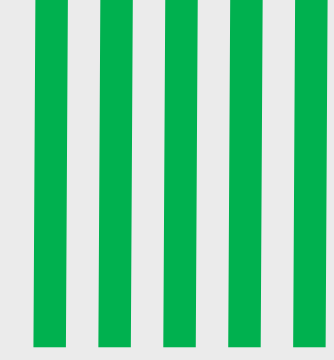




Grab

SG Food & Grocery Trends 2022

How on-demand delivery is changing
the way we eat, shop, order, and discover.



Report Methodology



Primary Research
from 6 countries*



Expert Interviews
and Industry sources^



Media Trends
Analysis



Grab Platform
Insights+

Note:

* Grab surveys conducted online by Kantar and NielsenIQ for Grab in Singapore, Malaysia, Indonesia, Philippines, Thailand, and Vietnam.

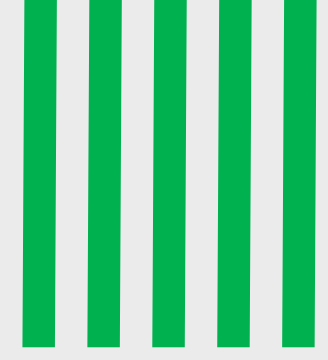
Data collection was from January to September 2022. Total number surveyed across the region:

Online food delivery was n=33,840. Singapore n=3,600, Malaysia n=6,030, Indonesia n=12,240, Philippines n=3,600, Thailand n=4,770, Vietnam n=3,600.

Online grocery delivery was n=27,900. Singapore n=3,600, Malaysia n=4,500, Indonesia n=9,000, Philippines n=3,600, Thailand n=3,600, Vietnam n=3,600.

^ Qualitative discussions across the region to draw out more nuanced perspectives and insights.

+ GrabFood and GrabMart platform insights across January 2019–June 2022.



Big thanks to our partners

for sharing their insights and
case studies for this report





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- 04 Top Trends to Supercharge Sales
- 05 Top Tools Every Business Should Know
- 06 How to Get Ahead with GrabAds

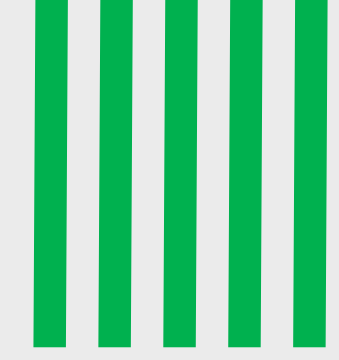
01

Deliveries After COVID-19: Appetites Continue to Grow

2022

2019



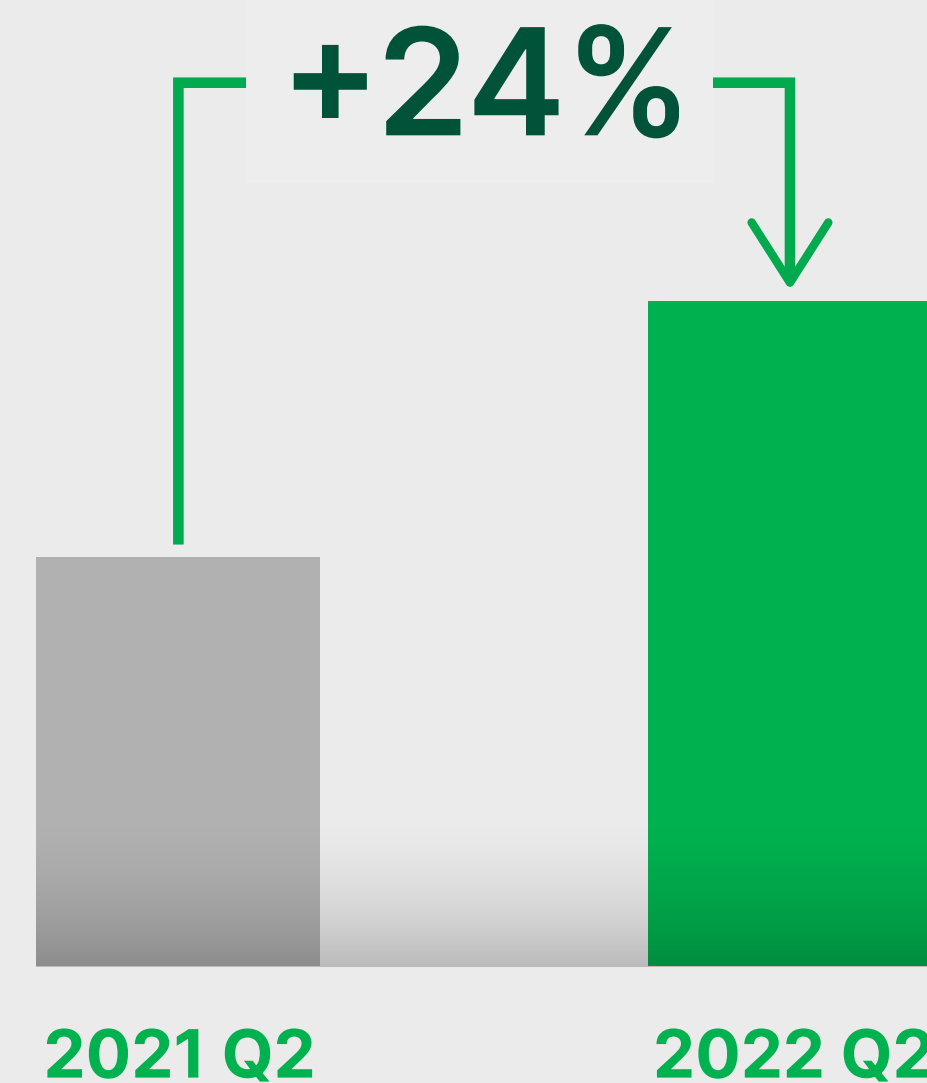


Remember when deliveries kept us sane? It wasn't just a phase

Lockdown restrictions really changed the way Southeast Asians eat and shop. But demand for deliveries never stopped, even after restrictions were lifted.

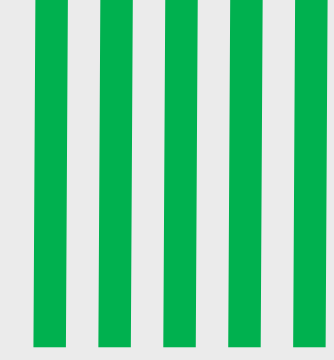
Source:
1. Grab Q2'22 earning results
2. Grab survey July 2022. n=8,671 active Grab users regionally.

Total Grab transacted delivery sales volume continued to grow in the last year¹



Total YoY% Gross Merchandise Value Growth

7 in 10
say that deliveries are a permanent part of their lives today²



Post COVID-19: Delivery habits are here to stay

Singaporeans are ordering more often than ever before on GrabFood and GrabMart.

On GrabFood,
consumers ordered

1.5x 

more often in 2022
compared to 2019¹

On GrabMart,
consumers ordered

1.2x 

more often in 2022
compared to 2020¹

Source:
1. Grab Internal Data, 2019-2022 (monthly average).

They're not just ordering more, they're spending more per order¹

On GrabFood, average basket sizes grew

15%

(2022 vs 2019)



On GrabMart, average basket sizes grew

54%

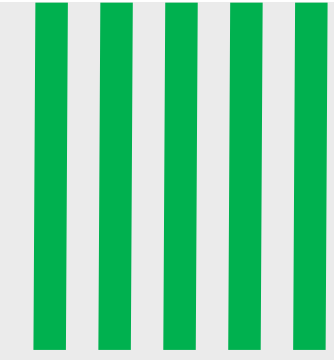
(2022 vs 2020)



Source:
1. Grab Internal Data, 2019-2022 (monthly average).

Wow, the largest
single GrabFood
order in 2022 was
S\$992.48
Was that you?

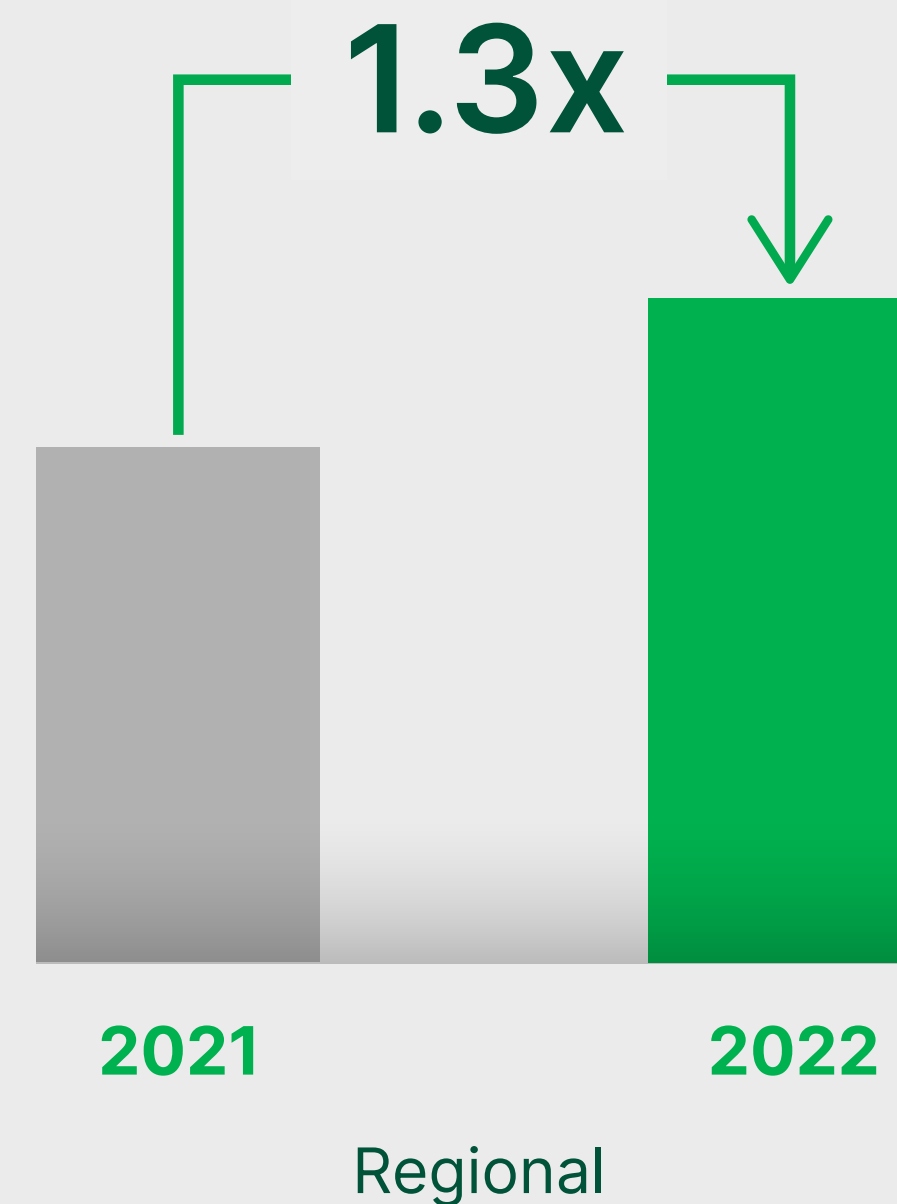




Southeast Asians continue to spend more going into 2022

Expenditure on food and grocery delivery grew by 1.3x between 2021 and 2022.

Food and Grocery delivery expenditure¹



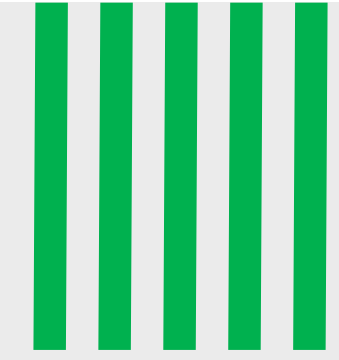
Top reasons Singaporeans use food delivery platforms²

- #1 Convenience
- #2 On-demand
- #3 Social gatherings

Source:

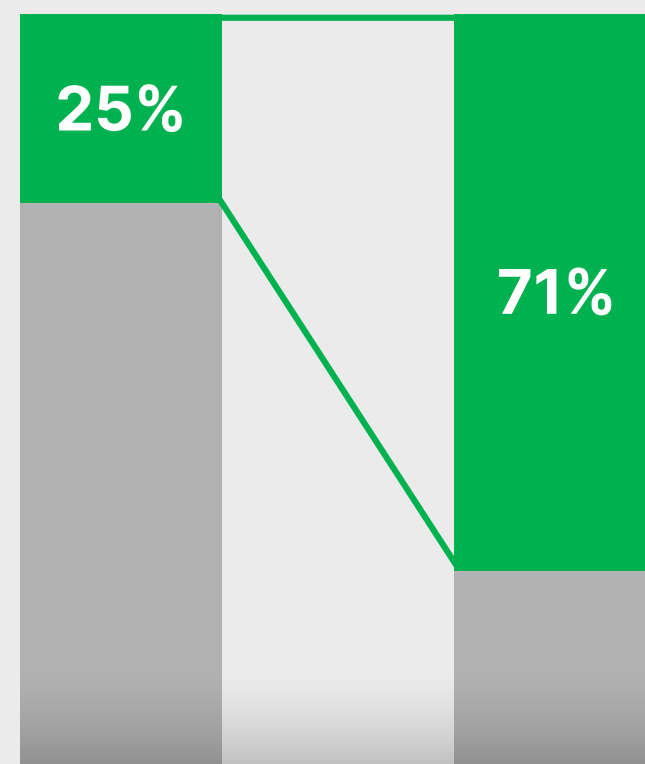
1. Grab survey Nov'21 and May'22, n=13,720 active food and grocery delivery users regionally.

2. Grab survey H1'22. n=3,017 active food delivery users in Singapore.

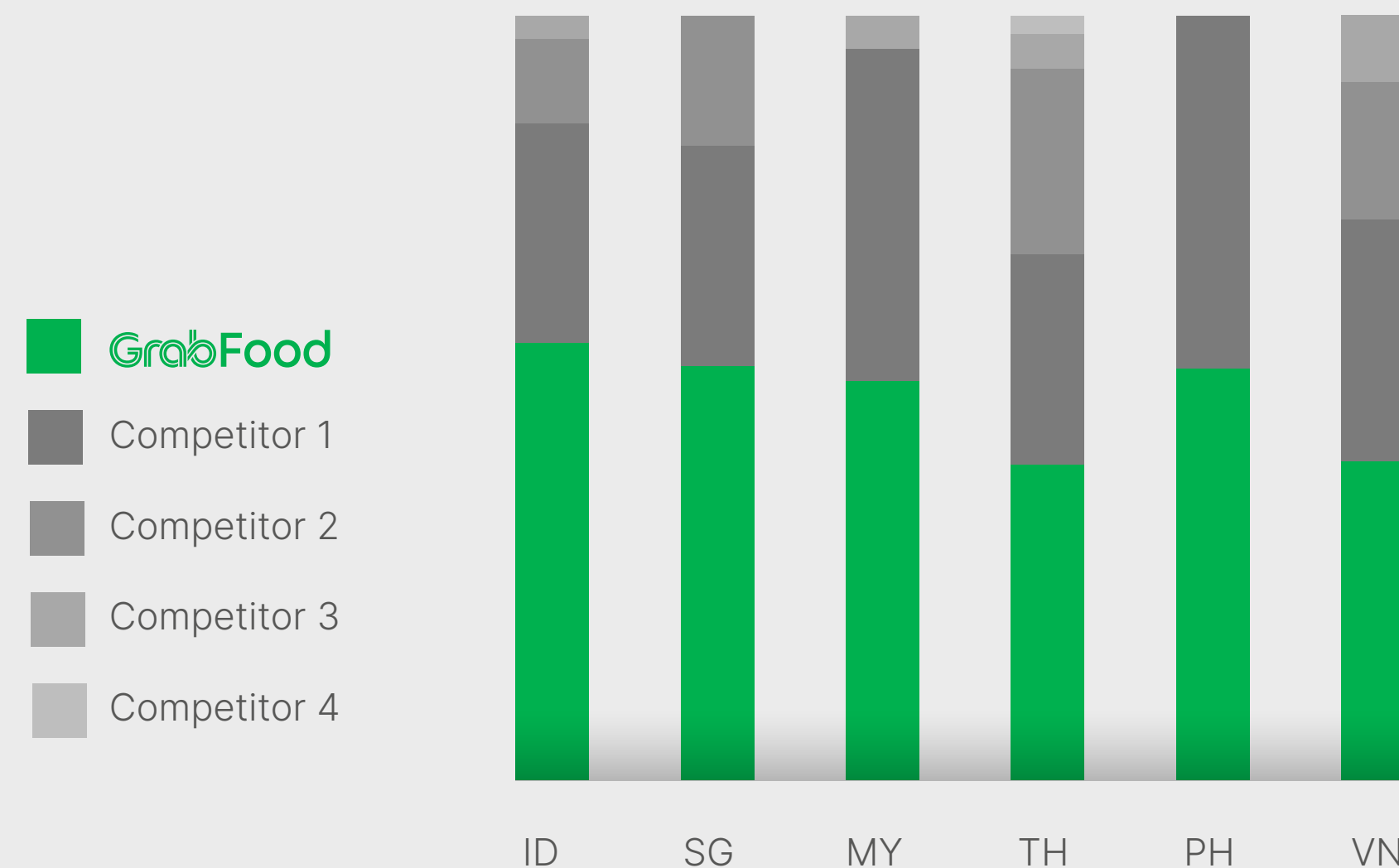


Heavy users disproportionately drive the most spend across the region

Top 25% of users in SEA contribute to 71% of deliveries spending in the region¹



And these heavy food delivery users in SEA prefer GrabFood²



Source:

1. Grab survey H1'22, n=10,832 active food and grocery delivery users regionally.

2. Grab survey H1'22. n=6,432 heavy food delivery users regionally. Compared against key food delivery players in the region based on most often used brand.

Heaviest delivery users tend to be young families¹

58%

married with kids

> 5x online food delivery orders a month

Top 3 reasons of ordering

- Too busy to cook
- Cravings to satisfy
- Looking to treat their family

62%

married with kids

> 7x online grocery delivery orders a month

Top 3 reasons of ordering

- Special promotions
- Easy way to try new products
- Browse products leisurely



Source:
1. Grab Survey H1'22. n=1,139 heavy food and online grocery delivery users in Singapore.

02

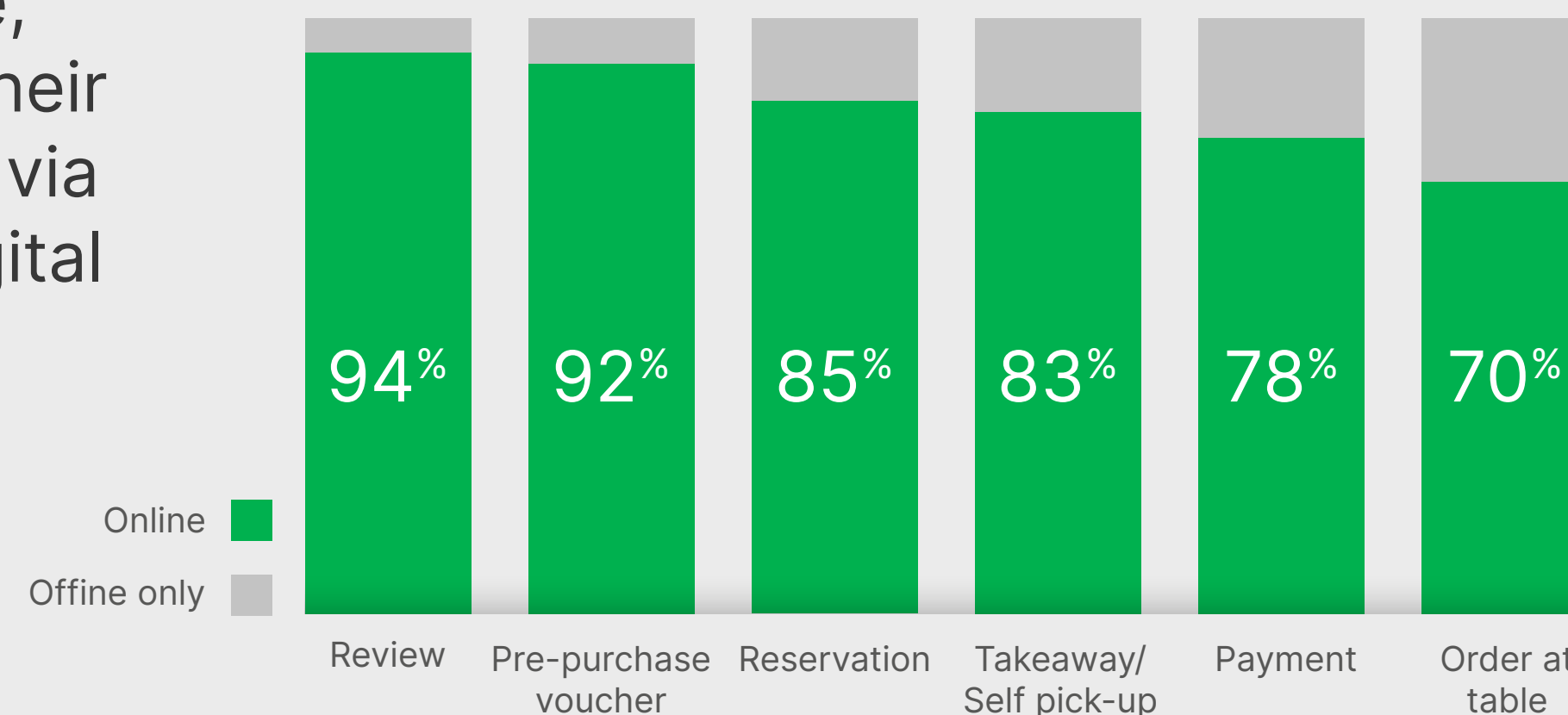
Evolution:
From Delivery
to Discovery



Digital now means omnichannel

Consumers now look forward to be able to discover, engage, and order from their favourite brands via some form of digital means.

Digital platforms have become an integral part of the consumer journey



Consumer digital usage when it comes to dining out or takeaway¹

9 in 10 consumers prefer brands with an integrated online-to-offline experience¹

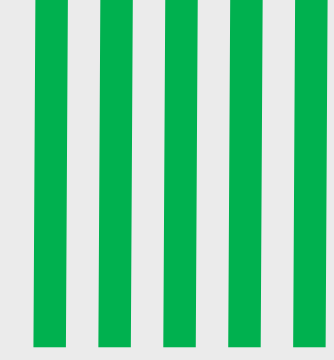
“It's all about digital convenience—one app to browse, order, pay, read reviews, and purchase deals. Whether it's ordering in, dining out, or takeaway—we want that to be available via the Grab app, and for consumers to have the same great experience in-app and in-store.”

With COVID-19 recovery in full swing, we're seeing more merchant-partners adopting our online-to-offline solutions. From Self Pick-up to GrabUnlimited and integrated advertising campaigns, we're working to bring the best experience and value to consumers.”

Saad Ahmed,
Managing Director,
Regional Head of
Commercial at Grab



Source:
1. Grab survey July 2022, n=8,452 active Grab users regionally.



Delivery apps don't just deliver, they aid in discovery too¹

88%

got to know of a new store because of delivery apps

90%

tried at least one new store in a delivery app that they have not tried in person

74%

browse the delivery app without any restaurant or store in mind

17 mins

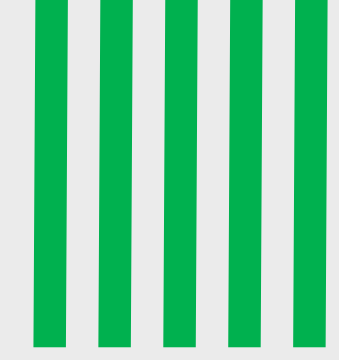
is the average time consumers spend searching and browsing before making an order on GrabFood²



Win new customers while they're searching.
Get ahead of competition with GrabAds search boosters.

Learn more at www.grab.com/sg/business/ads/

Source:
1. Grab survey July 2022, n=8,671 active Grab users regionally.
2. Grab Internal Data H1'22.



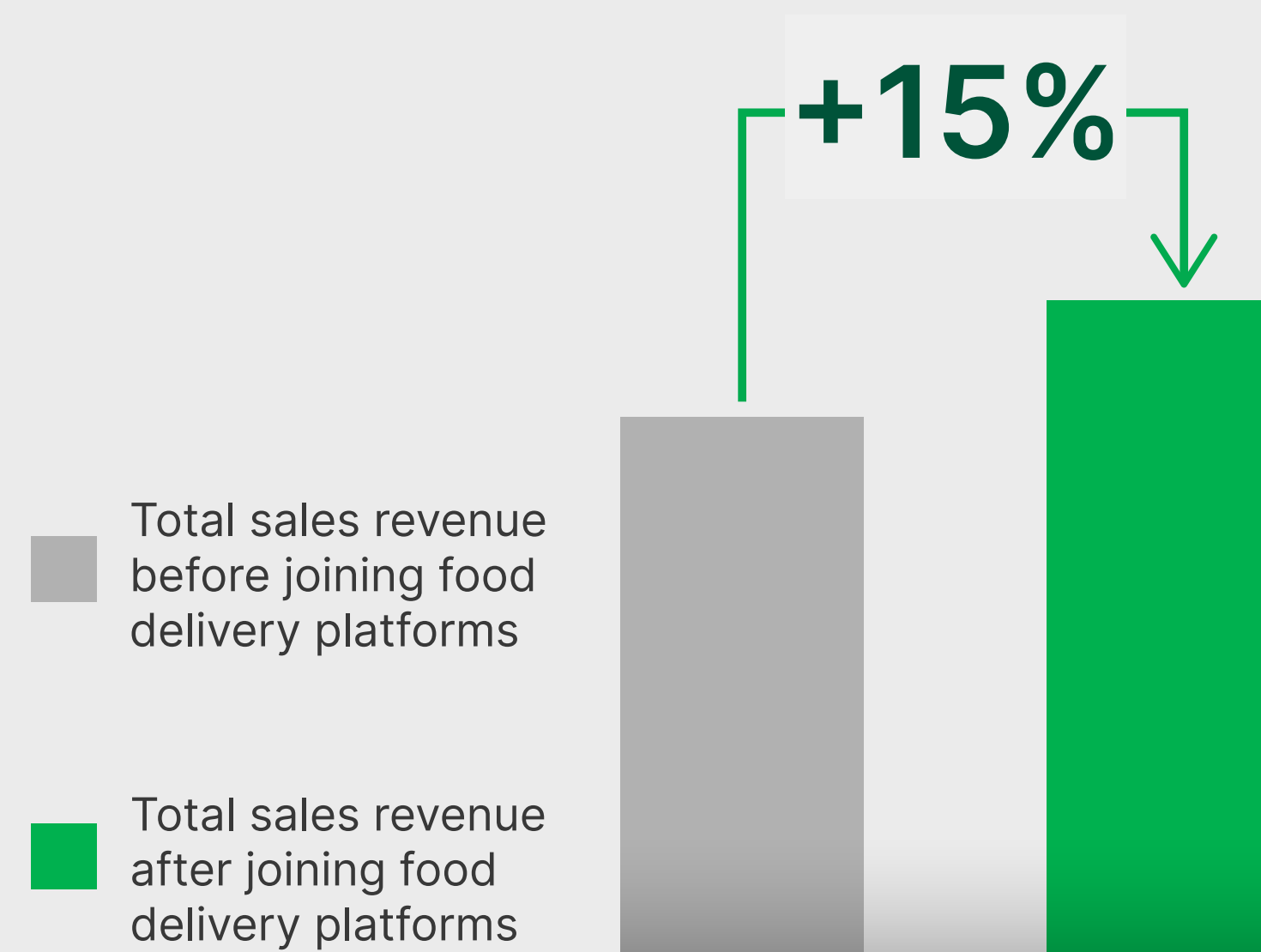
7 in 10 merchants say that delivery platforms are a must-have for their businesses to survive

Delivery platforms have been instrumental in bringing in more customers to their business.¹

Source:

- 1. Grab survey September 2022, n=50 active Grab merchants in Singapore.
- 2. Grab survey September 2022, n=662 active Grab merchants regionally.

3rd party delivery apps continue to drive incremental revenue to merchants²



73%
of SEA merchants attribute majority of their online sales to GrabFood²

“Being on GrabFood is like locating a McDonald's restaurant within Southeast Asia's largest digital food court.”

Food delivery used to be a luxury but it's now a part of everyday life. Deliveries at McDonald's now consistently make up 30% of our business in Asia versus just 10% pre-COVID-19. While we have our own McDelivery app, we also work closely with third-party delivery platforms like Grab as we want our brand to be accessible to customers both offline and online.

Aside from delivery, we also work with Grab on in-store payment, loyalty rewards, and integrated campaigns to bring the same digital convenience from the Grab app into our stores and to extend the McDonald's experience into the Grab app.

Eugene Lee

Regional CMO (Asia) at McDonald's



03

Top Orders
that Stole
the Spotlight
on Grab



Step aside bubble tea, hello coconut shake



Singapore's Top Orders on GrabFood

	2021	2022
1	Burger	Burger
2	Prata	Coconut shake
3	Ice cream	Prata
4	Coconut shake	Ice cream
5	Fried chicken	Nuggets
6	Milk tea	Milk tea
7	Nasi lemak	Fried chicken
8	Curry puff	Siew mai
9	Fries	Tuna sandwich
10	Siew mai	Mee siam

Singapore's Most-searched Cuisines on GrabFood

	2021	2022
1	Korean	Vegetarian
2	Vegetarian	Thai
3	Thai	Korean
4	Indian	Indian
5	Chinese	Japanese

**'Vegetarian'
overtook
'Korean'...**
Whaaat?



Over 7 million burgers were sold on GrabFood in 2021

That's 14 burgers sold every minute!



Cooling drinks: the COVID-19 home remedy

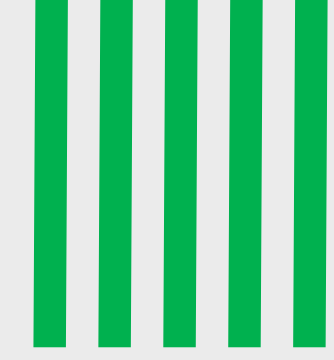
1 COVID-19
test kit was sold
every 2 minutes
in 2022!



Singapore's Top Orders on GrabMart

	2021	2022
1	Yoghurt	Yoghurt
2	Beer	Cooling water ↗
3	Bottled water	Covid test kit ↗
4	Sashimi	Sashimi
5	Watermelon	Chrysanthemum tea ↗
6	Papaya	Herbal tea ↗
7	Ice	Milk ↗
8	Milk	Beer
9	Sushi	Ice cream ↗
10	Cooling water	Eggs





Any guesses what the top eats were throughout the day?

Round the clock orders:
Burgers,
fried chicken,
and prata!



Breakfast

5am – 11am

Top 3 foods:

Toast & sandwich
Soft boiled eggs
Mee siam

Top 3 beverages:

Kopi O (black)
Caffè latte
Caramel macchiato



Lunch

11am – 3pm

Top 3 foods:

Nasi lemak
Chicken rice
Stir fried noodles

Top 3 beverages:

Coconut shake
Milk tea
Coffee



Tea Time

3pm – 6pm

Top 3 foods:

Curry puff
Otah
You tiao

Top 3 beverages:

Coconut shake
Milk tea
Honey green tea



Dinner

6pm – 10pm

Top 3 foods:

Garlic naan
Burrito bowl
Ice cream

Top 3 beverages:

Coconut shake
Milk tea
Smoothies



Supper

10pm – 5am

Top 3 foods:

Ice cream
Nuggets
Instant noodles

Top 3 beverages:

Carbonated drinks
Teh tarik
Dark chocolate

'Tis the season for feasts and sweets

Christmas and New Year hot sellers

3 ways to boost year-end sales

- **Bundled variety platters**

Cater to large group celebrations with dishes like grilled meat platters, pizza, and fried foods.

- **Snacks and sweet treats**

Orders for chips, ice cream, sugary drinks, and chocolates went up by 80% compared to a normal day!

- **Lots of beverage options**

Offer alcohol, soda, mixers, and ice to fuel those celebrations.



Cakes



Steak & meat platters



Pizza



Canned drinks

Traditional goodies make reunions complete

Chinese New Year favourites

3 tips to boost Chinese New Year sales

- **Create family sets**
Provide bundles and platters that cater to groups of 4 and above.
- **Stock up for last minute shoppers**
Oranges, pork jerky, and festive cookies fly off the shelves especially 3 days before Chinese New Year.
- **Add Yusheng to your menu**
More than 30 Yusheng orders were sold every hour!



Alcohol



Pork jerky (肉干)



Mandarin orange

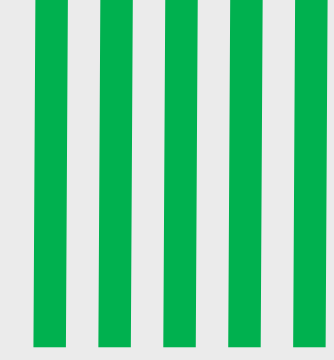


Yusheng (鱼生)

04

Top Trends to Supercharge Store Sales



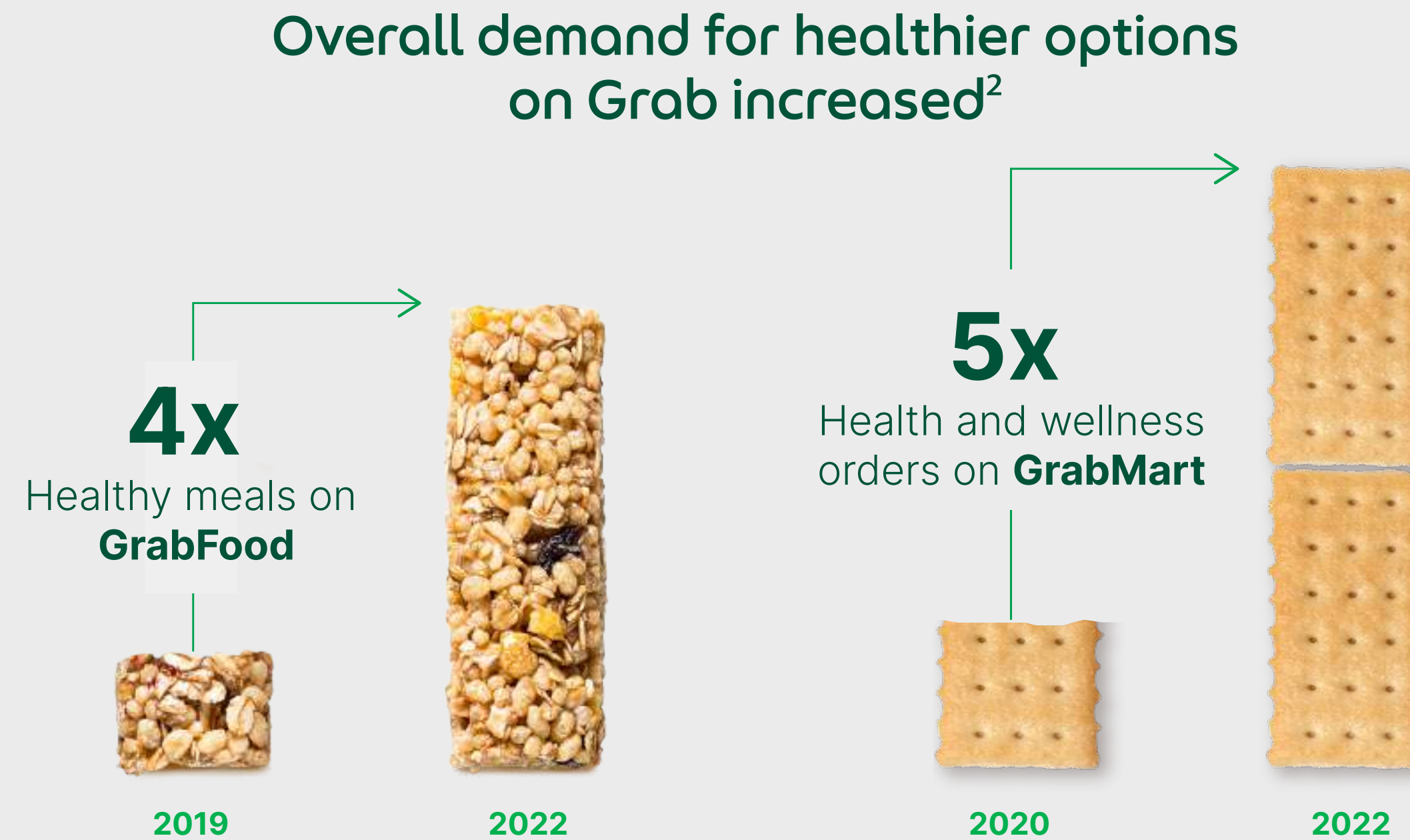


Trend #1

Healthy and plant-based alternatives are no longer niche

77% of Singaporeans say that they consume at least 1 healthy meal every 2 to 3 days.¹

Source:
1. Grab survey July 2022, n=1,729 active Grab users in Singapore.
2. Grab Internal Data, 2019-2022.



3 out of 5 consumers tried plant-based alternatives in the last 6 months¹

GrabFood consumers tend to opt for healthier foods during lunch, as compared to other times of the day



“Plant-based burgers made Burger King® available to a wider audience.”

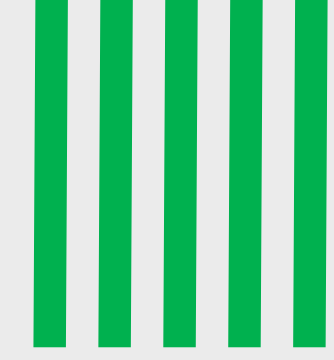
In response to the global demand for alternative proteins, Burger King introduced its plant-based platform to Asia in 2021, starting with the iconic WHOPPER® in a plant-based version, catered to Asian tastes. Since then, we have seen it to be incremental to our business.

At Burger King, our plant-based products are created to feel, taste, and look similar to real meat—and it delivers the same amazing Burger King experience.

Guests are at the center of our decisions, and we’re committed to giving them options they can feel good about. We are excited about the category and will continue to extend our plant-based offerings both in restaurants and on delivery platforms like Grab.

Daphne Kuah
Chief Marketing Officer (APAC)
at Burger King





Trend #2

More people opted to entertain at home vs dining out

2 in 5 consumers prefer ordering in for social gatherings instead of eating out.¹

Source:

1. Grab survey August 2022, n=826 active Grab users in Singapore.

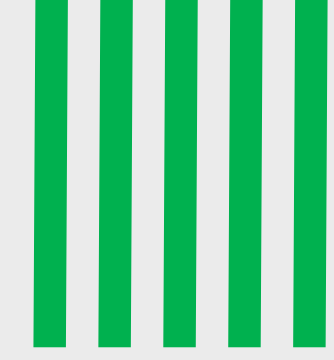
2. Grab Internal Data, 2020- 2022. Defines as monthly basket spend in top 30%



This is your cue to expand your menus with bundles for large group orders, or even special festive items!

Types of food ordered for large gatherings¹

1. Sharing platters
2. Bundle or combo meals
3. Finger foods



Trend #3

Customers spend more when they can customise

9 in 10 consumers are more likely to order from merchants that allow customisation.¹

Top things that Singaporeans love to customise³:

- Spice level
- Sweetness level
- Types of sauces
- Toppings
- Side dishes

GrabFood merchants that offer customisation see larger basket size sales²

Average basket size without customisation

Average basket size with customisation **+15%** ↗



Source:

1. Grab survey July 2022. n=1,183 active Grab users in Singapore.

2. Grab Internal Data H1'22. Basket size comparison of single outlet GrabFood merchants with and without customisation.

3. Grab survey July 2022. n=672 active Grab users in Singapore.

“Subway believes in offering options that are convenient, affordable and customised just the way our guests like them.”

As one of the world's largest quick-service restaurant brands, Subway serves made-to-order sandwiches, wraps, and salad bowls to millions of guests, across over 100 markets in more than 37,000 restaurants every day.

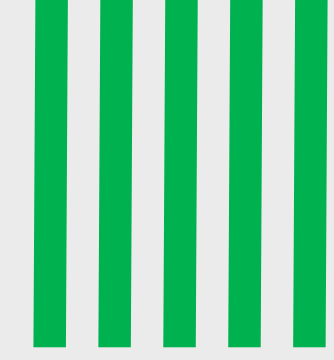
Increasingly, we see guests wanting the ability to choose and customise their food—not just within our physical restaurants but also on delivery platforms such as GrabFood.

Whether it's the bread we bake fresh daily, craveable signature subs, or new flavours added to our fan-favourite sandwich combinations, we continue to innovate to offer new and improved menu items to excite new and returning guests.

Samad Shariff

Country Director (SEA & Hong Kong/Macau) at Subway

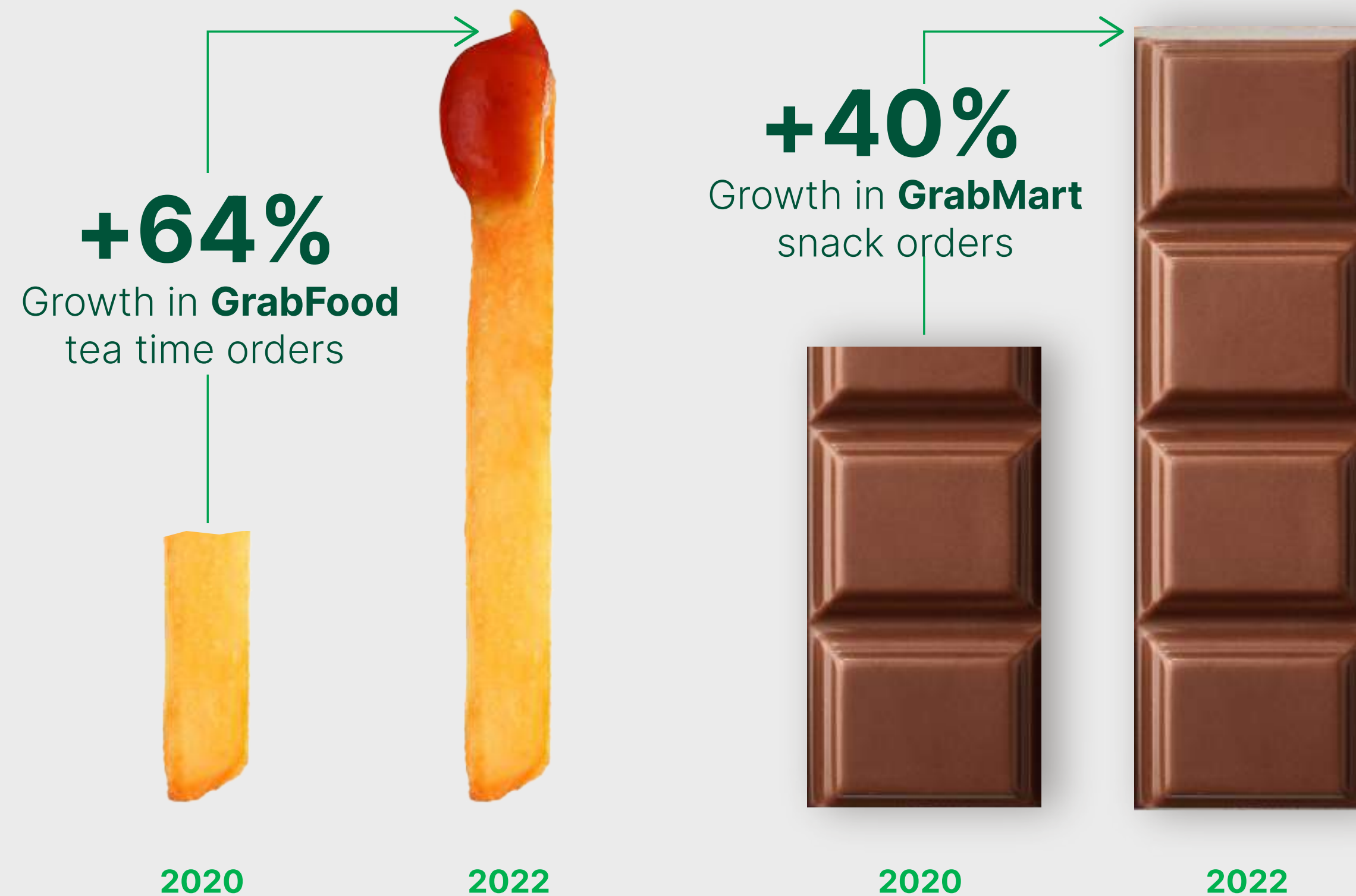




Trend #4 Snacking boosts off-peak revenue

1 in 5 Singaporeans
say that they snack at least
once a day.¹

Tea time and total snack orders on Grab saw
an overall increase between 2020 and 2022²



**Top favourite
snacks on
GrabMart?**
Ice cream, chocolate,
and yoghurt!

Source:
1. Grab survey August 2022. n=1,077 active Grab users in Singapore.
2. Grab Internal Data 2020-2022.

Snacking is not a solo activity. With workplaces reopening, 60% of consumers say that they generally tend to order for more than 1 pax¹



Source:
1. Grab survey August 2022. n=1,077 active Grab users in Singapore.

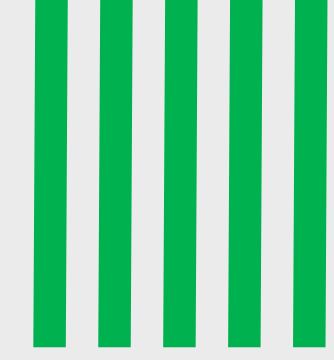
“Unilever saw on-demand ice cream orders via delivery platforms surge in the last 3 years.”

Consumers' general behaviour evolved during the pandemic. They are now prioritising happiness more than ever. We saw Southeast Asians turn to snacking as a source of comfort—looking for simple pleasures to de-stress and treat themselves.

Within the last year, we saw over 1 million ice cream orders sold on Grab's platform! We expect to see this on-demand snacking phenomenon grow further, as it's spurred by consumers' increased willingness to indulge and increased need for convenience and comfort.

Amaury Marescaux
Director of Global Ice Cream
Partnerships at Unilever





Trend #5

Delivery subscriptions are the next big thing

1 in 3 food delivery users today subscribe to a subscription plan.¹

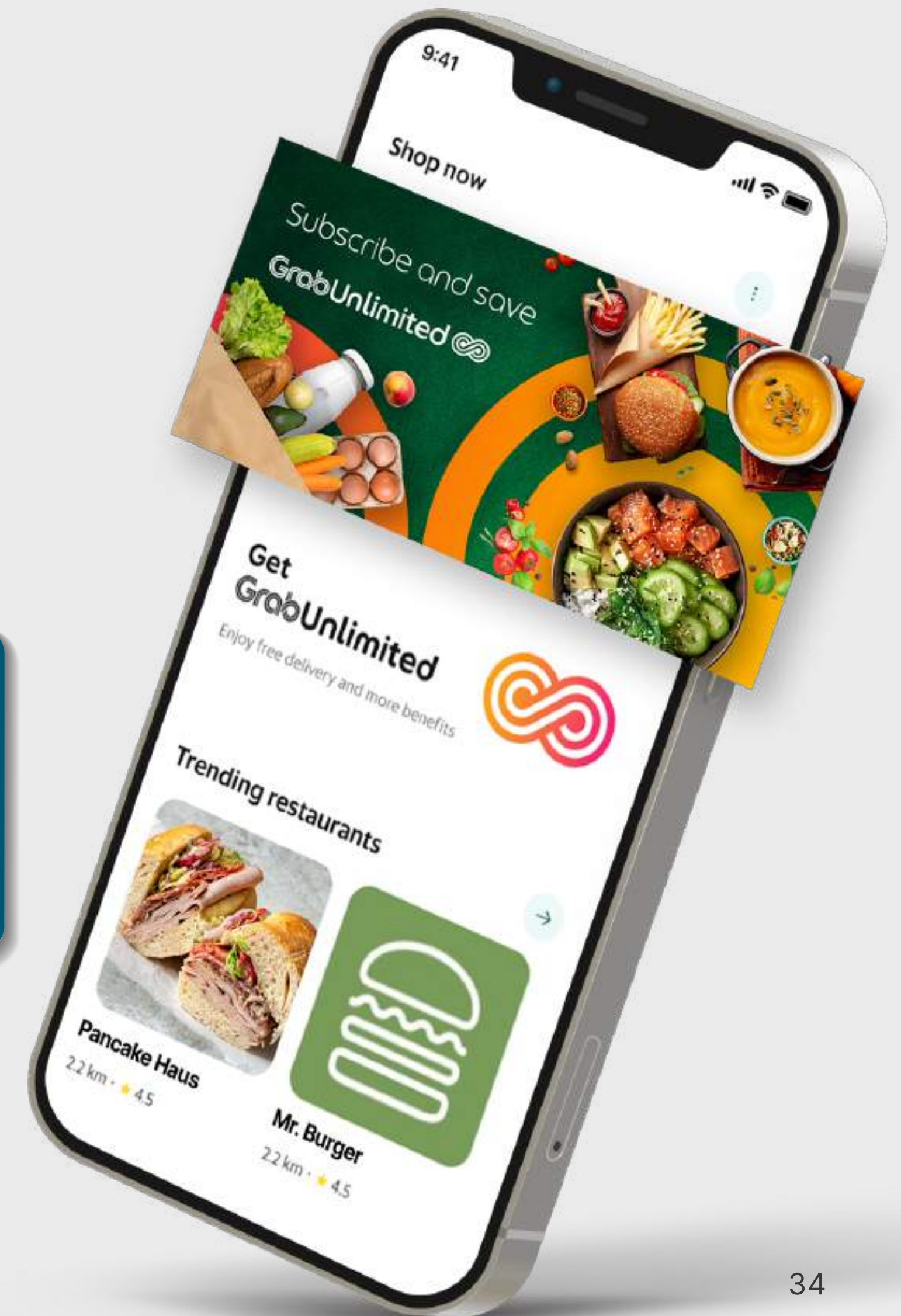
Subscribers say that they

order
44%
more often

spend
18%
more per order

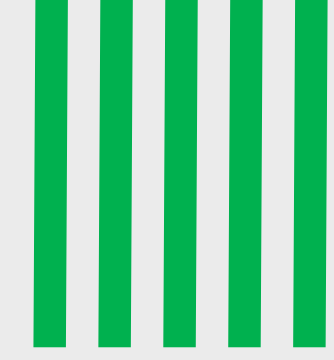
on food deliveries compared to non-subscribers¹

Want to tap onto these big spenders? Participate in promo campaigns under the GrabUnlimited subscription plan.



Source:

1. Grab survey May-June 2022, n=3,190 subscribers regionally (ID,MY,TH,SG). Based on orders and expenditure across 3 delivery subscription plans in the region.



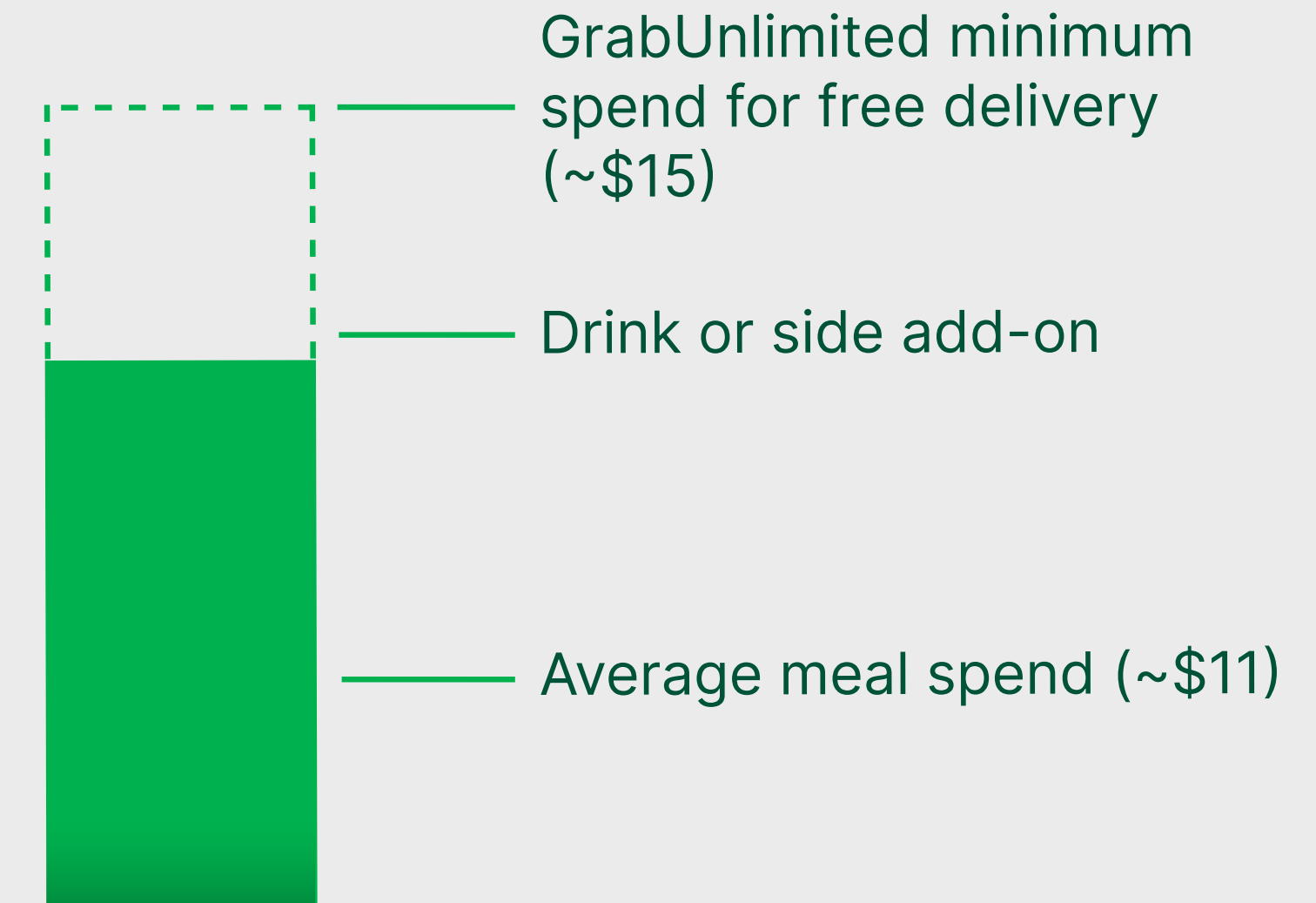
Trend #6

Add-ons help customers earn free delivery (and boosts sales!)

1 in 3 consumers say that they will switch restaurants if they're unable to hit the minimum spend for promos.¹

Source:
1. Grab survey July 2022. n=1,183 active Grab users in Singapore.
2. Grab Internal Data, 2022.

The sweet spot:
Add-ons priced
between \$4–5²



Top 3 preferred add-ons?
Snack, desserts,
and drinks¹



“1 in 5 main meals today include a non-alcoholic ready-to-drink beverage.”

At Coca-Cola, we're constantly looking at more ways to engage our consumers and meet their daily beverage needs. Recent research has shown that 57% of menu decisions are made an hour before a meal while for 75% of meal shopping occasions, the meal ingredients are determined during the shopping trip. We want our portfolio of beverages to be easily accessible to our consumers at any time of day, whatever the occasion.

We believe we can achieve this by supporting our customers and helping them grow their businesses via optimised menu executions like meal bundling or add-ons. Partnering with Grab to help our customers grow is a great opportunity for Coca-Cola to amplify these efforts and meet the evolving needs of our consumers.

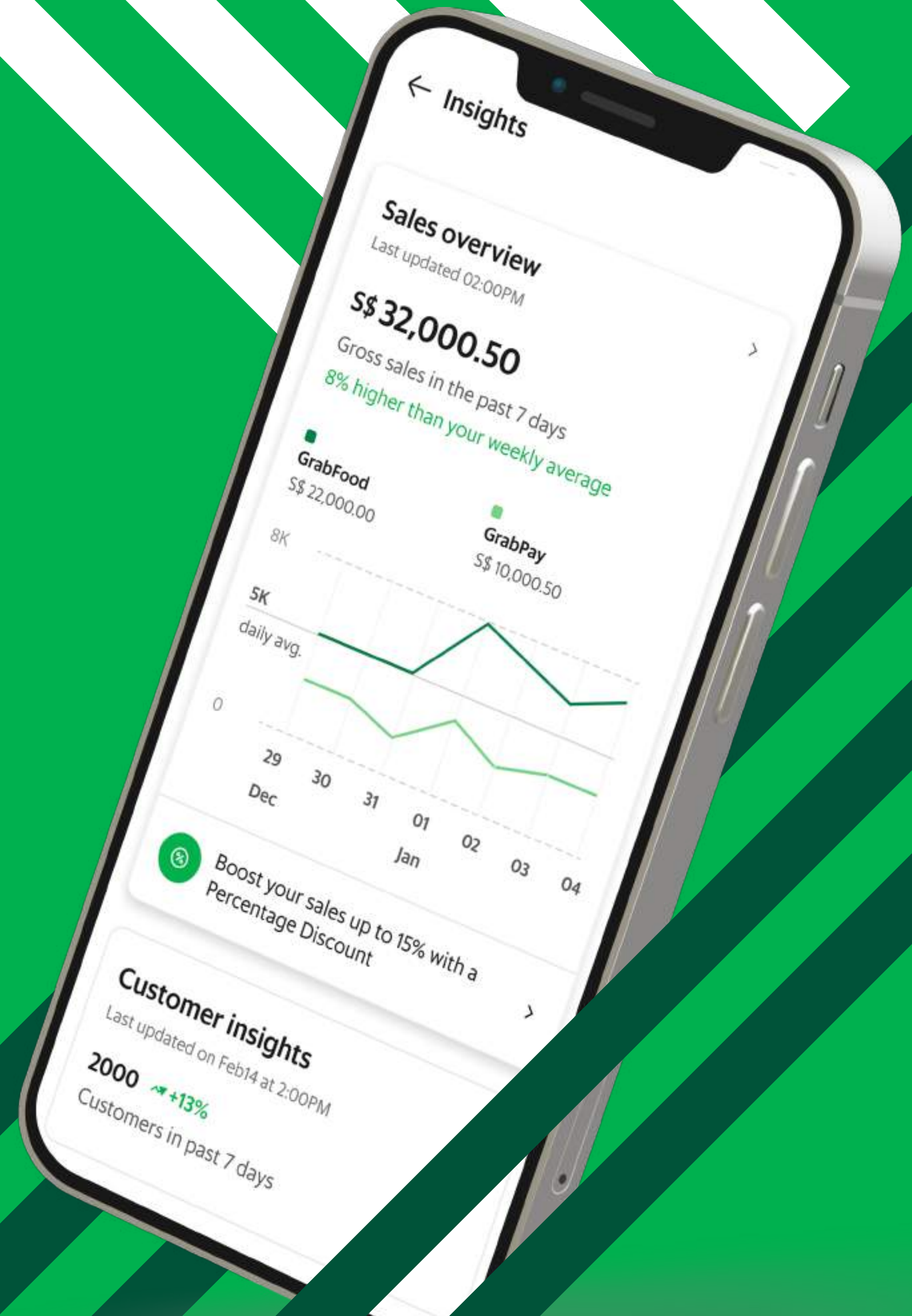
Mick Drew

eCommerce Head,
O2O (Offline-to-Online) at Coca-Cola

The Coca-Cola logo is displayed in its classic red script font. It is positioned in the lower right area of the slide, to the left of the man's portrait. The background behind the logo and the man's portrait features several diagonal red and white stripes.

05

Top Tools Every Business Should Know





Powerful new tools & features, now on the GrabMerchant app



The 'Ready' tick

Merchants now have full control over the time they need to prepare an order. They can update their order timings in-app, and mark them as ready when it's done. This helps to reduce the wait-time of delivery-partners in-store.



Chat and reviews

Directly address order issues through in-app chats with customers in real-time to deliver higher satisfaction.

Tip:
1-star rating orders can be **reduced 8x** by simply chatting with your customers¹



Social media profile integration

Merchants can improve their in-app store presence by linking their social media profiles to their GrabFood or GrabMart store profiles.

They can also create promotional content and ad visuals on Grab and share them to their social channels.



The 'Insights' tile

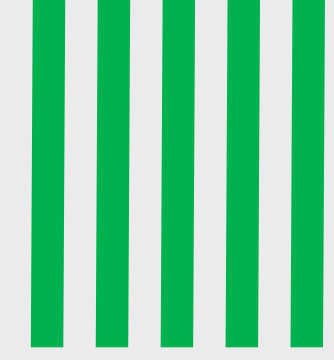
Review business performance, get insights on Grab's audience segments, trending orders, total cancellations, and more.

Source:
1. Grab Internal Data 2021-2022.

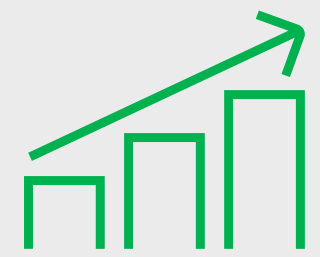
06

How to Get Ahead with GrabAds





Reach eaters across Singapore with GrabAds



Drive real world sales

Measure your GrabAds performance in terms of meals ordered, not just impressions served.



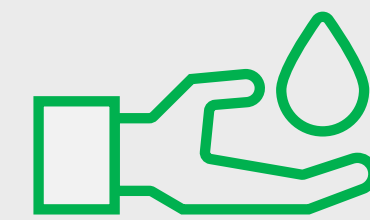
Launch with a bang

Launch new products, meal deals, and more with high impact formats that engage and influence eaters across their entire journey—both in-app and in real life.



Run with real data on real eaters

First-party insights based on millions of in-app transactions can help you reach loyal or lapsed customers, fast food fans, food-curious newbies and more—cookie-free.



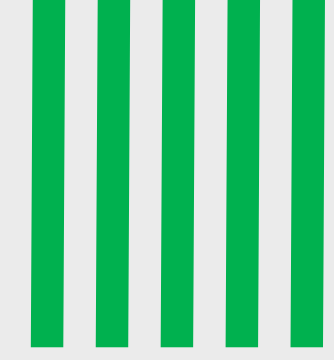
Drive sampling on demand

Entice consumers to try your new products! Grab's network of merchant retailers and riders can get samples in consumers' hands on-demand.



Expand physical distribution

Partner with our GrabFood or GrabMart merchant-partners to add your products to their menus or inventory. You can also set up and promote your own virtual outlet within the Grab app.

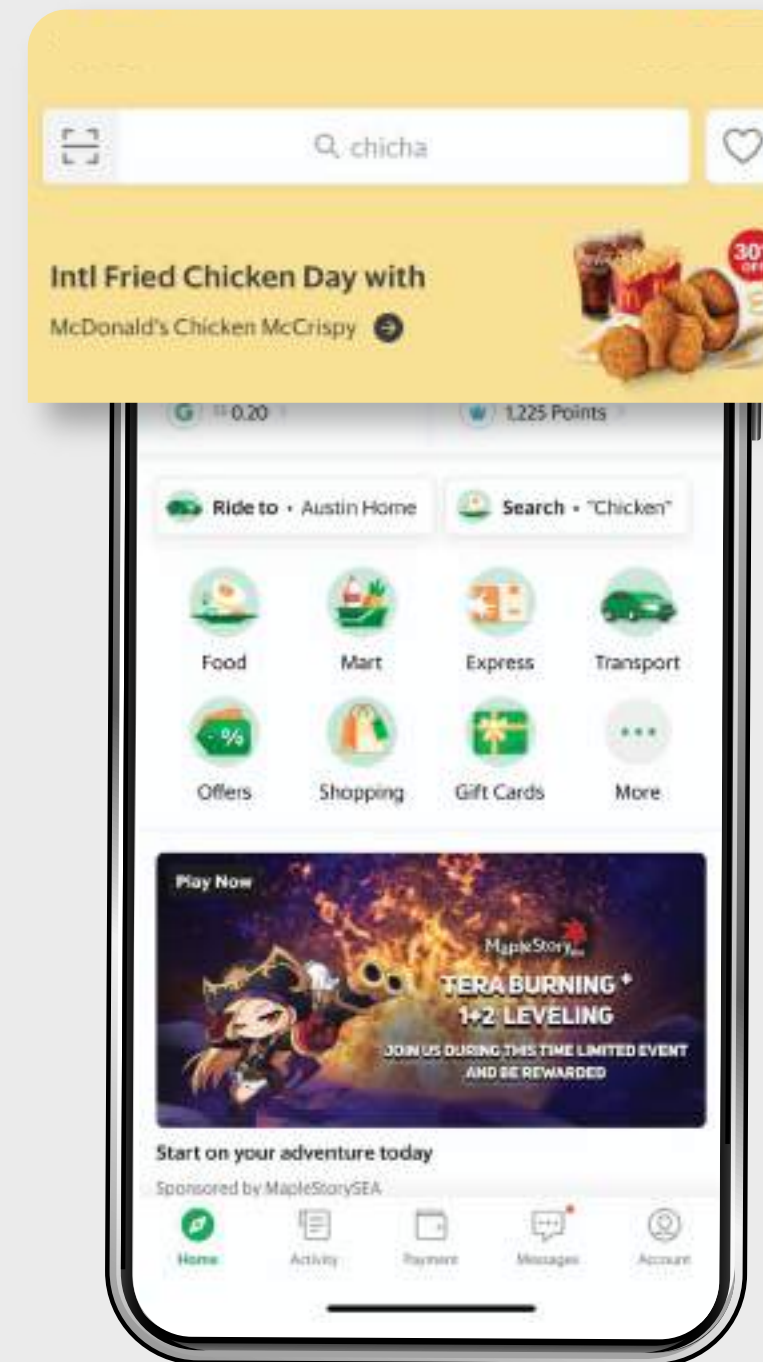


Case Study: Maximising awareness and sales for any new menu launch

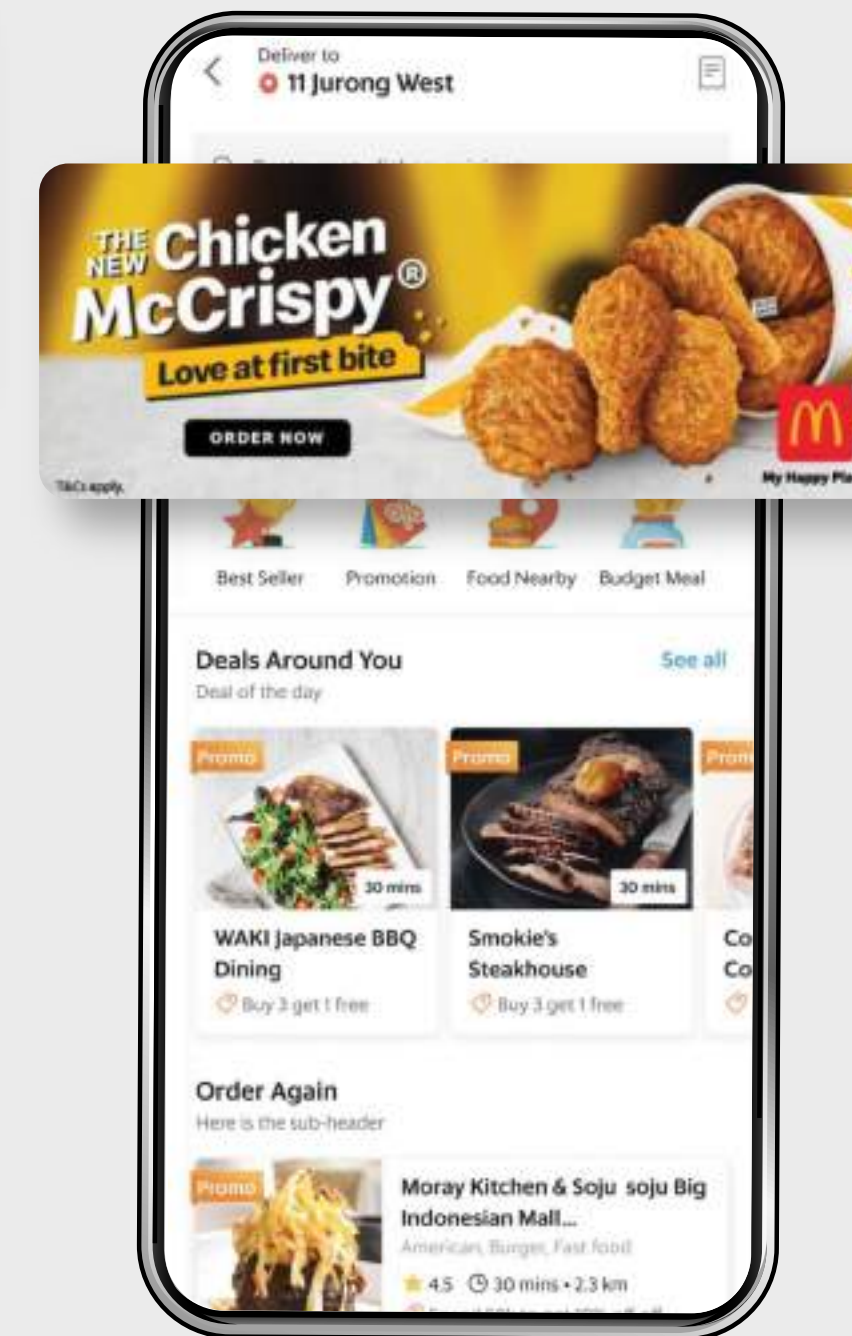


Singapore

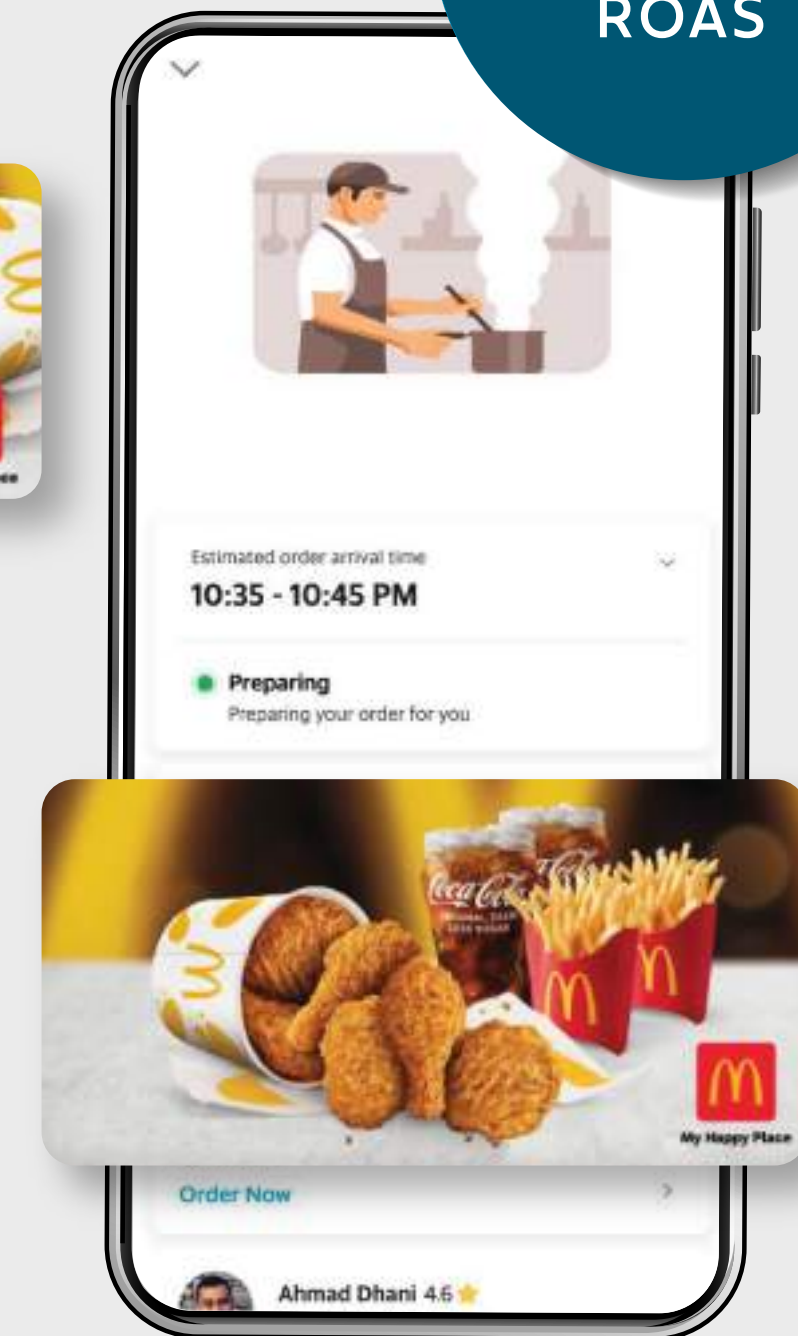
McDonald's Singapore partnered with GrabAds to launch their McCrispy with a full-funnel advertising strategy targeting every stage of the customer journey.



Masthead

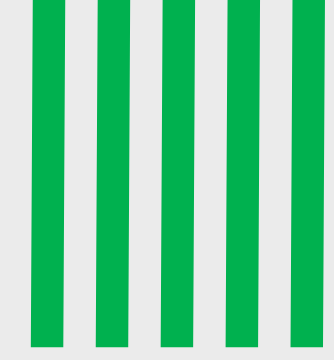


Food Banner



In-transit Ad

41.8x
ROAS

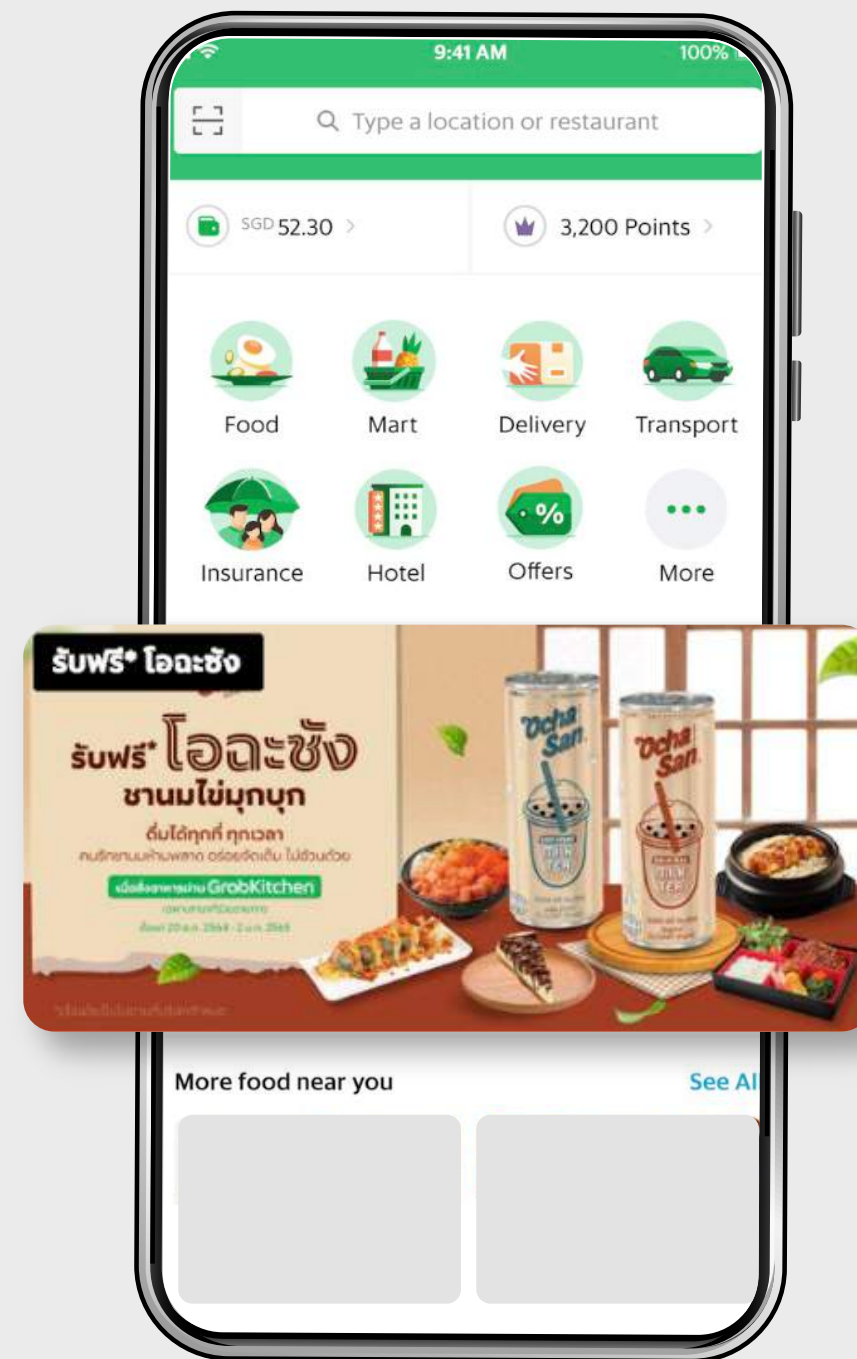


Case Study: Online-to-offline sampling for innovative new products

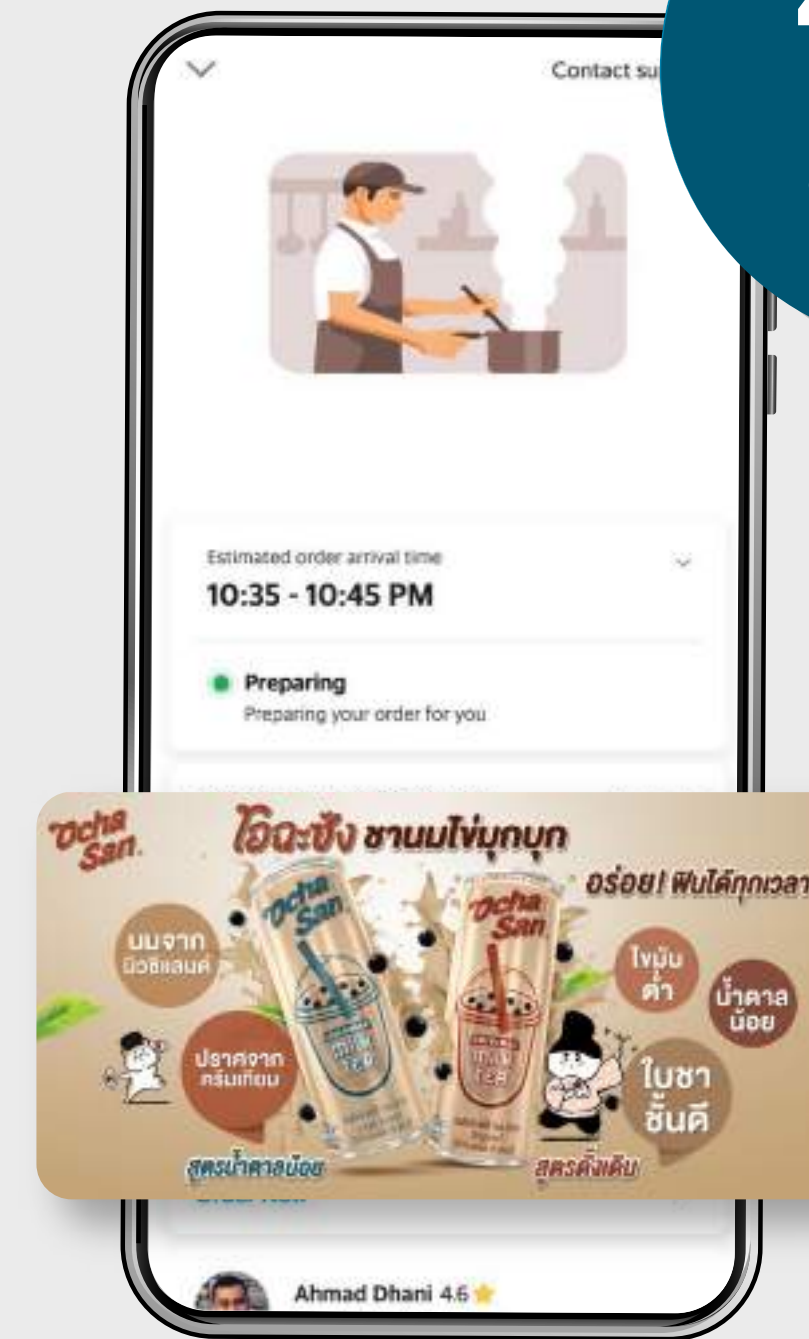


Thailand

OchaSan Thailand partnered with GrabAds to help customers get their hands on free samples of their new, guilt-free, ready-to-drink bubble tea.

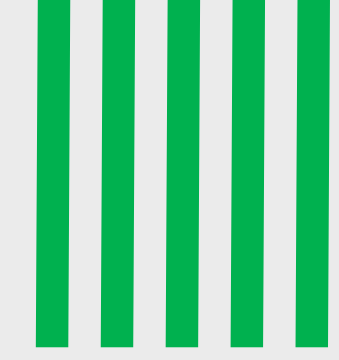


Mart Banner



In-transit Ad

45K
Samples
delivered



Case Study: Inspiring shoppers with shoppable recipes on GrabMart

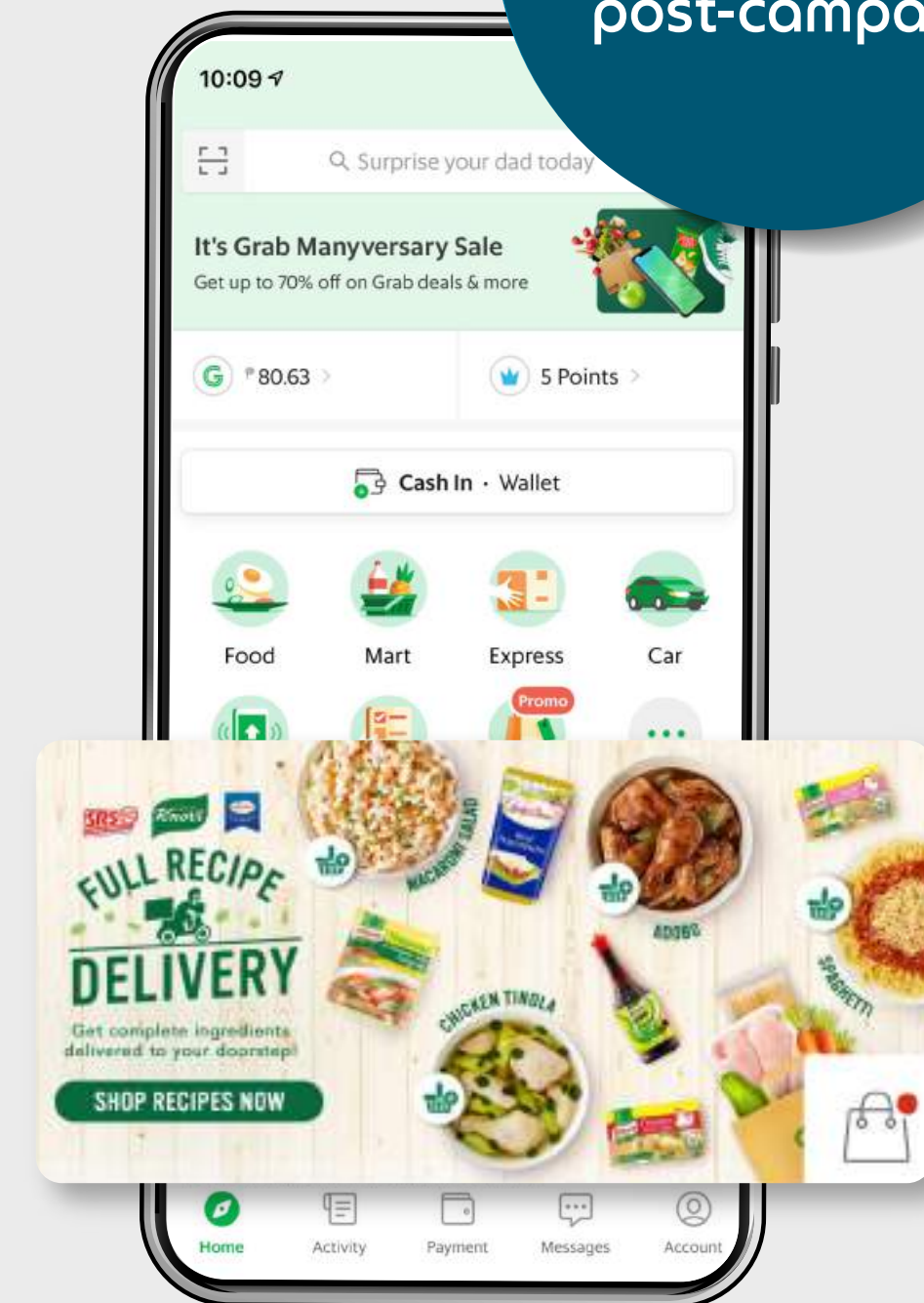


Philippines

Knorr Philippines partnered with GrabAds to promote “shoppable recipes” that help users decide what’s for dinner. Consumers can click on the cards to shop the recipe by adding ingredients to their baskets, including time-saving Knorr favourites.



Inbox Banner



Mart Banner

9x
Increase in GMV
post-campaign

Grab is a leading superapp platform in Singapore, providing food, grocery, parcel deliveries, mobility, as well as financial services.

Category Leader
across deliveries, mobility, and E-wallets¹

6.1M App Downloads²

1.7x more than
closest competitor²

1.7x more MAUs³

than closest
competitor³

**Not yet a
GrabAds partner?**

Get in touch here:
grabads@grab.com

Source:

1. Based on Euromonitor's independent analysis, Grab continued to be the category leader in 2021 by GMV in online food delivery and ride-hailing, and by TPV in the e-wallet segment of financial services in Southeast Asia, despite increased competition.
2. Average of Sensor Tower and data.ai, total app downloads from 1 January 2012 to 31 March 2022.
3. Average of Sensor Tower and data.ai, average monthly active users for Q1'22.