



# Delivery & retail trends in APAC

Insights on customers' purchasing behaviours, emerging trends, and growth opportunities\*



# APAC's on-demand ordering revolution: fast, convenient, and here to stay

The Q-Commerce Boom

**\$72 Billion**

The expected value of Q-Commerce by 2025

## On-demand delivery surge

Accelerated by the pandemic & driven by the rise in delivery platforms and the need for convenience.\*

## Convenience at your fingertips

Food, groceries, essentials, electronics and more are now delivered to your doorstep in under an hour\*\*

The thriving industry coupled with foodpanda's extensive data, give us valuable insights into the APAC consumers' habits and the overall trends in on-demand delivery.

This report explores the 2023 trends identified by foodpanda across its 11 markets.\*\*\*

\*Source: Mordor Intelligence

\*\*Source: McKinsey

\*\*\*Singapore, Malaysia, Hong Kong, Taiwan, Thailand, Philippines, Cambodia, Laos, Myanmar, Pakistan, and Bangladesh.



# Q-Commerce: A convenient opportunity



“ All around the globe, lifestyles are changing and so too is customer behavior. **Speed and convenience** is becoming more important than ever before.

We have now entered **the era of quick commerce**. This category offers tremendous opportunity that has gone largely untapped. ”



**Niklas Östberg,**  
Co-founder and CEO,  
Delivery Hero



# The Q-Commerce wave

## Quick commerce (Q-Commerce):

A rapid delivery service that delivers groceries and essentials within an hour or less or less to meet the growing demand for fast, convenient shopping experiences.

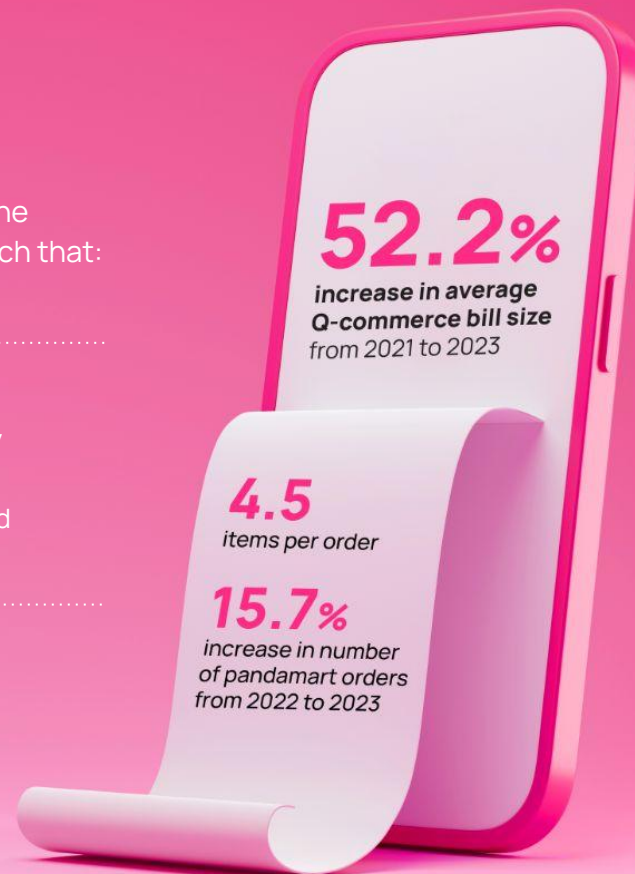
Originally a necessity during the pandemic, the convenience of Q-Commerce has evolved such that:



**3 out of 5** consumers in APAC would rather shop online than in-store



A larger share of **time and monthly budgets** are now spent on on-demand delivery apps\*



foodpanda is a Q-Commerce leader in APAC with a **growing, highly-engaged audience** ready to spend on convenience!



## On-demand food delivery: Craving meets convenience

On-demand food delivery continues to be the strongest component of the q-commerce growth, fueled by:

- The ever increasing digitally savvy, mobile first consumer base across APAC
- The steady rise & growth of food delivery apps
- The provision of unlimited choices & convenience offered by the food delivery apps.

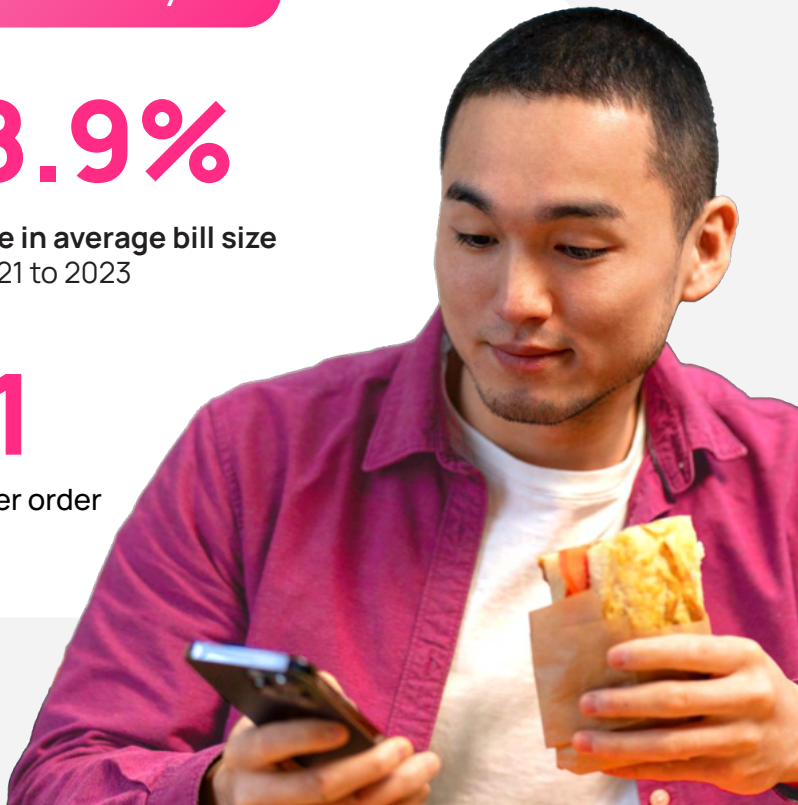
Food delivery

# 28.9%

increase in average bill size  
from 2021 to 2023

# 2.1

items per order



Target the right foodpanda customers to achieve your campaign goals **based on spending habits, brands/products purchased, cuisines, and more.**



# APAC's food delivery & consumption patterns



“ Food delivery in Asia is characterised by high frequency and variety, with consumers frequently ordering not just dinner but also lunch and even breakfast through delivery apps. This reflects a broader trend towards convenience and instant gratification. ”

McKinsey & Company



## On-demand delivery: Fueling weekend feasts and weekday preps

**Weekends drive food delivery surges** by offering hassle-free convenience for social gatherings.

Conversely, driven by post-weekend meal preparation and the planning for the week ahead, **grocery deliveries peak from Sundays to Tuesdays.**



# 10%

**more food & grocery** delivery orders are placed on Fridays & weekends



Maximise campaign impact by **targeting peak consumer volumes for visibility, engagement, and conversions.**



## Subscribing to convenience

On-demand delivery platforms are seeing an exponential growth in subscriptions, reflecting rapid user adoption and a larger pool of engaged daily users.

**panda***pro* subscribers

compared to non-subscribers

**3.6X** GMV

**2.7x** Order frequency



Leverage panda ads to target **pandapro customers** and identify your high-value audience.





# Exploring APAC's order basket



“ Food consumption patterns reveal much about consumers' lifestyles, preferences, and even values. By analyzing what people eat, brands can gain **insights into their health consciousness, cultural influences, and even economic status.** ”

**Nielsen IQ**



# What are people **searching for** in APAC?

## Top searched food items



**Pizza**



Burger



Cake



Sushi



Drinks

**Fun facts**

Pizza was searched **over 17 million times**

## Top searched grocery items



**Milk**



Bread



Eggs



Ice cream



Noodles

**Fun facts**

Milk was searched **over 1.8 million times**



Customers' searches offer **insights into their demands, needs and customers journey**



# Here's what **APAC** craves

## Top food delivery orders



Burger



Fried Chicken



Pasta



Rice noodles



Pizza

### Fun facts



Customers in **Taiwan** snack **3.7x** more than the APAC average.



**Hong Kong** customers order **>10,000** bowls of rice noodles daily.



The average customer from the **Philippines** orders fast food every week, **>3x** the APAC average.



Tap into foodpanda's diverse customer base to **target by cuisine, dietary needs, and order habits**, making your brand a perfect match for every taste.



# What does APAC's grocery list look like?

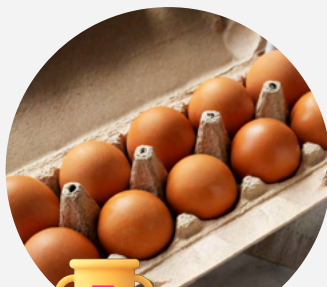
## Top grocery orders



Fruits & vegetables



Tea & coffee



Eggs



Beer



Mineral water

### Fun facts



30 bags of chips are sold every minute.



Our new customers frequently purchase health and **feminine hygiene products** through pandamart.



**Durian** is the most popular fruit among customers in Singapore.



Use panda ads to target foodpanda customers by **intent and past purchases** to boost your campaign's visibility.



## Key takeaways



### From offline to online

As more people are shopping online, it's key to **connect with customers where they spend most of their time and money**—online!



### On-demand convenience

As the overall user base and average spending steadily grow on on-demand delivery platforms, it's essential to focus on **reaching high-value customers in the right places**.



### Timing is everything

**Reach high-intent customers when they're most active and receptive**, like on weekends when demand for food delivery spikes significantly.



### Diverse tastes, varying demands

With a diverse range of preferences across APAC, effectively **leverage the power of past purchase and purchase intent data** to tailor your campaigns to the people who matter.



# Capitalise on the ever growing APAC retail market with **panda ads**

“ Leveraging the rapid growth of quick commerce, **we help brands reach millions of tech-savvy, high-intent customers**, connecting them in ways that were not possible before. ”

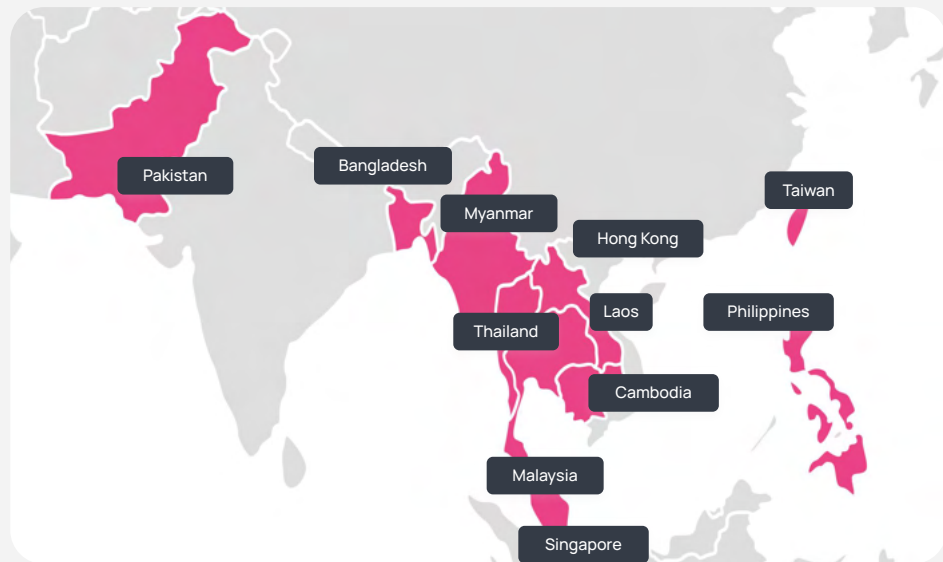


**Wen Zhe Lim,**  
Director, Advertising &  
Partnerships  
foodpanda



# Food, groceries, & results, **delivered!**

foodpanda is not just Asia's leading food & grocery delivery platform, we enable brands to connect with our diverse audience and drive growth through **in-app advertising, digital marketing channels, and strategic partnership programmes.**



..... Supercharge your media investments across APAC with **panda ads** .....



**11**  
markets



**125M**  
app  
downloads



**33M**  
monthly  
active users



**400+**  
cities



# Boost your brands by tapping into Asia's largest food & grocery delivery network\*

Supercharge your campaign by leveraging the latest trends with **panda ads** by



Reaching out to **millions of customers** when they are most active



Using first-party data to **target 'ready to shop' audiences** based on their behaviour, demographics and more



Utilising the power of our **full-funnel and multi-channel solutions**



**Tailoring your campaign** to your marketing objectives and needs





We don't like to boast about our clients...



... OK, maybe just a little bit!



# In panda ads we trust



“ foodpanda is a dream to work with—**insights-driven recommendations**, agile pivots where needed, and diligently looks over end-to-end execution until campaign end. ”



**Denise Recomono**,  
e-Commerce Senior Manager,  
The Coca-Cola Company

“ We needed a fresh approach for our product launch and that’s exactly what we got. panda ads helped us **cut through the noise and immediately drive trial and conversions**. ”



**Leslie Tsoi**,  
Customer Development Manager, Digital Commerce  
Mars

“ panda ads greatly enhanced our customer acquisition initiatives, by capturing audience’s interest and fostering **heightened user engagement**. ”



**Jessica Faye Tan**,  
Managing Director,  
Moneymax



# panda ads Case studies



# Increasing product usage with order-tracking-page ad and full page pop-up

**The client** Visa is a leading global payments technology company.

**The goal** Visa wanted to use panda ads to **increase card usage** among existing customers and **build customer loyalty**.

**Our approach** We ran a **full page pop-up ad with an attractive offer** to incentivise Visa card payment. We then used an **order-tracking-page ad with a second offer** to encourage customers to switch payment method.

**Campaign objectives**  
Usage  
**Target market**  
Cambodia

**3M**

impressions (targeted)



**2.3%**

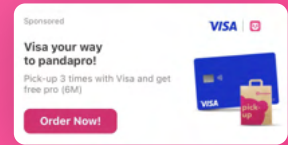
click-through rate\*  
mid-campaign  
(highest week 2.8%)

\* CTR varies depending on the marketing message / incentive / partner etc

# VISA



Full page pop-up



Order-tracking-page ad



ACELEDA Bank



CUB Bank



AEON SPB Bank



ABA Bank

Visa's socials

# Driving growth and brand performance with a full-funnel campaign

**The client** Coca-Cola has been refreshing the world for over 136 years.

**The goal** The Coca-Cola Company wanted to **drive sales and brand awareness** in the Philippines with its #BetterwithCoke campaign.

**Our approach** We built a **full-funnel campaign** pairing Coca-Cola with cuisine favourites. We used all channels for maximum reach: **CRM ads, online branding, social media, in-app ads, influencers, PR drops and vouchers.**

Offline, we used **roadside billboards and digital out-of-home** and **condo ads** to maximise awareness.



**46.5%**  
YoY sales growth



**95M+**  
impressions



**3x**  
new merchants

THE *Coca-Cola* COMPANY

Awareness

Consideration

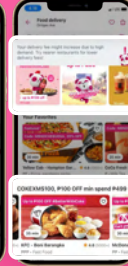
Conversion



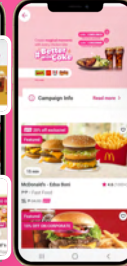
Socials



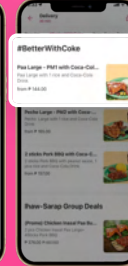
Full page pop-up



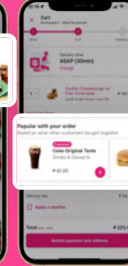
Carousel & swimlane



Landing page



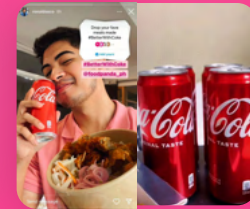
Menu



Cart upsell



OOH



Influencers



PR

# Reaching new customers & driving sales with interactions at every touchpoint

**The client** Carlsberg Group is a world-leading brewery group.


**The goal** Carlsberg Group wanted to **acquire new customers** and **boost pandamart sales** in Singapore, Malaysia and Hong Kong during the English football season.

**Our approach** We used a range of touchpoints to reach foodpanda customers and boost visibility, particularly at weekends. Including **order-tracking-page ads**, **EDMs**, **in-app splash**, **push notifications**, and **pandamart assets**.

**Campaign objectives**  
Acquisition

**Target market**  
Singapore, Malaysia,  
Hong Kong

  
**38%**  
growth in new-to-brand customers

  
**28%**  
increase in sales

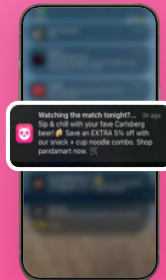
  
**8.7x**  
ROAS



Awareness

Consideration

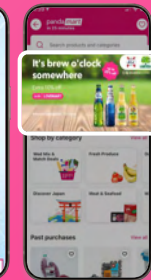
Conversion



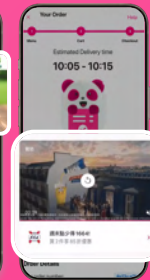
App push



Full-page pop-up



pandamart banners



Order-tracking-page ad



Sub-category boost

# Driving product awareness and orders

## with order-tracking-page ad



- The client** Samsung is one of the world's largest producers of electronic devices. Galaxy S is its flagship smartphone range.
- The goal** Samsung wanted to use panda ads to **increase the number of orders** of its Galaxy S22 series during the product's launch.
- Our approach** We ran an **order-tracking-page ad**. This redirected foodpanda customers to Samsung's official webpage, raising awareness and consideration for potential Samsung customers.

**Campaign objectives**  
Awareness and acquisition

**Target market**  
Malaysia

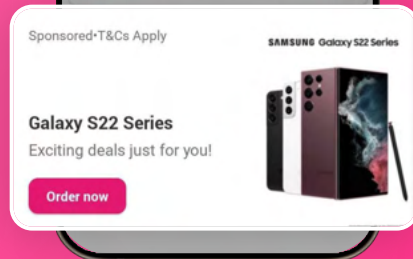
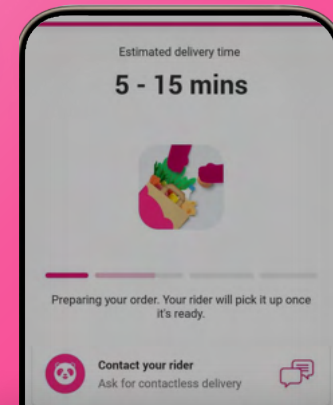


**3.3M**  
unique  
impressions



**1.13%**  
click-through  
rate\*

\* CTR varies depending on the marketing message / incentive / partner etc



Order-tracking-page ads



# Ready to supercharge your next campaign?

## Contact us

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[advertising@foodpanda.com](mailto:advertising@foodpanda.com)

[pandaads.foodpanda.com](https://pandaads.foodpanda.com)

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we deliver  
**ROI**

