVELOPMENTS

Continued strong performance in 2023, despite impact of inflation

Players invest in various strategies to sustain growth, including expanding into previously untapped areas and offering more value-for-money option Philippines represents attractive launch pad for new players

PROSPECTS AND OPPORTUNITIES

Better economic conditions will have positive impact on sales

Digital marketing strategies will be instrumental in attracting new audiences

Players will need to manage impact of external factors

CATEGORY DATA

- Table 42 Limited-Service Restaurants by Category: Units/Outlets 2018-2023
- Table 43 Sales in Limited-Service Restaurants by Category: Number of Transactions 2018-2023
- Table 44 Sales in Limited-Service Restaurants by Category: Foodservice Value 2018-2023
- Table 45 Limited-Service Restaurants by Category: % Units/Outlets Growth 2018-2023

- Table 46 Sales in Limited-Service Restaurants by Category: % Transaction Growth 2018-2023
- Table 47 Sales in Limited-Service Restaurants by Category: % Foodservice Value Growth 2018-2023
- Table 48 GBO Company Shares in Chained Limited-Service Restaurants: % Foodservice Value 2019-2023
- Table 49 GBN Brand Shares in Chained Limited-Service Restaurants: % Foodservice Value 2020-2023
- Table 50 Forecast Limited-Service Restaurants by Category: Units/Outlets 2023-2028
- Table 51 Forecast Sales in Limited-Service Restaurants by Category: Number of Transactions 2023-2028
- Table 52 Forecast Sales in Limited-Service Restaurants by Category: Foodservice Value 2023-2028
- Table 53 Forecast Limited-Service Restaurants by Category: % Units/Outlets Growth 2023-2028
- Table 54 Forecast Sales in Limited-Service Restaurants by Category: % Transaction Growth 2023-2028
- Table 55 Forecast Sales in Limited-Service Restaurants by Category: % Foodservice Value Growth 2023-2028

Street Stalls/Kiosks in the Philippines

KEY DATA FINDINGS

2023 DEVELOPMENTS

Recovery driven by return of foot traffic and expansion into channels

On-the-go coffee satisfies consumer need for affordability and convenience

Milk tea and frozen yoghurt are popular staples

PROSPECTS AND OPPORTUNITIES

Ongoing popularity of milk tea and grab-and-go coffee kiosk format will fuel further growth

Players will build their digital presence

Franchising will continue to propel the category

CATEGORY DATA

- Table 56 Street Stalls/Kiosks: Units/Outlets 2018-2023
- Table 57 Sales in Street Stalls/Kiosks: Number of Transactions 2018-2023
- Table 58 Sales in Street Stalls/Kiosks: Foodservice Value 2018-2023
- Table 59 Street Stalls/Kiosks: % Units/Outlets Growth 2018-2023
- Table 60 Sales in Street Stalls/Kiosks: % Transaction Growth 2018-2023
- Table 61 Sales in Street Stalls/Kiosks: % Foodservice Value Growth 2018-2023
- Table 62 GBO Company Shares in Chained Street Stalls/Kiosks: % Foodservice Value 2019-2023
- Table 63 GBN Brand Shares in Chained Street Stalls/Kiosks: % Foodservice Value 2020-2023
- Table 64 Forecast Street Stalls/Kiosks: Units/Outlets 2023-2028
- Table 65 Forecast Sales in Street Stalls/Kiosks: Number of Transactions 2023-2028
- Table 66 Forecast Sales in Street Stalls/Kiosks: Foodservice Value 2023-2028
- Table 67 Forecast Street Stalls/Kiosks: % Units/Outlets Growth 2023-2028
- Table 68 Forecast Sales in Street Stalls/Kiosks: % Transaction Growth 2023-2028
- Table 69 Forecast Sales in Street Stalls/Kiosks: % Foodservice Value Growth 2023-2028

Consumer Foodservice By Location in the Philippines

KEY DATA FINDINGS

2023 DEVELOPMENTS

Retail locations benefit from increase in footfall in shopping malls Revenge travel sparks growth in travel, lodging and leisure locations Standalone outlets see strong performance

PROSPECTS AND OPPORTUNITIES

More retail spaces expected, as real estate companies expand into unserved areas

Foodservice in travel locations will continue to recover, while more stand-alone outlets are likely to emerge

Foodservice players will continue to explore additional formats to expand reach

CATEGORY DATA

- Table 70 Consumer Foodservice by Location: Units/Outlets 2018-2023
- Table 71 Sales in Consumer Foodservice by Location: Number of Transactions 2018-2023
- Table 72 Sales in Consumer Foodservice by Location: Foodservice Value 2018-2023
- Table 73 Consumer Foodservice by Location: % Units/Outlets Growth 2018-2023
- Table 74 Sales in Consumer Foodservice by Location: % Transaction Growth 2018-2023
- Table 75 Sales in Consumer Foodservice by Location: % Foodservice Value Growth 2018-2023
- Table 76 Consumer Foodservice through Standalone: Units/Outlets 2018-2023
- Table 77 Sales in Consumer Foodservice through Standalone: Number of Transactions 2018-2023
- Table 78 Sales in Consumer Foodservice through Standalone: Foodservice Value 2018-2023
- Table 79 Consumer Foodservice through Standalone: % Units/Outlets Growth 2018-2023
- Table 80 Sales in Consumer Foodservice through Standalone: % Transaction Growth 2018-2023
- Table 81 Sales in Consumer Foodservice through Standalone: % Foodservice Value Growth 2018-2023
- Table 82 Consumer Foodservice through Leisure: Units/Outlets 2018-2023
- Table 83 Sales in Consumer Foodservice through Leisure: Number of Transactions 2018-2023
- Table 84 Sales in Consumer Foodservice through Leisure: Foodservice Value 2018-2023
- Table 85 Consumer Foodservice through Leisure: % Units/Outlets Growth 2018-2023
- Table 86 Sales in Consumer Foodservice through Leisure: % Transaction Growth 2018-2023
- Table 87 Sales in Consumer Foodservice through Leisure: % Foodservice Value Growth 2018-2023
- Table 88 Consumer Foodservice through Retail: Units/Outlets 2018-2023
- Table 89 Sales in Consumer Foodservice through Retail: Number of Transactions 2018-2023
- Table 90 Sales in Consumer Foodservice through Retail: Foodservice Value 2018-2023
- Table 91 Consumer Foodservice through Retail: % Units/Outlets Growth 2018-2023
- Table 92 Sales in Consumer Foodservice through Retail: % Transaction Growth 2018-2023
- Table 93 Sales in Consumer Foodservice through Retail: % Foodservice Value Growth 2018-2023
- Table 94 Consumer Foodservice through Lodging: Units/Outlets 2018-2023
- Table 95 Sales in Consumer Foodservice through Lodging: Number of Transactions 2018-2023
- Table 96 Sales in Consumer Foodservice through Lodging: Foodservice Value 2018-2023
- Table 97 Consumer Foodservice through Lodging: % Units/Outlets Growth 2018-2023
- Table 98 Sales in Consumer Foodservice through Lodging: % Transaction Growth 2018-2023
- Table 99 Sales in Consumer Foodservice through Lodging: % Foodservice Value Growth 2018-2023
- Table 100 Consumer Foodservice through Travel: Units/Outlets 2018-2023
- Table 101 Sales in Consumer Foodservice through Travel: Number of Transactions 2018-2023
- Table 102 Sales in Consumer Foodservice through Travel: Foodservice Value 2018-2023
- Table 103 Consumer Foodservice through Travel: % Units/Outlets Growth 2018-2023
- Table 104 Sales in Consumer Foodservice through Travel: % Transaction Growth 2018-2023
- Table 105 Sales in Consumer Foodservice through Travel: % Foodservice Value Growth 2018-2023
- Table 106 Forecast Consumer Foodservice by Location: Units/Outlets 2023-2028
- Table 107 Forecast Sales in Consumer Foodservice by Location: Number of Transactions 2023-2028
- Table 108 Forecast Sales in Consumer Foodservice by Location: Foodservice Value 2023-2028
- Table 109 Forecast Consumer Foodservice by Location: % Units/Outlets Growth 2023-2028
- Table 110 Forecast Sales in Consumer Foodservice by Location: % Transaction Growth 2023-2028
- Table 111 Forecast Sales in Consumer Foodservice by Location: % Foodservice Value Growth 2023-2028
- Table 112 Forecast Consumer Foodservice through Standalone: Units/Outlets 2023-2028
- Table 113 Forecast Sales in Consumer Foodservice through Standalone: Number of Transactions 2023-2028
- Table 114 Forecast Sales in Consumer Foodservice through Standalone: Foodservice Value 2023-2028
- Table 115 Forecast Consumer Foodservice through Standalone: % Units/Outlets Growth 2023-2028
- Table 116 Forecast Sales in Consumer Foodservice through Standalone: % Transaction Growth 2023-2028
- Table 117 Forecast Sales in Consumer Foodservice through Standalone: % Foodservice Value Growth 2023-2028
- Table 118 Forecast Consumer Foodservice through Leisure: Units/Outlets 2023-2028
- Table 119 Forecast Sales in Consumer Foodservice through Leisure: Number of Transactions 2023-2028
- Table 120 Forecast Sales in Consumer Foodservice through Leisure: Foodservice Value 2023-2028

- Table 121 Forecast Consumer Foodservice through Leisure: % Units/Outlets Growth 2023-2028
- Table 122 Forecast Sales in Consumer Foodservice through Leisure: % Transaction Growth 2023-2028
- Table 123 Forecast Sales in Consumer Foodservice through Leisure: % Foodservice Value Growth 2023-2028
- Table 124 Forecast Consumer Foodservice through Retail: Units/Outlets 2023-2028
- Table 125 Forecast Sales in Consumer Foodservice through Retail: Number of Transactions 2023-2028
- Table 126 Forecast Sales in Consumer Foodservice through Retail: Foodservice Value 2023-2028
- Table 127 Forecast Consumer Foodservice through Retail: % Units/Outlets Growth 2023-2028
- Table 128 Forecast Sales in Consumer Foodservice through Retail: % Transaction Growth 2023-2028
- Table 129 Forecast Sales in Consumer Foodservice through Retail: % Foodservice Value Growth 2023-2028
- Table 130 Forecast Consumer Foodservice through Lodging: Units/Outlets 2023-2028
- Table 131 Forecast Sales in Consumer Foodservice through Lodging: Number of Transactions 2023-2028
- Table 132 Forecast Sales in Consumer Foodservice through Lodging: Foodservice Value 2023-2028
- Table 133 Forecast Consumer Foodservice through Lodging: % Units/Outlets Growth 2023-2028
- Table 134 Forecast Sales in Consumer Foodservice through Lodging: % Transaction Growth 2023-2028
- Table 135 Forecast Sales in Consumer Foodservice through Lodging: % Foodservice Value Growth 2023-2028
- Table 136 Forecast Consumer Foodservice through Travel: Units/Outlets 2023-2028
- Table 137 Forecast Sales in Consumer Foodservice through Travel: Number of Transactions 2023-2028
- Table 138 Forecast Sales in Consumer Foodservice through Travel: Foodservice Value 2023-2028
- Table 139 Forecast Consumer Foodservice through Travel: % Units/Outlets Growth 2023-2028
- Table 140 Forecast Sales in Consumer Foodservice through Travel: % Transaction Growth 2023-2028
- Table 141 Forecast Sales in Consumer Foodservice through Travel: % Foodservice Value Growth 2023-2028

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 focusing 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.