

2024 / 2025

Food Services Productivity Report





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01 Introduction

The Singapore Productivity Centre (SGPC) was established in 2013 under the aegis of the Future Economy Council (formerly known as the National Productivity Council), with the support of Enterprise Singapore (EnterpriseSG). As the national competency centre, SGPC supports enterprises in various sectors such as Food Services, Retail, and Hotel to innovate, transform, and grow in a future-ready manner.



SGPC provides in-depth productivity consultancy, customised workshops, and access to a comprehensive resource centre featuring case studies, applied research, and benchmarking tools.

One key initiative, supported by EnterpriseSG, is the Food Services Productivity Report to enable companies to assess their productivity performance against sector averages and top-performing peers. Businesses can then identify strengths, uncover gaps, and develop actionable plans to improve efficiency and long-term competitiveness.

02 Executive Summary

The Food & Beverage (F&B) sector is a key pillar of Singapore’s economy — both as a major employer and a vital part of the nation’s cultural and social fabric. Increasingly, the sector faces structural challenges such as stagnant productivity, rising costs, intense competition, and labour constraints due to an ageing workforce. The Food Services Productivity Report aims to help F&B businesses enhance efficiency and stay competitive by identifying productivity gaps and best practices.

The Report highlights three core metrics below to benchmark F&B productivity:

1



SALES PER MAN-HOUR
Key operational and performance benchmark that resonates with the sector

2



SALES PER SQUARE FOOT
Key indicator of space efficiency

3



MANPOWER RATIO
Key indicator of manpower efficiency

Three Key Insights



A typical F&B outlet generates between \$60 to \$65 per man-hour worked.



Businesses which are manpower efficient are also likely space efficient.



No sub-sector performed significantly worse, but there is a gap between top performers and underperformers.

Five Best Practices



Embracing Digitalisation and Automation



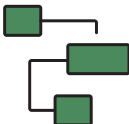
Maximising Productivity Through Outsourcing



Strategic Menu Design for Efficiency and Margin



Productivity Starts with Right People and Cohesive Teams



Better Process Design to Streamline Workflow and Space for Multiplying Gains

Overview of F&B Sector in Singapore

A key economic contributor facing a slow post-COVID recovery

F&B Sector: A Vital Pillar of Singapore's Economy and Culture



As one of the largest employers in the services sector, the F&B sector's value extends far beyond its direct economic contributions. The sector is deeply integrated into the social and cultural fabric of the nation, shaping Singapore's identity and enhancing its global reputation as a vibrant, multicultural food destination. Through its diversity of offerings, it not only fuels consumption and job creation but also enriches daily life and community connections.

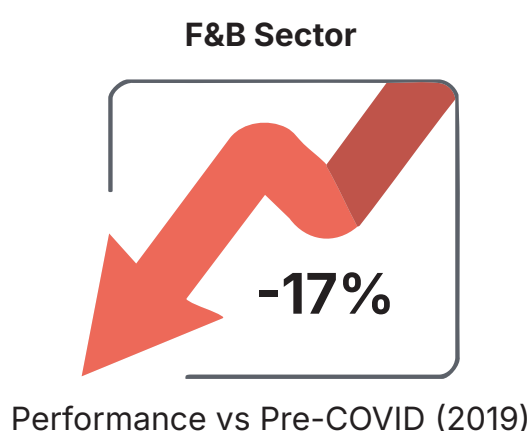
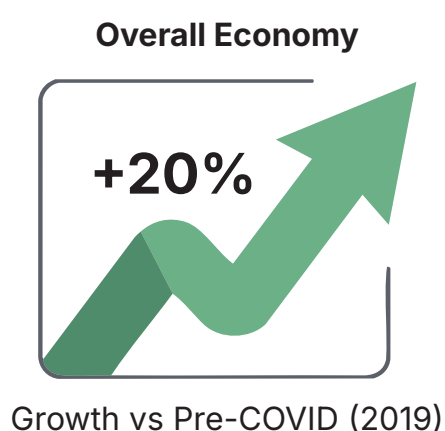
¹ Ministry of Manpower - Annual Employment Level By Industry

² Ministry of Trade and Industry Singapore - Economic Survey Of Singapore 2024

Gradual Recovery in a Post-COVID Landscape

While Singapore's overall economy has made a strong post-pandemic recovery, the rebound in the F&B sector has been more gradual.

By 2024, the nation's GDP rose to S\$561.9 billion - approximately 1.2 times its pre-COVID level in 2019 - in Chained (2015) dollars. In contrast, the F&B sector, despite showing signs of improvement, recorded an output of nearly S\$4.4 billion in 2024, falling short of its 2019 level of S\$5.3 billion³. This underscores how the pandemic has accentuated pre-existing structural challenges within the sector.

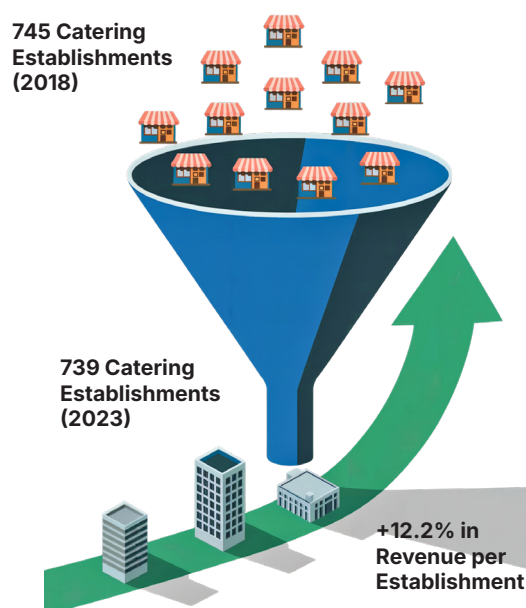


However, not all F&B subsectors recovered at the same pace. The catering segment has demonstrated a strong rebound, underpinned by a leaner industry structure and growing demand from events and institutional clients.

Snapshot of Catering Segment

This structural shift towards higher productivity, where fewer operators are generating greater output, was driven by several key factors:

- Automation: Adopting new technologies to improve efficiency and streamline operations.
- Resource Optimisation: More effective use of both labour and capital.
- Enhanced Scalability: A better ability to respond to the resurgence of large-scale institutional and event-based demand.



³ Singapore Department of Statistics - Gross Domestic Product in Chained (2015) Dollars, By Industry (SSIC 2020), Annual

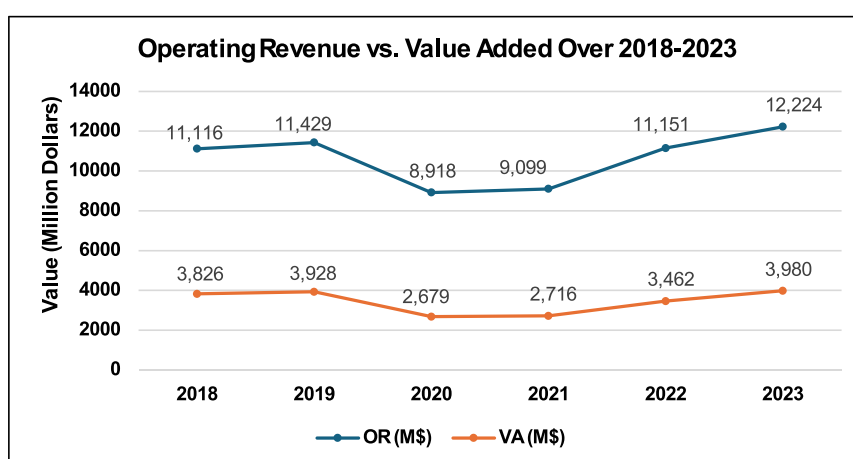
Key Challenges

Faced by Singapore's F&B Sector

Productivity Gap Widens in Growing Sector

As of 2023, Singapore's F&B sector comprised over 15,700 establishments across various formats, including restaurants, cafés, food kiosks, fast food outlets, food courts, pubs, and caterers⁴. However, growth in the sector has outpaced productivity gains. From 2018 to 2023, topline growth - measured by operating revenue - increased by nearly 10%, while the sector's value-added contribution grew by only 4%, highlighting a persistent productivity gap⁵.

Figure 1. Trends in Operating Revenue and Value Added, 2018-2023



Note: OR = Operating Revenue, VA = Value Added

Source: Singstat – Key Indicators by Detailed Industry in All Services Industries, Annual

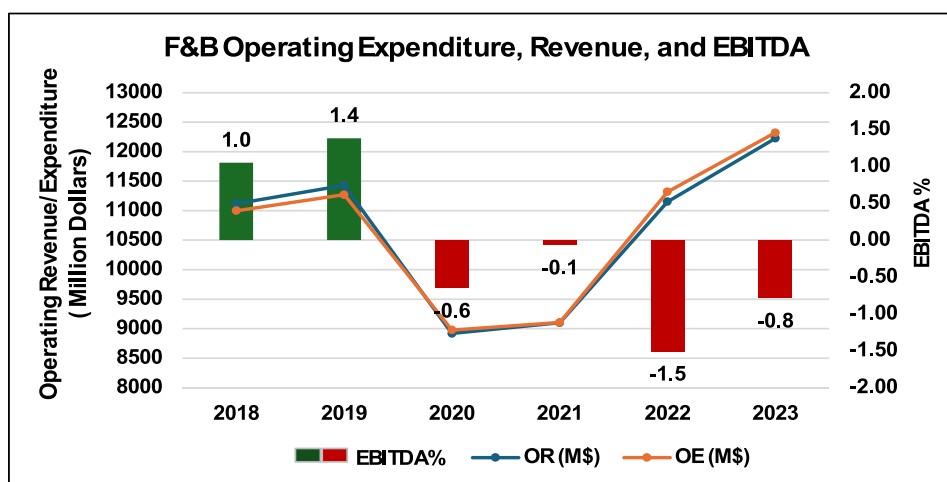
Margin Squeeze in Highly Competitive Sector

Rising Costs Erode Profitability

The F&B sector faces mounting pressure on profitability, driven by escalating operating costs which have outpaced topline operating revenue growth. From 2018 to 2023, operating expenditure grew by 12%, outpacing its revenue growth of 9.97%⁶. The widening gap between expenditure and revenue has undermined companies' ability to sustain healthy margins. The onset of the pandemic further disrupted this fragile equilibrium, pushing profit margins into negative territory - a trend that has persisted even through to 2023.

⁴⁻⁶ Singapore Department of Statistics – Key Indicators by Detailed Industry in All Services Industries, Annual

Figure 2. F&B Operating Expenditure (OE), Operating Revenue (OR), and Earnings Before Interest, Taxes, Depreciation, and Amortisation (EBITDA), 2018-2023

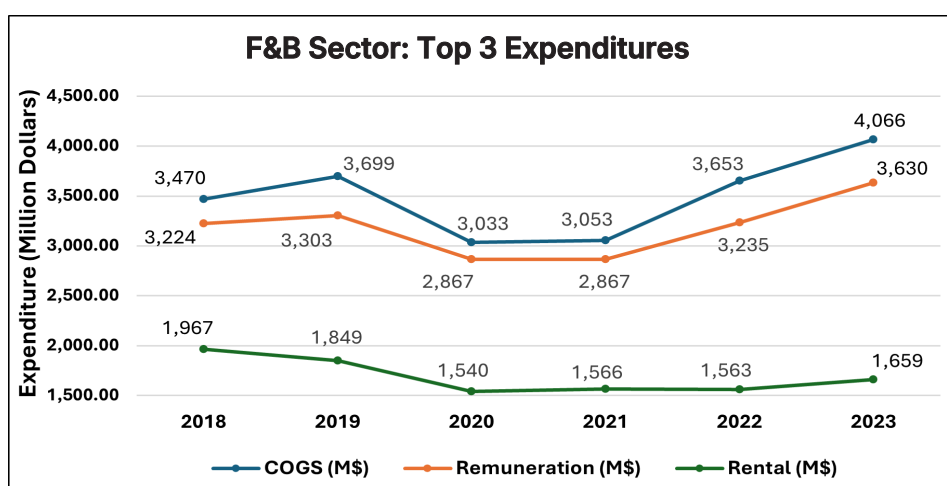


Note: OR = Operating Revenue, OE = Operating Expenditure, EBITDA = Earnings Before Interest, Taxes, Depreciation, and Amortisation.

Source: Singstat – Key Indicators by Detailed Industry in All Services Industries, Annual

Breaking down the sector's cost structure, cost of goods sold (COGS) is the largest and fastest growing expenditure component⁷, reflecting mounting input cost pressures – likely driven by global supply chain disruptions and inflationary trends.

Figure 3. Top 3 Expenditures of F&B Services Sector, 2018-2023

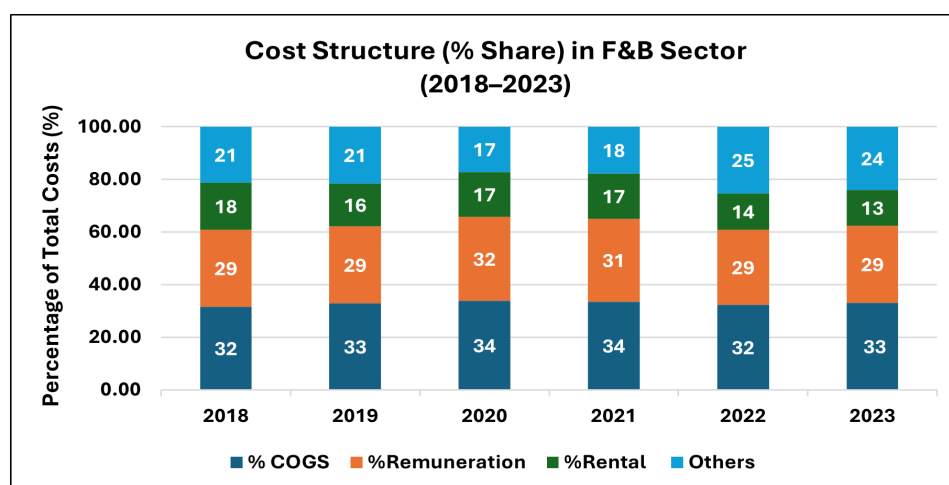


Note: COGS = Cost of Goods Sold

Source: Singstat – Top 3 Operating Expenditure Items by Industry Group in All Services Industries, Annual

⁷ Singstat – Top 3 Operating Expenditure Items by Industry Group in All Services Industries, Annual

Figure 4. Breakdown of Cost Structure (% Share) in F&B Sector, 2018-2023



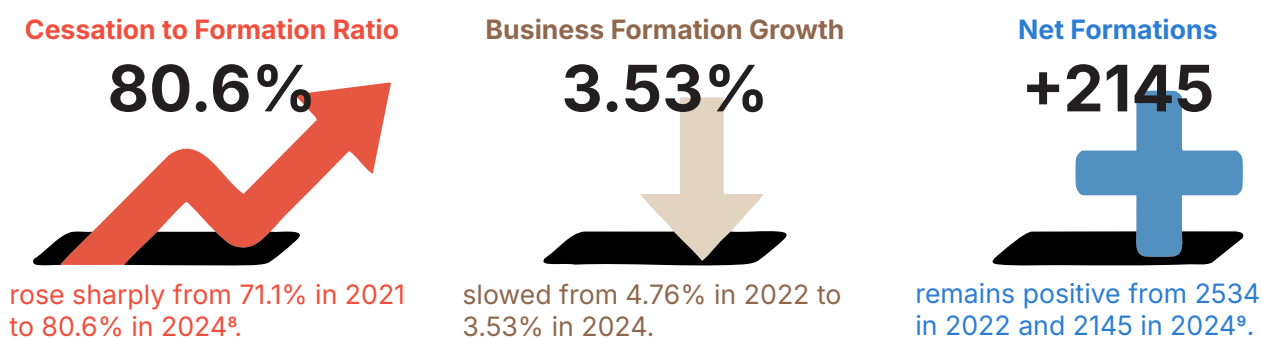
Note: COGS = Cost of Goods Sold

Source: Singstat – Top 3 Operating Expenditure Items by Industry Group in All Services Industries, Annual

Manpower cost, while increasing more gradually, has climbed steadily from 2021 and is a key contributor to rising operational costs.

Rental expenditure has been relatively stable in recent years, despite being commonly cited by the sector as a significant cost burden due to Singapore's high-rent environment.

Domestic Market Saturation Meets Global Entrants



While post-pandemic recovery has reignited interest in the sector, the Cessation-to-Formation (C/F) ratio indicates a persistently high exit rate. The trend reflects mounting operational pressures, intense competition, and signs of market saturation. The numbers point to a sector undergoing significant restructuring. This reflects mounting operational pressures and intense competition, leading to a more rapid exit of less competitive players as operators turn more cautious.

Adding to this intensity is the continued entry of foreign F&B brands from regional markets. These new entrants, often backed by strong branding and scale advantages, further raise the bar for local operators, who must work harder to preserve margins in an increasingly fast-paced environment.

Sustaining Productivity in an Ageing Workforce

Singapore is experiencing a significant demographic shift, characterised by an ageing population. While older workers bring valuable experience and stability, the ageing workforce presents long-term challenges for the F&B sector, which relies heavily on physically demanding roles. Traditional operating models may no longer support sustainable employment levels, with implications for both workforce planning and productivity.

To remain competitive, the sector must urgently redesign job roles, adopt assistive technologies, and implement age-inclusive practices that support meaningful contributions from older workers while enhancing operational sustainability.



Share of workforce aged 60+ increased from 27.3% in 2018 to 32.4% in 2024¹⁰.

⁸⁻⁹ Singapore Department of Statistics - Formation and Cessation of Business Entities in the Food & Beverages Services Industry, Monthly

¹⁰ Ministry of Manpower - Labour Force In Singapore 2024, Employed residents aged fifteen years and over by industry, age, and sex, 2024

03 Objectives of the Productivity Report

Structural challenges faced by Singapore's F&B sector signal the need for business transformation.

The report seeks to:



Identify the key productivity indicators that resonate with businesses and reflect real-world operational performance



Uncover the key success factors driving top-performing establishments



Provide recommendations for F&B businesses to improve productivity, along with the resources and support schemes they can leverage

By surfacing these insights, the report aims to support policymakers, industry stakeholders, and business owners to build a more productive, competitive, and innovation-driven F&B ecosystem for Singapore.

04 Key Insight One:

A typical F&B outlet generates between \$60 to \$65 per man-hour worked

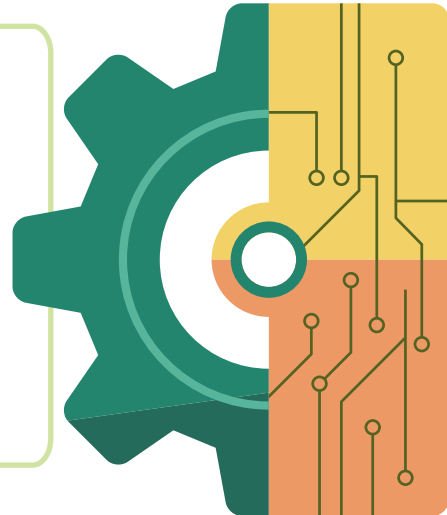
Establishing a baseline benchmark for outlet-level productivity offers a more practical and actionable view of performance on the ground. This outlet-based approach enables businesses to better assess their efficiency, uncover performance gaps, and identify targeted areas for improvement - ultimately supporting more informed business decisions and sector-wide uplift.



Higher manpower productivity is typically driven by operational discipline and strategic technological use. Some quick-service brands exemplify this through process streamlining and staff cross-training, achieving stronger sales per man-hour through more efficient manpower deployment.



... higher manpower productivity is typically driven by operational discipline and the strategic use of technology.

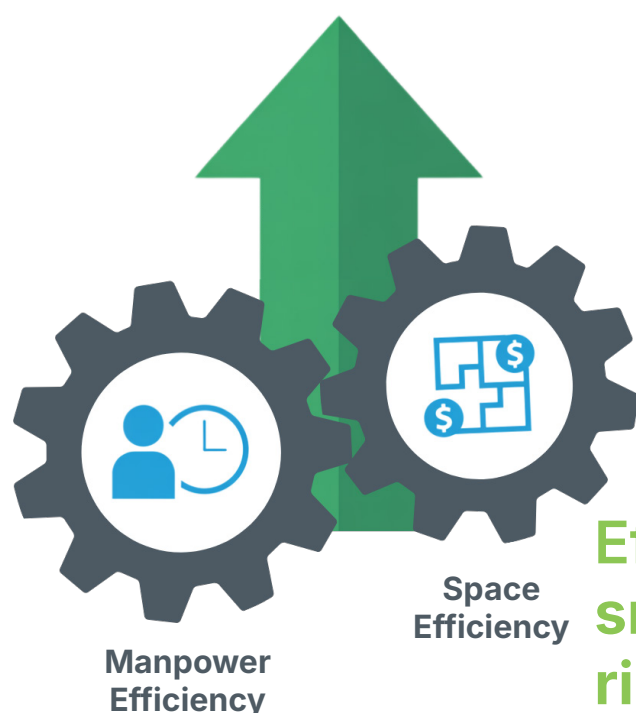


Similarly, another global fast-food chain, widely recognised as a leader in digital innovation, has reduced outlet staffing needs by one to two employees while delivering faster service through the adoption and widespread use of self-ordering kiosks and a customer-facing mobile app.



In contrast to larger formats, small-space concepts like food kiosks tend to report lower sales per man-hour as space constraints limit manpower scalability. The inherent compact nature of these formats makes spatial efficiency metrics – such as sales per square foot – a more appropriate measure of productivity, since their streamlined, and takeaway-focused menus prioritise speed and volume over dine-in experience.

04 Key Insight Two: Businesses which are manpower efficient are also likely space efficient



Our analysis reveal a statistically significant positive correlation between sales per man-hour and sales per square foot. This suggests that productive outlets tend to be effective in managing both manpower deployment and use of floor space. Such synergies typically stem from cohesive operational strategies, ranging from thoughtful layout design to seamless front- and back-of-house coordination.

Efficient layouts, smart staffing, and the right technology... boost overall performance

Quick-service concepts tend to marginally outperform their counterparts in terms of sales per square foot, largely due to their ability to drive volume within a relatively compact footprint. One of the quick-service noodle chains shared with the benchmarking team that it outsources most ingredient and food preparation, thereby reducing kitchen space requirements and simplifying in-store operations. This allows for leaner manpower deployment, increased seating capacity, and faster table turnover – collectively boosting both spatial and manpower efficiency across its outlets.

Fundamentally, it is the combined optimisation of space and manpower that delivers the greatest productivity gains. Businesses that integrate space efficient layouts with effective staffing models and appropriate technology can achieve a compounding effect on overall performance and productivity. Hence, there is a need for a holistic approach to outlet planning – where layout, manpower deployment, and technology work in tandem to maximise productivity outcomes.

04 Key Insight Three:

No sub-sector performed significantly worse, but there is a gap between top performers and underperformers



Format	Bottom 10% (Sales/man-hr)	Top 10% (Sales/man-hr)	Top to Bottom Ratio (Sales/man-hr)
Overall	36.76	105.56	2.9x
FS Restaurants	38.74	100.85	2.6x
QS Restaurants	34.92	96.73	2.8x
Café	34.6	107.59	3.1x
Food Kiosk	30.51	87.8	2.9x
Fast Food	44.2	178.57	4x

Based on the top and bottom 10th percentiles within each subsector, we observe that no subsector performs significantly worse in terms of sales per man-hour. Median values are relatively consistent across full-service restaurants, quick-service restaurants, cafés, food kiosks, and fast-food outlets. This suggests that no specific format is inherently less productive, and each has the potential to operate efficiently.

However, a deeper analysis reveals substantial variation in performance within each sub-sector. The gap between the top and bottom 10% ranges from 2.1x to 4x, with Fast Food showing the widest disparity. These findings highlight that individual outlet-level operations play a far greater role in productivity outcomes than format alone and there are significant opportunities for improvement.



Individual outlet- level operations play a far greater role in productivity outcomes... not format alone...



While outlets located in central areas or high-footfall malls may enjoy higher visibility and customer flow, our analysis did not find a strong or consistent correlation between location and productivity. Instead, how staff is organised, how space is utilised, and the usage of technology solutions had a clearer influence on outlet-level productivity. This suggests that while location can offer certain advantages, the way an outlet is operated remains a more critical factor in driving productivity outcomes.

Overall, the data underscores a critical opportunity to uplift productivity across the sector. Top-performing outlets demonstrate that strategic manpower deployment, efficient spatial planning, and effective operational models can significantly boost productivity – regardless of outlet format or location.

Insights by Mastercard

SGPC collaborated with Mastercard to support the benchmarking of median monthly sales in Singapore.

Mastercard insights covered aggregated and anonymised data on spend based on relevant F&B merchant categories, in compliance with standards on data privacy and protection.



Key Findings

Median monthly sales in food services (extrapolated to all payment methods) were within 10% variance from SGPC's findings, indicating that it is representative on a relative scale between F&B establishments.

Strong Correlation Between Datasets



The relatively small variances could be attributed to the following:

- Observational data collected by SGPC observers is highly dependent on the time of day when observers visited the establishments, as well as seasonality factors.
- Other contributing factors such as different levels of card acceptance, promotions impacting spend at certain establishments, and outliers such as fine dining restaurants driving up transaction values.

5 Best Practices

To complement the quantitative insights, we conducted in-depth interviews with businesses that demonstrated strong productivity performance. From these conversations, five best practices emerged - each offering practical strategies that have contributed to their success.

1

Embracing Digitalisation and Automation

Many top-performing F&B businesses have adopted digital and automation solutions to streamline operations across both front-of-house and back-of-house functions. From self-ordering systems and digital payments to kitchen automation and inventory tracking. These tools help reduce manual workload, improve service speed, and enhance operational consistency.

Case Studies inside:

- Starbucks
- Sushi Express
- AC Concepts- Chicco Pasta Bar
- Minor Food
- HarriAnns
- Shake Shack Singapore

... focus on team leadership and customer engagement..



... clear gains from automation... helping staff work better...



CASE STUDY

Starbucks



Halving Admin Load with Web LST to Brew Better Experiences

At Starbucks Singapore, going digital has been a game changer for the people who matter most – their partners (employees) and customers. One of the biggest shifts came with the introduction of WebLST (Labour Staffing Tool) – an in-house system developed to support outlet-level workforce planning. It helps managers forecast sales, plan manpower, and prepare payroll more efficiently. What used to be a manual and time-consuming task, especially for shift scheduling, has now been streamlined. Managers shared that this tool has helped cut their administrative workload by 30%, freeing up more time to focus on team leadership and customer engagement.



On the customer front, the Starbucks App with its multiple Mobile Order & Pay capabilities (for pickup now, scheduled order and Starbucks® Delivers) has made ordering seamless and more accurate, helping reduce queue times and improve service flow. The app is also continuously improved as Starbucks innovates – users of the app can also send a Starbucks e-gift to their loved ones, or shop via the online store through the app.



With its focus on sustainability, Starbucks has also incorporated the BYOT (Bring Your Own Tumbler) function so that customers can also enjoy the BYOT discount when ordering via the app. Starbucks Rewards members can collect Stars, earn rewards and redeem vouchers with their purchases too.

With less time spent on transactions, frontline baristas can now be more present in creating warm, personalised moments with customers – just the way Starbucks intends it.



SUSHI EXPRESS

CASE STUDY

Sushi Express

Rolling Out Sushi with Double Efficiency

At Sushi Express' dine-in outlets, automation is part of an ongoing effort to enhance operations through smart, practical solutions. The team has adopted sushi robots to improve production speed and consistency – cutting the time needed to mould each piece of sushi from 30 to 60 seconds to under 15 seconds. This has enabled outlets to manage higher volumes more efficiently, especially during peak periods. By automating repetitive tasks, staff can focus on food preparation and keeping the sushi conveyor belt well-stocked, supporting a smoother customer experience.



The group's takeaway brand, Sushi GOGO, has also seen clear gains from automation. Rolling and slicing machines have helped double or even triple output – California rolls increased from 20 to 50 sets per hour, while Hosomaki production rose from 45 to 120 rolls per hour. What used to take over eight hours is now completed in just four hours, freeing up staff to assist with evening prep. This has allowed each outlet to operate more leanly, with less reliance on an additional evening shift.



Across both brands, automation is not about reducing the number of staff required, it is about helping them work better.

Sushi Express continues to explore new technologies that reduce manual workload, ease operational pressure, and support flexible deployment across roles. This forward-looking approach not only improves daily efficiency but reflects the company's broader commitment to continuous improvement and long-term sustainability.

2 Strategic Menu Design for Efficiency and Margin

High-performing businesses are intentional about their menu choices – not just from a customer appeal standpoint, but also from an operational and financial perspective. Strategic menu design involves curating offerings that are popular, cost-effective, and feasible for consistent execution. Simplifying overly complex menus, standardising ingredients, and aligning dishes with kitchen capabilities can reduce prep time, lower training requirements, and improve service speed.



CASE STUDY

AC Concepts – Chicco Pasta Bar

Balancing Taste, Speed and Profitability

AC Concepts takes a thoughtful approach to menu planning, striking a balance between culinary creativity and commercial viability at their pasta concept. At Chicco Pasta Bar, dishes are built around high-margin ingredients, with regular menu rotations to keep offerings fresh and engaging.



Focus on Popular, High-margin Items



Each dish is centred on a well-portioned protein to meet guest expectations, while the presentation is intentionally kept simple to allow for fast execution. With better designed menus, the team maintains efficiency in the kitchen while maximising profitability – without compromising on quality or customer experience.

3 Maximising Productivity Beyond Kitchen Walls Through Outsourcing

Building on a simplified and well-structured menu, some businesses further optimise productivity by outsourcing selected food preparation processes. With fewer complex items on the menu, it becomes more practical to shift labour-intensive tasks – such as sauce preparation, ingredient processing, or base component production – to trusted central kitchens or external suppliers.

This approach helps reduce back-of-house workload, streamline kitchen operations, and maintain consistency across outlets. When paired with thoughtful menu planning, outsourcing allows in-house teams to focus on high-value tasks like finishing, plating, and service – leading to more efficient and scalable operations without compromising quality.



CASE STUDY

Minor Food

Driving Productivity Through Strategic Outsourcing

Outsource repetitive tasks to focus on high-value activities



Minor Food Singapore has improved operational efficiency by streamlining its supply chain and strategically outsourcing selected food preparation processes. For several of our brands, trusted vendors now supply pre-prepped ingredients, which chefs further enhance or customise to preserve brand-specific quality and distinction. This shift reduces the need for intensive back-of-house preparation, enabling shorter working hours, leaner staffing and less reliance on overtime. By allowing chefs to focus on final execution and quality control, this approach delivers greater consistency across dishes while supporting more efficient, scalable and sustainable operations.

Better Process Design to Streamline Workflow and Space for Multiplying Gains

Top-performing F&B businesses understand that productivity does not hinge on a single factor – it is about how well every part of the outlet comes together as they take a deliberate approach to refining outlet workflows and operations. From back-of-house layout to service flow, every aspect is designed to eliminate inefficiencies, reduce staff movement, and maximise space usage. This reinforces the value of a holistic and process-driven approach to outlet planning, where operational design is optimised for both efficiency and scalability.



CASE STUDY

HarriAnns



Cutting Production Time by 40–50% Through Smart, Integrated Workflow Design

HarriAnns is a standout example of how thoughtful process design can elevate both customer experience and operational efficiency in F&B.

Back-of-House

The lean back-of-house setup occupies just 25% of outlet space. HarriAnns relies on its central kitchen for the bulk of cooking and preparation. This division of labour ensures consistency and allows the outlet team to focus mainly on reheating, assembly, and service. Automation tools (e.g., kueh cutters) improve efficiency, reducing manual labour and enhancing output quality. Standard operating procedures are strictly followed; a benchmark ensures the fifth customer is served within 10 minutes. These refinements are crucial for speed, quality, and service consistency in a manpower-constrained environment.

Front-of-House

Outlets are designed to streamline customer flow and maximise sales efficiency. Nonya kueh and coffee are at the entrance for quick purchases. Further inside, mains (curry chicken, fish soup) use Bain Marie systems for fast, ready-to-serve portions without compromising quality. QR code ordering reduces counter congestion, enables upselling, and frees staff for service. Only 25% of the space is used for kitchen operations; the remaining 75% is optimised for customer seating and display, balancing efficiency and revenue.

Productivity Starts with Right People and Cohesive Teams

People are at the heart of every productive F&B operation. While layout, processes, and technology all contribute to performance, these strategies rely on a well-trained, motivated, and stable team to be executed effectively. Businesses that invest in attracting the right talent, providing structured onboarding, and fostering a supportive work environment are better able to build strong, high-performing teams.

On the flip side, high turnover incurs significant cost – both in time and resources spent on recruitment and retraining – and can disrupt operations, lower morale, and reduce service consistency. By aligning staff development with operational goals, and focusing on retention as much as hiring, leading operators strengthen not only team resilience but also long-term productivity outcomes. A strong team does not just support the business – it powers it.



CASE STUDY

Shake Shack Singapore

Driving Productivity Through Strategic Outsourcing

Shake Shack Singapore has taken active steps to improve staff retention and performance by aligning staffing models with employee wellbeing and operational needs. A shift from six-day to five-day workweek has helped reduce burnout and improve retention. The company also rebalanced its full-time to part-time staffing ratio from 20:80 to 40:60, with plans to reach a more sustainable 50:50 split – helping to ease pressure on full-timers while improving accountability across the team.



Training and development are central to Shake Shack's approach. New hires undergo structured onboarding and are cross-trained across 13 kitchen stations, with certification required before taking on key roles. A dedicated in-house Learning & Development team handles 90% of the training, supported by external programmes for specialised skills. To support a more inclusive workforce, the brand has also started engaging semi-retired and older workers in light-duty roles, strengthening team diversity while meeting operational needs.

06 From Insights to Action

F&B businesses should consider tracking sales per man-hour at the outlet level, if they are not already doing so. Productivity metrics offer deeper operational insights and are closely tied to profitability—higher sales per man-hour often lead to stronger bottom-line results.

With benchmark data now available across sub-sectors, businesses can gauge performance and set realistic improvement goals. The large gap between top and bottom performers signals clear opportunities for uplift. **Underperformers can act now by adopting practical, proven strategies—like workflow redesign or smarter menu planning—which are often low-cost with quick impact.**



Improving productivity is a continuous process that requires commitment and regular review. With benchmarks, best practices, and accessible starting points in hand, F&B businesses can take focused actions aligned with their own pace and priorities.

To support this, a wide range of resources is available from both public and private sectors. Government agencies such as EnterpriseSG and WorkforceSingapore, and organisations like the Singapore Productivity Centre offer practical support in areas such as digitalisation, automation, and menu engineering. Initiatives like the FoodX outsourcing and Process Optimisation Programme (POP) can help operators streamline back-of-house processes and manage manpower more effectively.

Singapore's F&B sector remains a key part of the economy but faces rising costs, manpower pressures, and uneven productivity gains. This report shows that while revenue growth has outpaced value added, there is clear potential to close the gap through operational discipline, technology adoption, and workforce development.

Top-performing operators demonstrate that digitalisation, process redesign, and job redesign can deliver measurable impact. With the support of initiatives such as FoodX, POP, and Career Conversion Programme (CCP), the sector is well-placed to build resilience, uplift productivity, and position itself for sustainable growth in the years ahead.

Resources

Programmes Available at Singapore Productivity Centre (SGPC)



1 FoodX

FoodX is an innovative initiative supported by EnterpriseSG, designed to empower small F&B businesses by fostering partnership with food manufacturers, thereby enhancing production processes and product quality.

2 Career Conversion Programme (CCP) for Food Professionals and Associates

SGPC is the appointed programme partner for Workforce Singapore's Career Conversion Programme (CCP) for Food Services and Food Manufacturing, which supports companies in upskilling existing staff and attracting new talent into the sector.

Agencies



Enterprise Singapore (EnterpriseSG)

Enterprise Singapore is the government agency championing enterprise development. The agency partners committed companies to build capabilities, innovate, and go global. It drives growth – empowering local businesses and shaping industries, anchoring Singapore as a trade and startup hub, and establishing trust in products through quality and standards. Enterprise Singapore is here for wherever businesses are growing.



Workforce Singapore (WSG)

As a statutory board under the Ministry of Manpower, WSG drives workforce transformation and supports career development through programmes like the Career Conversion Programme (CCP).

Acknowledgements

SGPC extends its heartfelt gratitude to the following partners for their invaluable support and collaboration.

- Associate Professor Lee Kuan Huei, Director of Programmes at the Business Communication & Design (BCD) Cluster of the Singapore Institute of Technology (SIT) as Chief Research Officer
- Restaurant Association of Singapore (RAS), Association of Catering Professionals Singapore (ACAPS), Foochow Coffee Restaurant and Bar Merchants Association, and Grab for their role in engaging the F&B community and contributing practical, ground-level perspectives
- Mastercard, whose insights and data support were instrumental in validating the study's findings
- Singapore Institute of Technology (SIT) and the Asian Productivity Organization (APO) for their expertise in productivity research, methodology design

SGPC would also like to express our sincere appreciation to all participating companies, partners, and stakeholders who contributed their time and insights to this Food Services Productivity Report.

- | | |
|-----------------------------------|--------------------------------------|
| 1. AC Concepts - Chicco Pasta Bar | 16. Koufu |
| 2. Badaling | 17. Le Shrimp Ramen (Paradise Group) |
| 3. Chang Cheng Holdings | 18. Minor Food Group |
| 4. Eurasia Global Food | 19. Muthu's Curry |
| 5. Fei Siong Group | 20. Old Chang Kee |
| 6. Five Star Chicken Rice | 21. Pontian Wanton Noodles |
| 7. Food Dynasty | 22. Qiji |
| 8. Greendot | 23. Select Group |
| 9. HarriAnns Nonya Table | 24. Seoul Yummy |
| 10. Harry's International | 25. Shake Shack |
| 11. Haidilao | 26. Starbucks Coffee Singapore |
| 12. Jinjja Chicken | 27. Sukiya-KIN |
| 13. JP Pepperdine Group | 28. Sushi Express |
| 14. Kim San Leng | 29. The Soup Spoon |
| 15. Kimly Group | |

Appendix

Sub-sectors Definitions

The definitions below are based largely on the Singapore Standard Industrial Classification (SSIC) 2020. However, for the purpose of our productivity report, we further sub-categorised restaurants into Full-Service Restaurants and Quick-Service Restaurants to improve granularity and accuracy during field observations. These are the F&B sub-sector definitions used in our productivity report:

1. Full-Service Restaurants

Establishments where customers are seated and served by waitstaff. These restaurants typically offer a diverse menu, table service, and a more extensive dining experience. Meals are usually prepared to order, and the atmosphere ranges from casual to fine dining.

2. Quick-Service Restaurants (QSR)

Also known as limited-service restaurants, QSRs are characterised by fast food preparation and minimal table service. Customers usually order at a counter or kiosk and either dine in quickly or take away. Menu items are standardised and designed for speed and convenience.

3. Cafés

Cafés are casual establishments primarily focused on serving coffee, tea, and light refreshments such as pastries, sandwiches, and snacks. They often provide a relaxed environment for socialising or working and may offer limited table service or self-service.

4. Fast Food Establishments

A sub-category of QSRs, fast-food establishments offer highly standardised, low-cost meals with a focus on speed and volume. Food is often pre-cooked or assembled quickly. These outlets are typically part of large chains and rely heavily on takeaway and delivery.

5. Food Kiosks

Small-scale outlets, often with no seating area, that serve ready-to-eat food or beverages from a compact, standalone structure. Located in high-traffic areas like malls or transport hubs, food kiosks specialise in quick transactions and minimal preparation on-site.

Methodology

Our Focus

Outlet-level productivity benchmarking across Singapore's F&B sector (excluding hawker stalls)

The Benefit

Compared to firm-level analysis, this approach offers granular, actionable operational insights and more targeted improvements

Key Metrics Used

While value-added output is commonly used in productivity studies, it is less relevant for day-to-day decision making. This report instead adopts the following metrics that are more intuitive and actionable, offering immediate insights for staffing or operational adjustments:



SALES PER MAN-HOUR

the primary metric for this report, reflecting manpower productivity



SALES PER SQUARE FOOT

measures space utilisation



MANPOWER RATIO

indicates staff deployment density

Data Collection Approach



Quantitative Data

Onsite visits were conducted across a range of F&B sub-sectors, including full-service restaurants, QSRs, Cafés, and kiosks, to capture key variables such as monthly sales, floor area, and staff count during peak hours.



Qualitative Insights

This was complemented by control group and deep-dive interviews with top-performing outlets to identify the key productivity metrics operators use and to uncover the strategic insights driving their success.



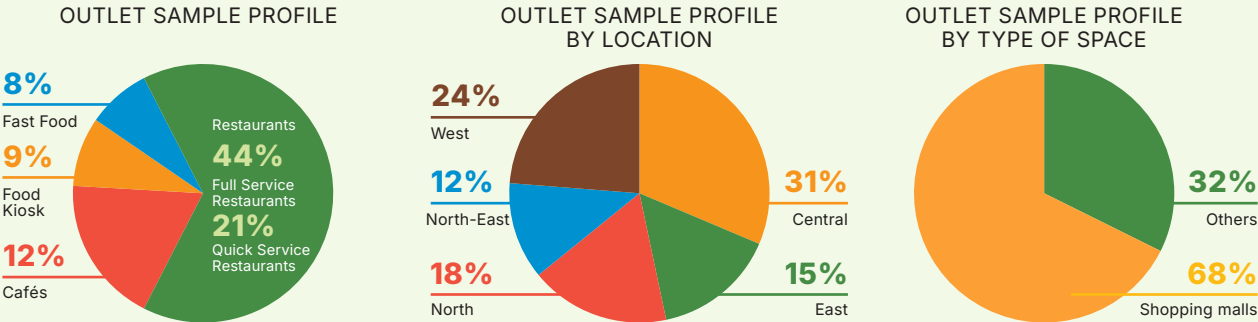
Benchmark Analysis

Combined quantitative and qualitative data was then aggregated and analysed to establish industry norms and benchmarks, identify performance gaps, and synthesise the key insights and best practices presented in this report.

Sample Profile

The outlet sample was selected to reflect the sub-sector composition of Singapore’s F&B sector. Care was also taken to ensure a balanced geographical spread across central and heartland zones. To better capture the diversity of operating environments, the sample included outlets situated in varied physical formats such as shopping malls, shophouses and mixed-use developments.

A total of 380 outlets were observed. The outlet profiles are presented in charts below:



Analytical Framework

The Food Services Productivity Report was conducted using median-based comparisons across individual sub-sectors to ensure fair and relevant performance assessment. This approach helps account for variations in business models and outliers within each category. From this analysis, the top 10% of outlets within each sub-sector were identified based on the primary productivity metric – sales per man-hour. These top-performing outlets served as the basis for extracting operational insights, which were further developed into the best practice case studies featured in this report.