Euromonitor International

# Staple Foods in Singapore

November 2025

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## Staple Foods in Singapore


EXECUTIVE SUMMARY

Premiumisation and innovation amidst maturity spur retail value over volume sales growth

KEY DATA FINDINGS

INDUSTRY PERFORMANCE

Dried pasta and muesli and granola see the highest growth in retail value sales
Premiumisation and flavour profiles stimulate baked goods and instant noodles
Convenience underpins new launches in baked goods and frozen processed poultry

WHAT'S NEXT?

State support and new entries offer growth opportunities
New offerings to cater to an increasingly health-conscious consumer base
The foodservice tie-up is expected to remain a key strategy

COMPETITIVE LANDSCAPE

PSC Corp leverages strength in tofu to lead staple foods
Shift in dietary preferences boosts the performance of Weetabix's Alpen

CHANNELS

Supermarkets develop through digitalisation, strategic partnerships and value propositions
Functionality, accessibility and safety improvements are behind e-commerce's strong retail value sales growth

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2025 DEVELOPMENTS

Premiumisation drives the category

INDUSTRY PERFORMANCE

Bread remains a versatile, essential item in local households
Fresh, premium demand spurs shift to unpackaged cakes

WHAT'S NEXT?

Urban lifestyles favour on-the-go options
Health and wellness to drive reformulations and new product launches
Foodservice is predicted to remain a cornerstone of baked goods

COMPETITIVE LANDSCAPE

Gardenia Foods continues to lead through its strength in leavened bread
Lotte Choco Pie fits with indulgence and convenience trends to gain momentum

CHANNELS

Food specialists dominate distribution with fresh, premium baked goods offers
Vibrant bakery café scene provides fertile ground for new and exciting offerings

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KEY DATA FINDINGS

2025 DEVELOPMENTS

Breakfast cereals develops as a category in retail and foodservice spaces

INDUSTRY PERFORMANCE

Demographic trends inform sales development in breakfast cereals
Rising popularity of muesli and granola reflects a shift to healthier and more natural options

WHAT'S NEXT?

Muesli and granola to gain ground on children's breakfast cereals
Wellness trends to drive innovation in breakfast cereals in the forecast period
Foodservice trends expand consumption occasions for muesli and granola

COMPETITIVE LANDSCAPE

Nestlé invests in its strong stable to lead the field
Alpen is perceived as a better for you alternative to sugary breakfast cereals

CHANNELS

Wide store presence, large product offer and pricing strategies maintain the appeal of supermarkets
E-commerce offers convenience and value for money deals to win over consumers

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KEY DATA FINDINGS

2025 DEVELOPMENTS

Weak growth in demand in a mature category

INDUSTRY PERFORMANCE

Convenience and practicality favour the shelf stable format
Frozen processed potatoes enjoys healthy retail value growth although demand stabilises

WHAT'S NEXT?

Frozen processed fruit and vegetables to benefit from an alignment with modern lifestyles that value convenience and nutrition retention
Frozen fruit to gain traction in availability
Foodservice to remain a crucial channel for processed fruit and vegetables

COMPETITIVE LANDSCAPE

Wide product range and strong distribution keep Mili ahead of the field
Price and distribution advantages boost FairPrice

CHANNELS

Wide availability and large assortments make supermarkets popular
Strong online development provides e-commerce with a competitive edge in the distribution of processed fruit and vegetables

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KEY DATA FINDINGS

2025 DEVELOPMENTS

Maturity constrains growth potential

INDUSTRY PERFORMANCE

Frozen processed poultry and tofu benefit from convenience, novelties and local culinary preferences
Food innovation and a young adult audience provide fertile ground for growth for meat and seafood substitutes

WHAT'S NEXT?

Moderate growth anticipated due to maturity and the limited pace of innovation within core categories
Health and wellness to continue to shape innovation within processed meat, seafood and alternatives to meat
Meat and seafood substitutes face headwinds in the forecast period but new entrants can offer dynamism

COMPETITIVE LANDSCAPE

PSC Corp benefits from the high popularity of tofu in the local cuisine
Monde Nissin Corp invests to make gains

CHANNELS

Convenience and a comprehensive offer underpin supermarkets' dominance
Supermarkets are set up to provide strong processed meat and seafood distribution

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Rice, Pasta and Noodles in Singapore

KEY DATA FINDINGS

2025 DEVELOPMENTS

Premiumisation lifts retail value sales as consumer preferences become more sophisticated

INDUSTRY PERFORMANCE

Rice dominates but instant noodles sees significant new product development
Rising interest in Western-style cooking and premiumisation spur dried pasta

WHAT'S NEXT?

A level of maturity in key categories is set to constrain the overall growth trajectory
Nutri-Grade labelling and advertising regulations to be extended to a range of food items, including instant noodles
Foodservice tie-ups to remain a key way to drive consumer engagement and momentum

COMPETITIVE LANDSCAPE

The leading brand's offer is strengthened by product innovation in 2025
Private label underpins the performance of NTUC FairPrice Co-operative

CHANNELS

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