



Coffee in Singapore

November 2025

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KEY DATA FINDINGS

2025 DEVELOPMENTS

Prices continue to rise, which hampers retail volume growth but drives value sales

INDUSTRY PERFORMANCE

Rising costs reshape consumer priorities, although the premium segment still grows

Demand for convenient café-style solutions drives growth for coffee pods

WHAT'S NEXT?

Growth ahead, but pricing strains are expected to reshape value expectations

Technology will continue to redefine coffee consumption through personalisation and efficiency

Wellness and sustainability must deliver without the premium price tag

COMPETITIVE LANDSCAPE

Innovation and sustainability prove relevant even under price pressure

Jacobs Douwe Egberts performs well by focusing on wellbeing and sustainability

CHANNELS

Supermarkets maintains its dominance as affordability and familiarity are paramount

Tailored experiences and transparent pricing drive growth for retail e-commerce

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Hot Drinks in Singapore - Industry Overview

EXECUTIVE SUMMARY

Premiumisation, price rises, and health all impact retail value sales

KEY DATA FINDINGS

INDUSTRY PERFORMANCE

Value growth driven by price rises and rising demand for healthy variants

Coffee sees value dynamism due to premiumisation

Cost-effective foodservice outlets offering convenience and personalisation succeed

Sustainability must be affordable, and an integral part of the offering

Wellness is a mainstream trend, and products need to align with health objectives

WHAT'S NEXT?

Continued retail value growth, driven by premiumisation and functional variants

Innovation will be important, but must come alongside affordability
Distribution expected to continue to move towards retail e-commerce

COMPETITIVE LANDSCAPE

Nestlé extends its dominance, driven by innovation and quality
ITO EN sees dynamic growth thanks to its focus on matcha products
Experiential consumption is important in Singapore

CHANNELS

Consumers still prefer supermarkets, as a trusted distribution channel
Retail e-commerce sees dynamism – particularly favoured by health-conscious consumers
Foodservice volume share rises as consumers look for personalisation and experiences

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