



جباتن قرانچن ايكونومي دان ستاتيسٲك

DEPARTMENT OF ECONOMIC PLANNING AND STATISTICS
BRUNEI DARUSSALAM

FOOD AND BEVERAGES SERVICES INDEX

FIRST QUARTER 2026
(2019=100)

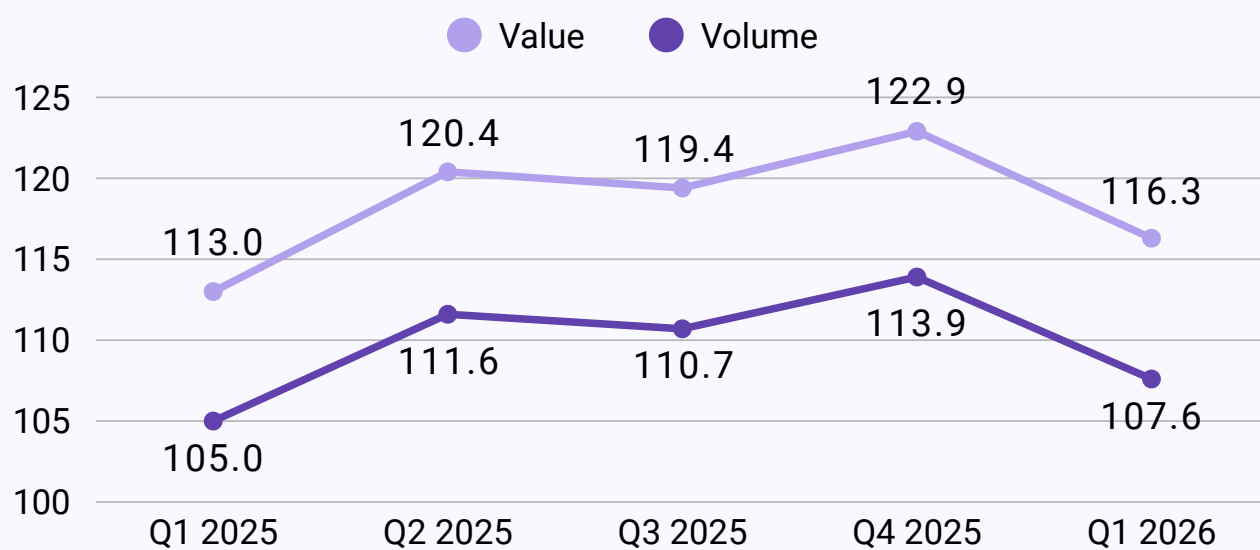


FOOD & BEVERAGES SERVICES INDEX

FIRST QUARTER (Q1) 2026

The Food & Beverages Services Index (F&BSI) measures the movements of food & beverages services activities. It serves as a leading economic indicator of the food & beverages services performance as well as consumer spending behavior.

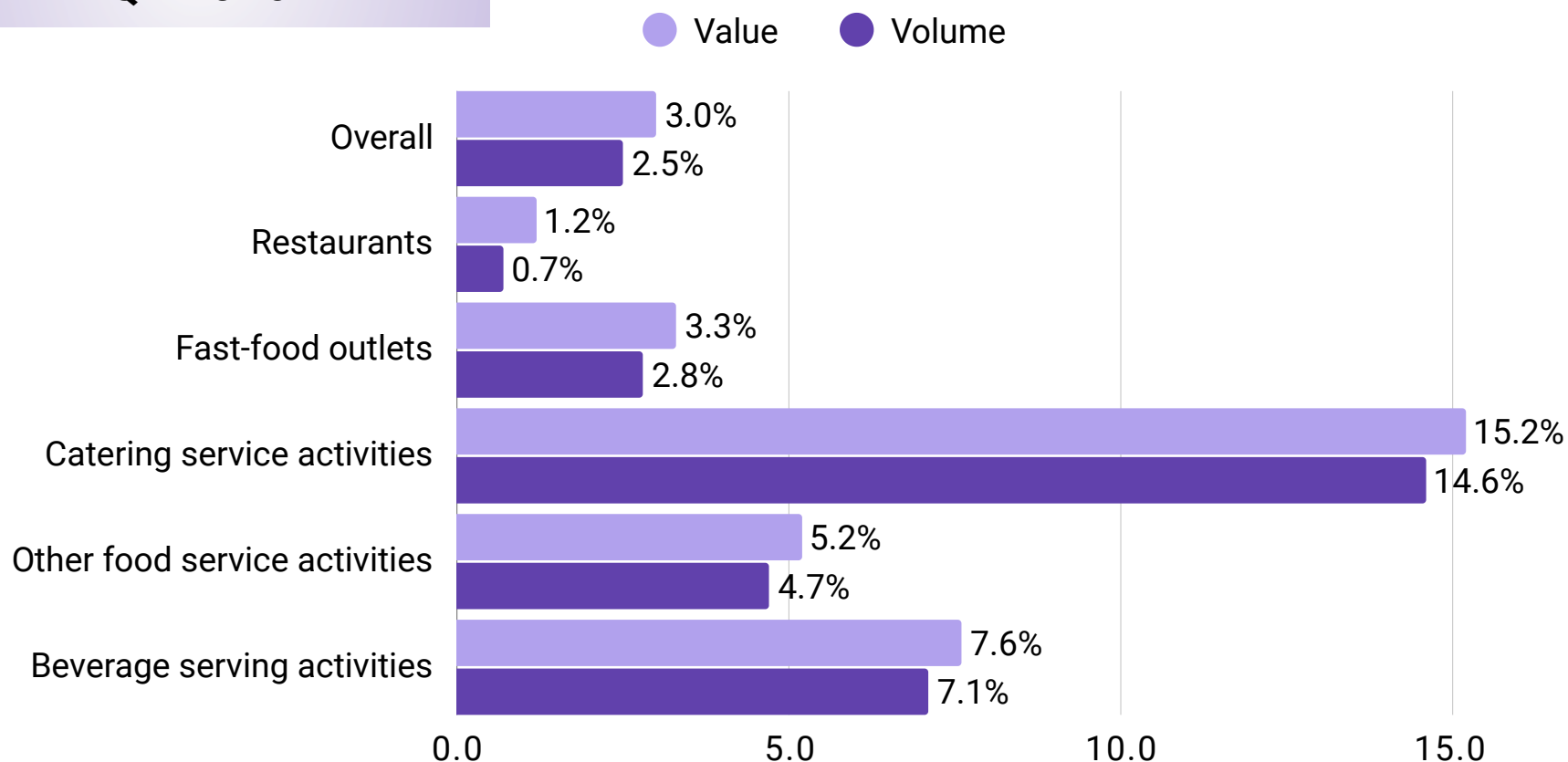
INDEX TREND (Q1 2025 – Q1 2026)



Year-on-Year Change Jan-Mar 2026 | Jan-Mar 2025

VALUE	VOLUME
▲ 3.0%	▲ 2.5%

YEAR-ON-YEAR CHANGE Q1 2026



VALUE OF SALES: BND108.9 MILLION

Highlights Q1 2026

In the first quarter (Q1) 2026, food & beverages services recorded a positive growth of 3.0 per cent year-on-year, after increasing by 0.5 per cent in Q4 2025. The increase was attributed to increases in sales revenue of all food & beverages services activities. On a quarter-on-quarter basis, food & beverages services decreased by 5.3 per cent following an increase of 2.9 per cent in Q4 2025.

The total value of food & beverages services was estimated at BND108.9 million in Q1 2026.

In terms of volume, food & beverages recorded a positive growth of 2.5 per cent year-on-year in Q1 2026, after increasing by 0.2 per cent in Q4 2025. On a quarter-on-quarter basis, food & beverages services recorded a negative growth of 5.5 per cent after increasing by 2.9 per cent in Q4 2025 (**Table 1**).

Table 1: Food & Beverages Services Index (F&BSI), Q1 2026

	Index (2019=100)			Change (%)	
	Q1 2025	Q4 2025	Q1 2026	Q1 2026 / Q1 2025	Q1 2026 / Q4 2025
Sales value	113.0	122.9	116.3	3.0	-5.3
Sales volume	105.0	113.9	107.6	2.5	-5.5

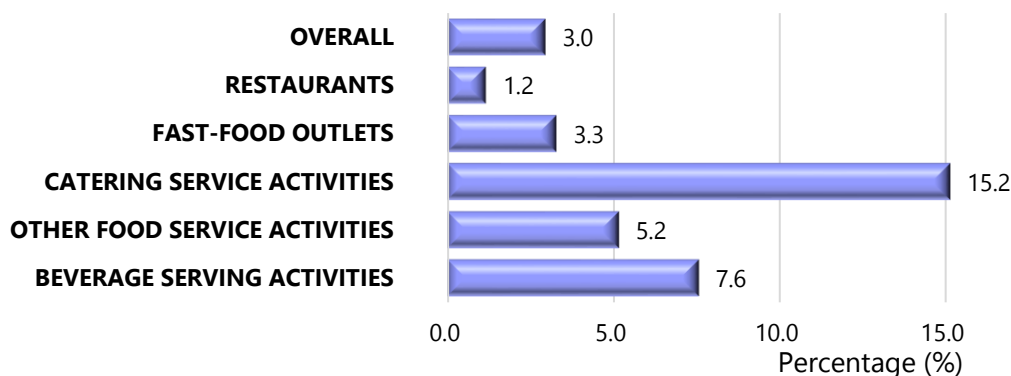
Notes: p = provisional r = revised y-o-y = year on year q-o-q = quarter on quarter

Year-On-Year Change

Sales Value

In terms of value, the sales revenue of food & beverages services has increased by 3.0 per cent in Q1 2026 compared to Q1 2025. The increase was attributed to increases in sales revenue of Catering Service Activities 15.2 per cent; Restaurants 1.2 per cent; Fast-food Outlets 3.3 per cent; Other Food Service Activities 5.2 per cent; and Beverage Serving Activities 7.6 per cent (**Figure 1**).

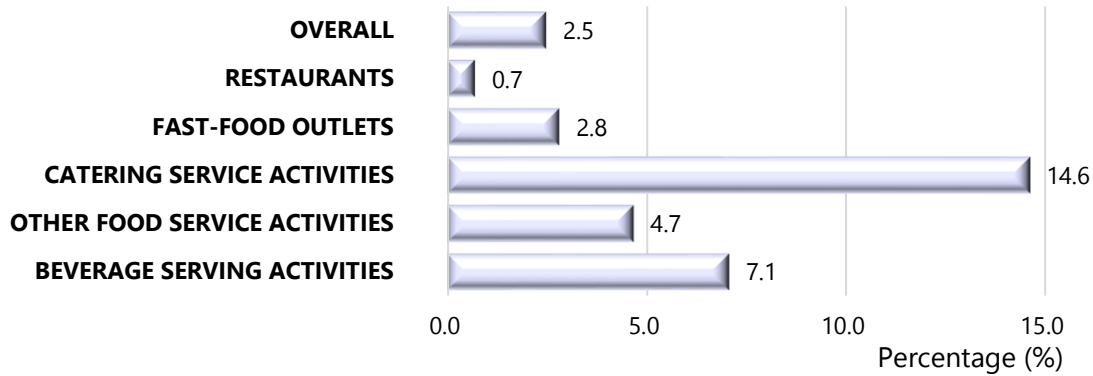
Figure 1: Food & Beverages Services Index Year-on-Year Value Change, Q1 2026



Sales Volume

In terms of volume, food & beverages services sales volume recorded an increase of 2.5 per cent in Q1 2026 compared to Q1 2025. This was attributed to the increase in the sales volume of Catering Service Activities 14.6 per cent; sales volume of Fast-food Outlets 2.8 per cent; sales volume of Other Food Service Activities 4.7 per cent; sales volume of Restaurants 0.7 per cent; and sales volume of Beverage Serving Activities 7.1 per cent; and **(Figure 2)**.

Figure 2: Food & Beverages Services Index Year-on-Year Volume Change, Q1 2026

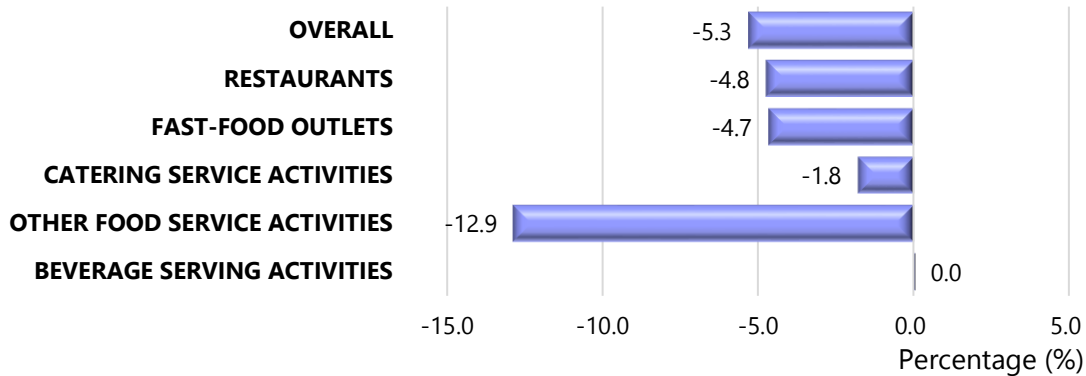


Quarter-On-Quarter Change

Sales Value

In terms of value, compared to Q4 2025, sales revenue of food & beverages services has decreased by 5.3 per cent in Q1 2026 which was due to the decrease in sales revenue of all food & beverages services activities except Beverage Serving Activities **(Figure 3)**.

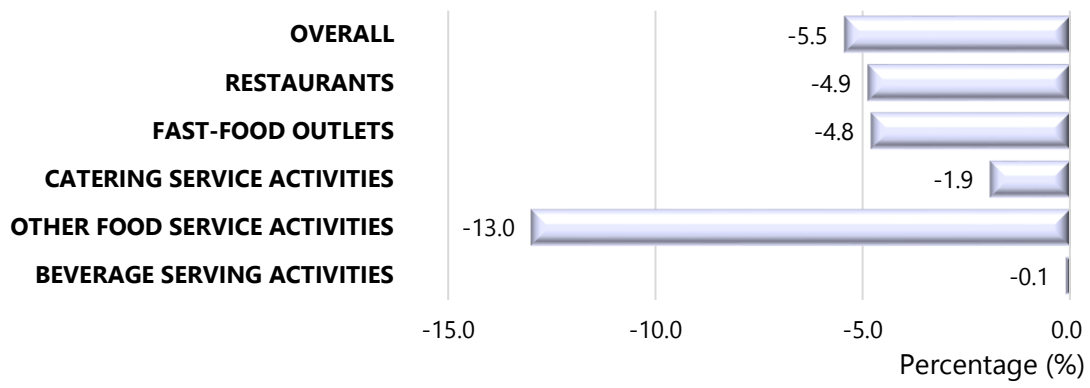
Figure 3: Food & Beverages Services Index Quarter-on-Quarter Value Change, Q1 2026



Sales Volume

In terms of volume, food & beverages services sales volume recorded a decrease of 5.5 per cent in Q1 2026 compared to Q4 2025. This was attributed to the decrease in the sales volume of Restaurants 4.9 per cent; sales volume of Other Food Service Activities 13.0 per cent; sales volume of Fast-food Outlets 4.8 per cent; sales volume of Catering Service Activities 1.9 per cent; and sales volume of Beverage Serving Activities 0.1 per cent **(Figure 4)**.

Figure 4: Food & Beverages Services Index Quarter-on-Quarter Volume Change, Q1 2026



TECHNICAL NOTES

Introduction

Food & beverages services refer to business activities related to food & beverages serving activities providing complete meals or drinks fit for immediate consumption, whether traditional, self-service or take-away restaurants. Food & beverages services is one of the important sectors that contributes to Brunei Darussalam's economy, accounting for nearly 11 per cent of the number of enterprises; employing around 9 per cent of the workforce; and generating almost 2 per cent of the total operating revenue of the private sector in 2019.

The Food & Beverages Services Index (F&BSI) measures the movements of food & beverages services activities. It serves as a leading economic indicator of the food & beverages services performance as well as consumer spending behavior.

Scope and Coverage

The Food & Beverages Services activities are classified in accordance with the Brunei Darussalam Standard Industrial Classification (BDSIC) 2011 under Division 56 – Food and Beverage Services Activities, which is based on the United Nation's International Standard Industrial Classification (ISIC), Revision 4.

Group	Group Description
561	Restaurants and mobile food services activities
562	Event catering and other food services activities
563	Beverage serving activities

Data Sources

F&BSI is compiled using data from the Quarterly Survey of Businesses (QSB) conducted by the Department of Economic Planning and Statistics (JPES) every quarter. A sample of 219 enterprises are covered in the QSB for food & beverage services activities.

The weight for each activity reflects its relative importance in the overall food and beverage services sector. The weights are computed based on the food and beverage services sales of each activity obtained from the Annual Census of Enterprises (ACE) for reference year 2019.

Index Compilation

The overall F&BSI is a weighted average of indices at the detailed activity level. The sales index at the activity level is derived by aggregating the sales value of enterprises belonging to the same activity and dividing it by the average quarterly sales for the same activity in the base year (2019). The overall F&BSI is then computed by summing all the weighted activities indices using the Laspeyres formula.

The indices and percentage changes will be published to one decimal place in the F&BSI reports. However, the computation of percentage changes is based on the unrounded index values.

The indices are reported both in value and volume terms. The indices in value terms measure the changes in sales value which may be due to changes in both price and quantity. The indices in volume terms measure the changes in volume of the food & beverages services activities. These are done by removing the price effect by adjusting the nominal value using price deflators of the reference quarter.

Rebasing of Index

The Food & Beverages Services Index (F&BSI) has been rebased to the year 2019. The weights for the new F&BSI series were derived from the results of the Annual Census of Enterprises (ACE) 2019.

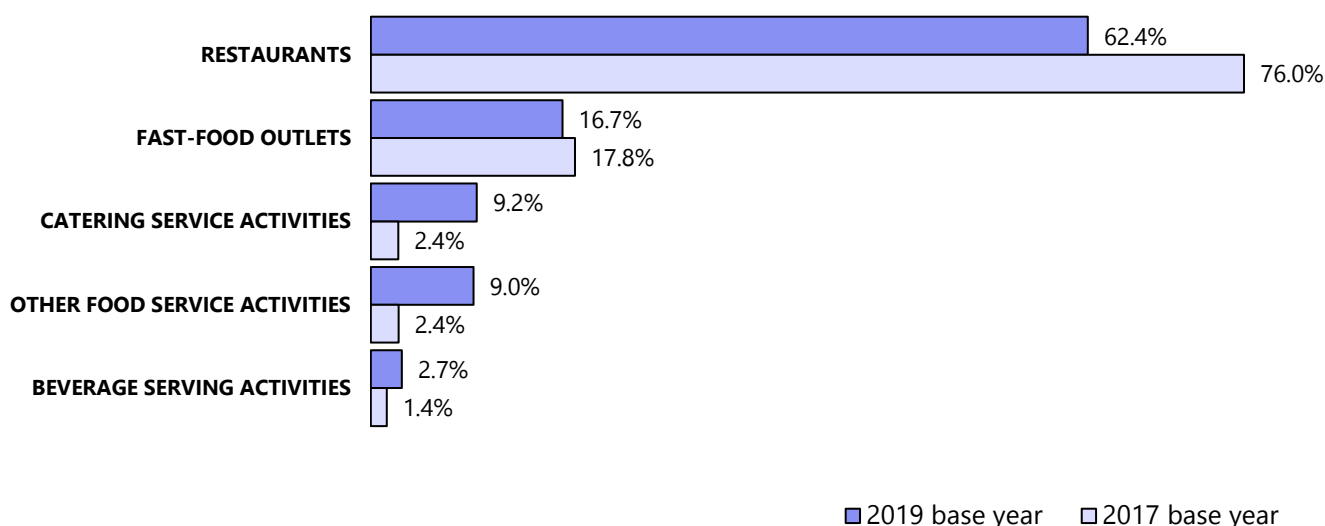
The F&BSI is rebased to reflect changes in the structure of the food & beverages services sector. The methodology, coverage and weights are reviewed and updated during the rebasing exercise. The rebasing of the F&BSI series from base year 2017 to 2019 is the first rebasing exercise since its compilation in 2020.

The current grouping of Other Food Service Activities comprises of classes 5619 – Other eating places, 5621 – Event catering, and 5629 – Other food service activities. After rebasing, classes 5621 and 5629 are regrouped under a revised F&BSI category which is Catering Service Activities. Hence, the F&BSI category of Other Food Service Activities only refers to class 5619.

The revised F&BSI categories take effect from reference quarter Q1 2020.

In comparison between the old and new weights for the food & beverages services activities, the most significant change in weights is that of Restaurants which decreased from 76.0 per cent of total food & beverages services to 62.4 per cent, followed by Catering Service Activities which increased from 2.4 per cent to 9.2 per cent (**Figure 1**).

Figure 1: Comparison of weights between 2019 base year and 2017 base year



Revision Policy

Revisions will only be made to the published figures for the previous periods if there are any changes based on the latest available data.

Annex 1: Quarterly Food & Beverages Services Index (2019 = 100), Value

No.	Description	Weights	2019	Q1 2024	Q2 2024	Q3 2024	Q4 2024	2024	Q1 2025	Q2 2025	Q3 2025	Q4 2025	2025	Q1 2026
1	Restaurants	6,243	100.0	119.0	119.3	122.9	121.8	128.7	113.9	119.9	119.8	121.0	126.5	115.3
2	Fast-food outlets	1,668	100.0	125.0	129.0	126.4	135.1	128.9	127.1	135.4	135.6	137.7	134.0	131.3
3	Catering service activities	923	100.0	82.4	78.3	84.2	88.8	83.4	74.4	84.2	84.6	87.2	82.6	85.7
4	Other food service activities	895	100.0	133.7	132.7	128.3	141.0	133.9	123.8	134.2	128.0	149.5	133.9	130.2
5	Beverage serving activities	271	100.0	110.3	121.6	104.6	106.0	110.6	100.4	114.4	99.9	108.0	105.7	108.0
	Total	10,000	100.0	117.7	118.4	119.9	122.3	124.6	113.0	120.4	119.4	122.9	123.8	116.3

Annex 2: Quarterly Food & Beverages Services Estimated Value of Sales (BND Million)

No.	Description	Weights	2019	Q1 2024	Q2 2024	Q3 2024	Q4 2024	2024	Q1 2025	Q2 2025	Q3 2025	Q4 2025	2025	Q1 2026
1	Restaurants	6,243	233.6	69.5	69.7	71.8	71.2	300.8	66.5	70.1	70.0	70.7	295.6	67.3
2	Fast-food outlets	1,668	62.4	19.5	20.1	19.7	21.1	80.5	19.8	21.1	21.2	21.5	83.6	20.5
3	Catering service activities	923	34.5	7.1	6.8	7.3	7.7	28.8	6.4	7.3	7.3	7.5	28.5	7.4
4	Other food service activities	895	33.5	11.2	11.1	10.7	11.8	44.9	10.4	11.2	10.7	12.5	44.9	10.9
5	Beverage serving activities	271	10.1	2.8	3.1	2.6	2.7	11.2	2.5	2.9	2.5	2.7	10.7	2.7
	Total	10,000	374.3	110.2	110.8	112.2	114.4	466.2	105.7	112.6	111.7	115.0	463.3	108.9

Annex 3: Year-On-Year Growth Rate of Quarterly Food & Beverages Services Index (2019 = 100) (Per cent %), Value

No.	Description	Weights	Q1 2024	Q2 2024	Q3 2024	Q4 2024	2024	Q1 2025	Q2 2025	Q3 2025	Q4 2025	2025	Q1 2026	
			Changes										Changes	Contribution
1	Restaurants	6,243	-2.8	-1.1	-0.6	-1.3	-1.4	-4.3	0.5	-2.5	-0.7	-1.7	1.2	24.8
2	Fast-food outlets	1,668	-3.4	-3.1	-11.2	3.7	-3.7	1.6	5.0	7.3	1.9	3.9	3.3	20.9
3	Catering service activities	923	22.6	14.1	18.4	15.8	17.6	-9.7	7.5	0.4	-1.7	-1.0	15.2	31.1
4	Other food service activities	895	12.4	-2.6	-5.9	4.5	1.8	-7.3	1.2	-0.2	6.0	0.0	5.2	17.1
5	Beverage serving activities	271	7.5	7.7	-9.2	-3.9	0.3	-9.0	-5.9	-4.5	1.9	-4.5	7.6	6.2
	Total	10,000	0.1	-0.6	-2.4	1.1	-0.5	-4.0	1.6	-0.4	0.5	-0.6	3.0	100.0

Annex 4: Quarter-On-Quarter Growth Rate of Quarterly Food & Beverages Services Index (2019 = 100) (Per cent %), Value

No.	Description	Weights	Q1 2024	Q2 2024	Q3 2024	Q4 2024	Q1 2025	Q2 2025	Q3 2025	Q4 2025	Q1 2026	
			Changes									
1	Restaurants	6,243	-3.6	0.2	3.0	-0.9	-6.5	5.3	-0.1	1.0	-4.8	55.0
2	Fast-food outlets	1,668	-4.0	3.2	-2.1	6.9	-5.9	6.6	0.1	1.6	-4.7	16.4
3	Catering service activities	923	7.5	-4.9	7.5	5.4	-16.2	13.2	0.4	3.2	-1.8	2.2
4	Other food service activities	895	-0.9	-0.7	-3.3	9.9	-12.1	8.4	-4.6	16.8	-12.9	26.4
5	Beverage serving activities	271	0.0	10.2	-14.0	1.4	-5.3	13.9	-12.7	8.1	0.0	0.0
	Total	10,000	-2.6	0.6	1.2	2.0	-7.6	6.5	-0.8	2.9	-5.3	100.0

Annex 5: Quarterly Food & Beverages Services Index (2019 = 100), Volume

No.	Description	Weights	2019	Q1 2024	Q2 2024	Q3 2024	Q4 2024	2024	Q1 2025	Q2 2025	Q3 2025	Q4 2025	2025	Q1 2026
1	Restaurants	6,243	100.0	111.1	111.1	114.2	113.2	118.7	105.9	111.2	111.1	112.1	116.2	106.6
2	Fast-food outlets	1,668	100.0	116.7	120.1	117.5	125.6	118.8	118.1	125.6	125.7	127.6	123.1	121.4
3	Catering service activities	923	100.0	76.9	73.0	78.3	82.5	76.9	69.2	78.1	78.4	80.8	75.9	79.3
4	Other food service activities	895	100.0	124.8	123.6	119.3	131.0	123.5	115.1	124.5	118.7	138.5	123.0	120.5
5	Beverage serving activities	271	100.0	103.0	113.2	97.2	98.5	102.0	93.3	106.1	92.6	100.0	97.1	99.9
	Total	10,000	100.0	109.9	110.3	111.5	113.6	114.8	105.0	111.6	110.7	113.9	113.7	107.6

Annex 6: Year-On-Year Growth Rate of Quarterly Food & Beverages Services Index (2019 = 100) (Per cent %), Volume

No.	Description	Weights	Q1 2024	Q2 2024	Q3 2024	Q4 2024	2024	Q1 2025	Q2 2025	Q3 2025	Q4 2025	2025	Q1 2026	
			Changes										Changes	Contribution
1	Restaurants	6,243	-3.4	-1.7	-1.4	-1.9	-2.1	-4.7	0.1	-2.8	-1.0	-2.1	0.7	17.7
2	Fast-food outlets	1,668	-4.1	-3.7	-11.8	3.0	-4.3	1.2	4.5	7.0	1.6	3.6	2.8	21.2
3	Catering service activities	923	21.8	13.5	17.6	15.0	16.9	-10.1	7.1	0.2	-2.0	-1.3	14.6	35.7
4	Other food service activities	895	11.6	-3.2	-6.6	3.9	1.1	-7.8	0.7	-0.5	5.7	-0.4	4.7	18.5
5	Beverage serving activities	271	6.8	7.0	-9.8	-4.5	-0.3	-9.4	-6.3	-4.7	1.6	-4.8	7.1	6.9
	Total	10,000	-0.6	-1.2	-3.1	0.5	-1.2	-4.4	1.2	-0.7	0.2	-1.0	2.5	100.0

Annex 7: Quarter-On-Quarter Growth Rate of Quarterly Food & Beverages Services Index (2019 = 100) (Per cent %), Volume

No.	Description	Weights	Q1 2024	Q2 2024	Q3 2024	Q4 2024	Q1 2025	Q2 2025	Q3 2025	Q4 2025	Q1 2026	
			Changes									Changes
1	Restaurants	6,243	-3.8	0.0	2.8	-0.9	-6.5	5.0	-0.1	0.9	-4.9	55.2
2	Fast-food outlets	1,668	-4.2	2.9	-2.2	6.9	-5.9	6.3	0.1	1.5	-4.8	16.5
3	Catering service activities	923	7.3	-5.2	7.3	5.4	-16.2	12.9	0.4	3.1	-1.9	2.3
4	Other food service activities	895	-1.1	-1.0	-3.5	9.8	-12.1	8.1	-4.6	16.7	-13.0	25.9
5	Beverage serving activities	271	-0.2	9.9	-14.1	1.3	-5.2	13.6	-12.7	8.0	-0.1	0.0
	Total	10,000	-2.9	0.3	1.1	2.0	-7.6	6.3	-0.8	2.9	-5.5	100.0