



Grab

SEA 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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01

Deliveries After COVID-19: Appetites Continue to Grow





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

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

On GrabFood,
consumers ordered

1.48x 

more often in 2022
compared to 2019¹

On GrabMart,
consumers ordered

1.53x 

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

18%

(2022 vs 2019)



On GrabMart,
average basket
sizes grew

28%

(2022 vs 2020)



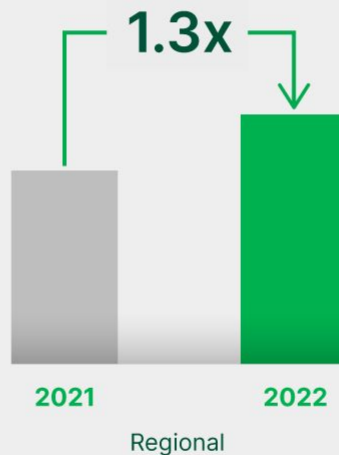
Source:
1. Grab Internal Data, 2019-2022 (monthly average).



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 Southeast Asians 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=26,800 active food delivery users regionally.



Singapore,
Vietnam, and
Thailand are
the biggest
spenders
when it comes
to deliveries¹

Frequency of
food and grocery
delivery

Delivery expenditure by markets



Average monthly expenditure on
food and grocery delivery (USD)

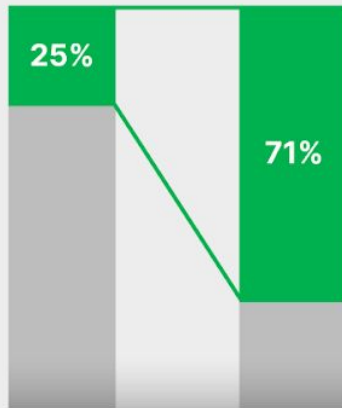
Source:

1. Grab survey H1 2022, 44,266 food and grocery delivery users regionally [ID 16,151; SG 4,679; MY 6,924; TH 5,787; PH 5,869; VN 4,856].



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

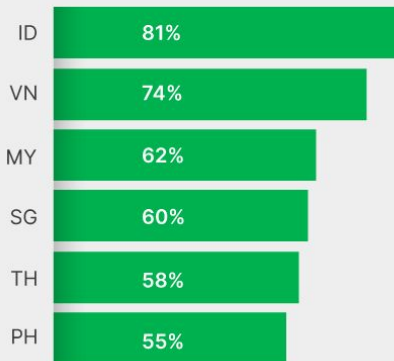


Source:

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

Young families rely on deliveries the most, especially in Indonesia¹

Percentage of heavy delivery app users married with kids



Heavy food delivery users make

>6x

online food delivery orders a month

Top 3 reasons of ordering

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

Heavy grocery delivery users make

>10x

online grocery delivery orders a month

Top 3 reasons of ordering

- Special promotions
- Easy way to try new products
- Quick solution for special/festive occasions

Source:

¹ Grab survey H1'22, n=10,832 heavy food and online grocery delivery users regionally [ID 3,931; SG 1,139; MY 1,675; TH 1,432; PH 1,464; VN 1,191].



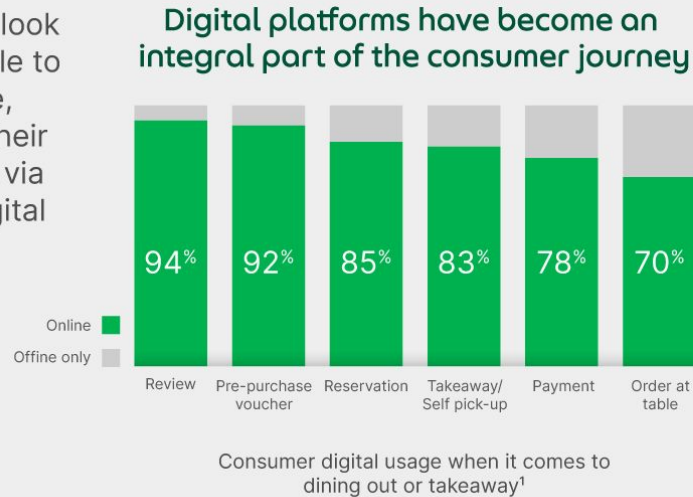
02

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.



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, 8,452 active Grab users regionally [ID 1,590; SG 1,183; MY 1,459; TH 1,831; PH 1,698; VN 691].



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

17mins

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/business/ads/

Source:

1. Grab survey July 2022, 8,671 active Grab users regionally [ID 1,870; SG 1,183; MY 1,555; TH 1,954; PH 1,698; VN 691].

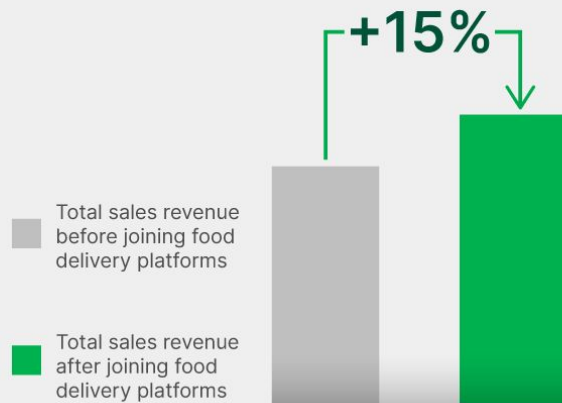
2. Grab Internal Data, 2021-2022.



8 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

3rd party delivery apps continue to drive incremental revenue to merchants¹



Source:

1. Grab survey September 2022, n= 662 active Grab merchants regionally [ID 140, SG 50, MY 170, TH 130. VN 47, PH 125].

“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





Trending food orders across the region

Singapore

- 1 Burger
- 2 Coconut shake 📈
- 3 Prata
- 4 Ice cream
- 5 Nuggets 📈

Thailand

- 1 Thai milk tea
- 2 Fried chicken 📈
- 3 Coffee
- 4 Papaya salad
- 5 Curry noodles

Malaysia

- 1 Fried chicken
- 2 Fried rice 📈
- 3 Burger
- 4 Roti canai
- 5 Nasi lemak

Indonesia

- 1 Fried rice
- 2 Tea
- 3 Fried chicken
- 4 Spicy noodles 📈
- 5 Fried cheese shrimp 📈

Vietnam

- 1 Milk tea
- 2 Grilled pork rice 📈
- 3 Fried chicken
- 4 Bánh mì 📈
- 5 Vietnam coffee

Philippines

- 1 Fried chicken 📈
- 2 Burger
- 3 Pasta
- 4 Ice cream
- 5 Coffee 📈

The amount of coffee and tea ordered in 2022 is enough to fill up **6 Olympic-sized** swimming pools!



Southeast Asians can't get enough of fried chicken – an average of **500 pieces** of fried chicken are ordered every minute on GrabFood!





Trending mart orders across the region

Singapore	Thailand	Malaysia	Indonesia	Vietnam	Philippines
1 Yoghurt	1 Cooking oil	1 Vegetables	1 Instant noodles	1 Beer	1 Bread
2 Cooling water	2 Bottled water	2 COVID-19 test kit	2 Vegetables	2 Pork	2 Carbonated drinks
3 Covid test kit	3 Carbonated drinks	3 Chicken	3 Coffee	3 Fruits	3 Chips
4 Sashimi	4 COVID-19 test kit	4 Bread	4 Rice	4 Vegetables	4 Bottled water
5 Chrysanthemum tea	5 Sugar	5 Fruits	5 Cooking oil	5 Condensed milk & creamer	5 Instant noodles

More than
8,500 COVID-19
test kits were
sold everyday
across the region
in 2022



04

Top Trends to Supercharge Store Sales

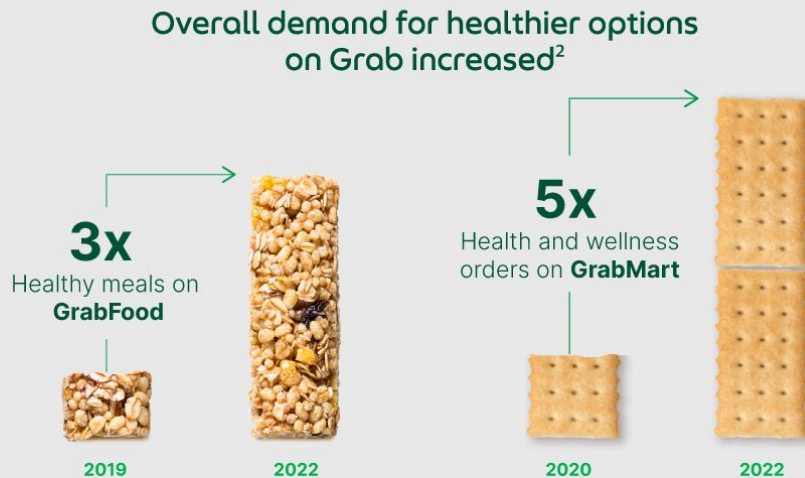




Trend #1

Healthy and plant-based alternatives are no longer niche

86% of consumers say that they consume at least 1 healthy meal every 2 to 3 days.¹



Based on healthy-related food orders on GrabFood, **Singapore has the highest reception towards healthy eating**, followed by Malaysia and Thailand²

Source:

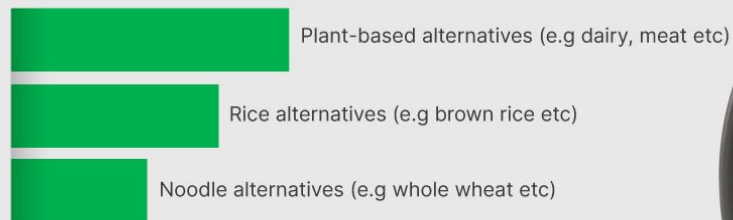
1. Grab survey July 2022, 5,317 active Grab users regionally [ID 678; SG 1,729; MY 893; TH 798; PH 683; VN 536].

2. Grab Internal Data, 2019-2022.

1 in 2 Southeast Asian consumers have tried plant-based options in the last 6 months¹

Plant-based alternatives emerge as top choice when it comes to opting for healthier substitutes¹

Most popular healthy substitutes made regionally



Source:

1. Grab survey July 2022, n=8,671 active Grab users regionally [ID 1,590; SG 1,183; MY 1,555; TH 1,954; PH 1,698; VN 691].

“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 across
Southeast Asia prefer ordering
in for social gatherings instead
of eating out.¹

Regionally on **GrabFood**,
large-sized weekend orders
to residential areas surged by

2x 

between 2020 and 2022²

2022

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

2020

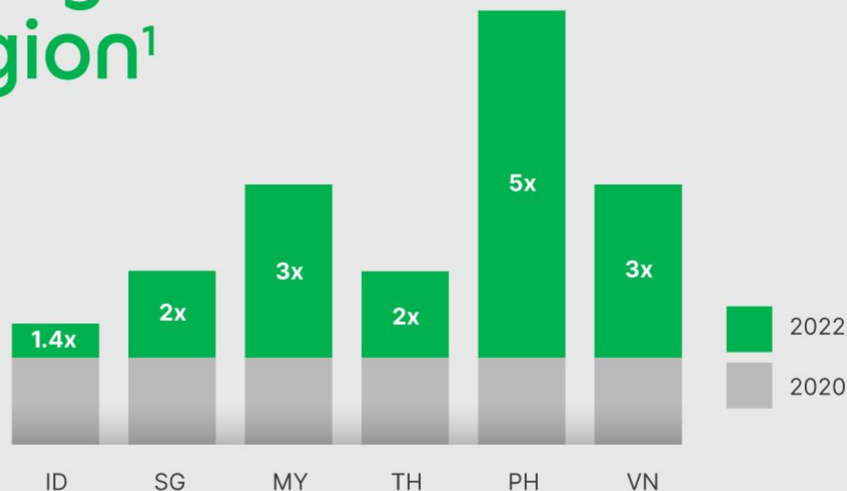
Source:

1. Grab survey August 2022, n=1,813 active Grab users regionally [ID 309; SG 826; MY 383; PH 547; TH 330; VN 244].

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

Filipinos are the biggest party hosts in the region¹

Increase in large-sized GrabFood orders on weekends to residential areas between 2020 and 2022¹



Source:

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



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 key items Southeast Asians want to customise are³:

- Sugar level
- Spiciness level
- Ice level
- Types of sauce
- Types of topping

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=8,671 active Grab users regionally [ID 1,590; SG 1,183; MY 1,555; TH 1,954; PH 1,698; VN 691].

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

3. Grab survey July 2022. n=5,979 active Grab users regionally [ID 1,405; SG 672; MY 990; TH 1,405; PH 1,090; VN 417].

“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



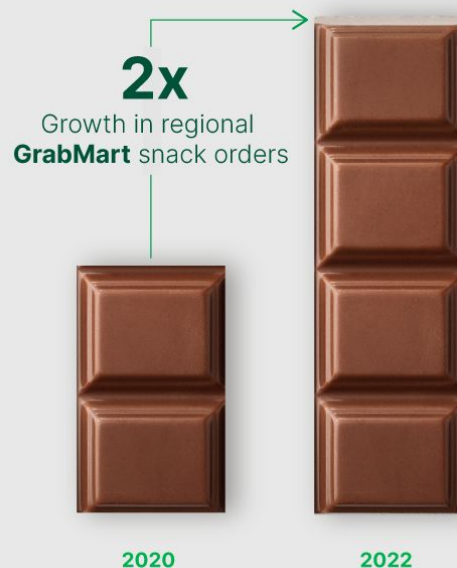


Trend #4

Snacking boosts off-peak revenue

Regionally, 2 in 5 consumers 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



Source:

1. Grab survey August 2022. 6,769 active Grab users regionally [ID 1,143; SG 1,077; MY 1,844; TH 1,417; PH 1,348; VN 1,017].

2. Grab Internal Data 2020- 2022.




Trending snacks on GrabMart across the region

Singapore	Thailand	Malaysia	Indonesia	Vietnam	Philippines
1 Ice cream	1 Potato chips	1 Pastries	1 Instant noodles	1 Sweets	1 Milk
2 Chocolates	2 Coffee	2 Fruits	2 Peanut pie	2 Cookies	2 Bread & pastries
3 Yoghurt	3 Ice cream	3 Carbonated drinks	3 Peanuts	3 Traditional cakes	3 Carbonated drinks
4 Cheese and crackers	4 Carbonated drinks	4 Chicken popcorn	4 Chocolates	4 Rice cakes	4 Potato chips
5 Popcorn	5 Juice	5 Chocolates	5 Almond cheese cookies	5 Chocolates	5 Instant noodles



Snacking is not
a solo activity.
With workplaces
reopening, **63%**
of consumers say
that they generally
**tend to order for
more than 1 pax¹**

A hand is shown reaching into a white cardboard box filled with various donuts. The donuts have different toppings: white with colorful sprinkles, plain white, yellow with black sprinkles, brown with pink stripes, pink with white sprinkles, and white with orange stripes. Another hand is visible at the bottom right, also reaching towards the donuts. The background features green diagonal stripes.

Biggest snackers?
Filipinos! **74%**
tend to order for
more than 1 pax.

Source:

1. Grab survey August 2022. 6,769 active Grab users regionally [ID 1,143; SG 1,077; MY 1,844; TH 1,417; PH 1,348; VN 1,017].

“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

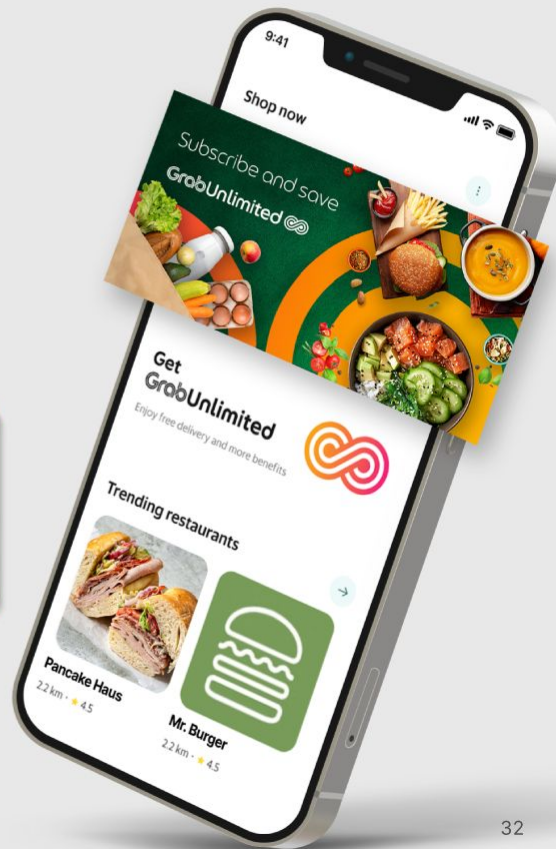
Subscribers say that they

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

Offer add-ons to help consumers meet minimum spend



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



Source:

1. Grab survey July 2022, 8,671 active Grab users regionally [ID 1,590; SG 1,183; MY 1,555; TH 1,954; PH 1,698; VN 691].

“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



05

Key Implications for Brands and Marketers





Highlights from the report



Make sure you're discoverable

74% of consumers open the delivery app without any restaurant or store in mind—this is a great opportunity to get ahead of them and drive conversions for your brand.



Cater to young families

Young families rely on deliveries the most in order to save time and the hassle of cooking. Appeal to parents in order to tap onto this audience segment.



Tap onto subscriptions

1 in 3 food delivery users subscribe to a subscription plan, and these users tend to order more and spend more. Tap onto subscription promotions to appeal to these heavy users.



Offer a variety of add-ons

Consumers are constantly looking for ways to hit minimum spend for free delivery promos. Offer them the flexibility of add-ons by introducing a variety of side dishes and drinks.



Ride on key festivities

Festivities are periods when demand peaks. Ride on this demand surge by offering bundles or sharing options for larger groups.

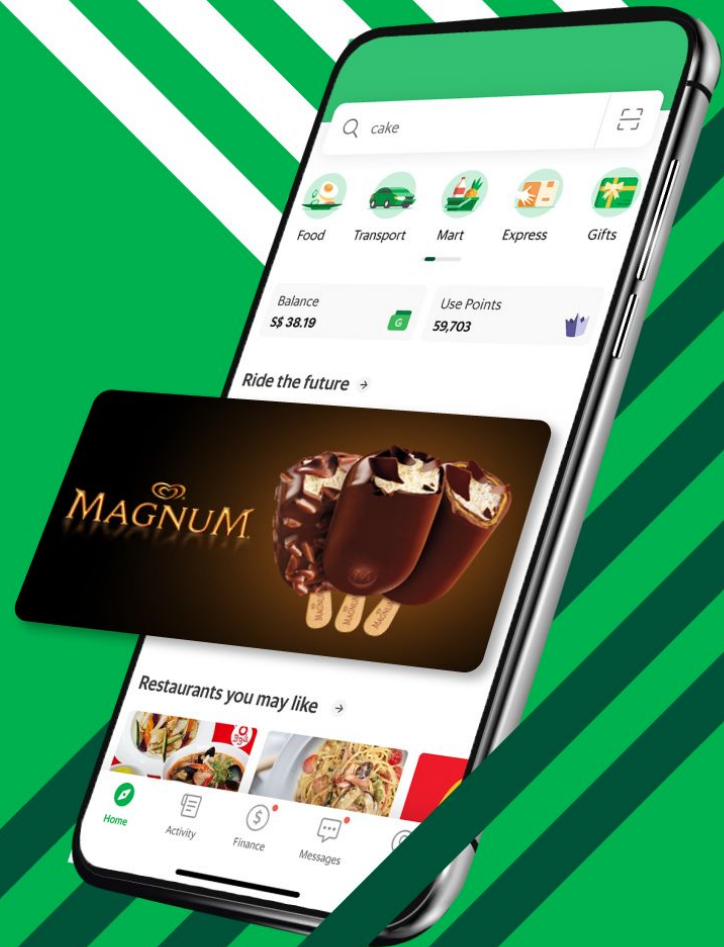


Leverage on off-peak timings

Snacking occasions are on the rise, especially post-lunch pick-me-ups with more returning to the workplace. Consider introducing off-peak and tea time offerings to grow overall demand.

06

How to Get Ahead with GrabAds





Reach eaters across Southeast Asia 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.

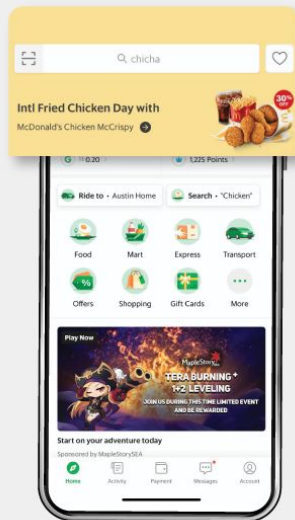


Case Study: Maximising awareness and sales for any new menu launch

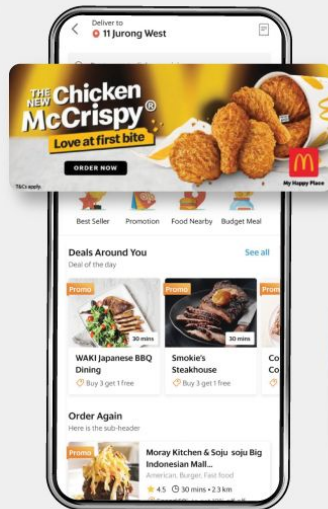


Singapore

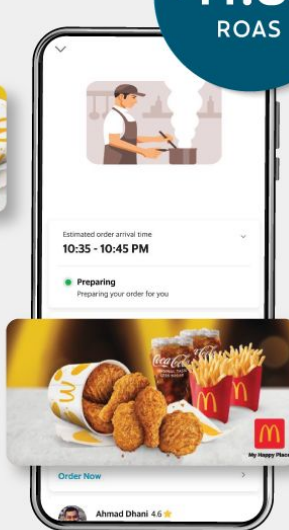
McDonald's Singapore partnered with GrabAds to launch their McCrispy with a full-funnel advertising strategy targeting every stage of the customer journey.



Masthead



Food Banner



In-transit Ad

41.8x
ROAS

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

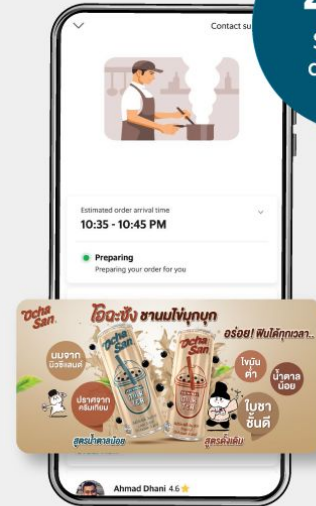


Thailand

Ocha San 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

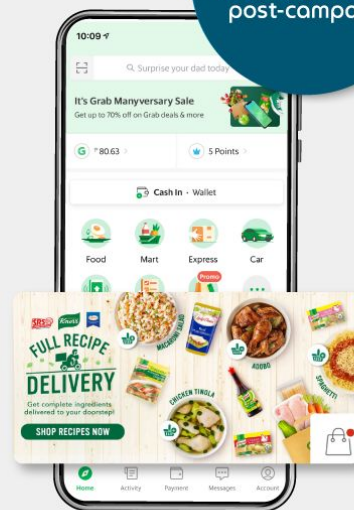


Philippines

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 SEA, providing food, grocery, parcel deliveries, mobility, as well as financial services.

Not yet a
GrabAds partner?

Get in touch here:
grabads@grab.com