



Limited-Service Restaurants in Singapore

March 2026

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KEY DATA FINDINGS

2025 DEVELOPMENTS

Value and localisation

INDUSTRY PERFORMANCE

Value-driven growth in limited-service restaurants

Rising competition and consumer shifts in the fried chicken category

Collaborations as a value-driven strategy in limited-service restaurants

WHAT'S NEXT?

Positive outlook for limited-service restaurants

Evolution of fulfilment in limited-service restaurants

Technology as a driver for cost management in limited-service restaurants

COMPETITIVE LANDSCAPE

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Consumer Foodservice in Singapore - Industry Overview

EXECUTIVE SUMMARY

Stability in a challenging environment

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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

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