



Consumer Foodservice in Thailand

April 2026

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Consumer Foodservice in Thailand

EXECUTIVE SUMMARY

Consumers prioritise value, experience-led dining and delivery

KEY DATA FINDINGS

INDUSTRY PERFORMANCE

Value-for-money formats gain ground as Thai consumers navigate budget pressures

Eat-in remains dominant fulfilment mode while delivery gains popularity

Experiential dining becomes increasingly important

WHAT'S NEXT?

Polarisation will persist amid continued expenditure constraints

Localisation will emerge as key focus

Sustainability will remain a secondary consideration

COMPETITIVE LANDSCAPE

CP All PCL leads through 7-Eleven network

Lawson 108 and Mixue record strong performance through affordable high-frequency consumption

Operators focus on format efficiency and engagement-led innovation to drive growth

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Independent outlets maintain lead amid growing pressure from chains

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Premiumisation, health trends and delivery adoption drive growth in cafés/bars

INDUSTRY PERFORMANCE

Premium beverages drive growth as consumers seek affordable indulgences

Juice/smoothie bars benefit from ongoing health and wellness trend

Delivery gains traction as cost-efficient alternative

WHAT'S NEXT?

Premium beverages will support demand but value will remain key consideration

Takeaway will be key growth driver

Functional beverages and locally-inspired Thai flavours will drive momentum

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PTT PCL retains lead through Café Amazon brand

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2025 DEVELOPMENTS

Polarised dining behaviour impacts customer traffic, amid focus on experience-led value

INDUSTRY PERFORMANCE

Subdued performance as consumers limit visits to weekends and special occasions

Asian full-service restaurants lead growth

Eat-in remains primary fulfilment mode for full-service restaurants

WHAT'S NEXT?

Polarisation will intensify with growth in both value and premium full-service dining

Experience-led engagement will be key to sustaining eat-in demand

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2025 DEVELOPMENTS

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INDUSTRY PERFORMANCE

Convenience store-based limited-service restaurants emerge as go-to option

KFC drives growth in chicken limited-service restaurants

Eat-in remains core as delivery gains momentum

WHAT'S NEXT?

Continued growth for limited-service restaurants as consumers prioritise value and convenience

Delivery will be key growth driver

Thai-inspired flavours to boost menu innovation

COMPETITIVE LANDSCAPE

CP All PCL's 7-Eleven chain maintains leadership through scale, accessibility and tiered offerings

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Self-Service Cafeterias in Thailand

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2025 DEVELOPMENTS

Self-service cafeterias gain from affordability focus

INDUSTRY PERFORMANCE

Value and convenience sustain growth

Chains dominate self-service cafeteria landscape

Eat-in remains dominant fulfilment mode

WHAT'S NEXT?

Self-service cafeterias will benefit from ongoing consumer focus on affordability

Delivery and takeaway offer incremental growth potential

Local Thai-oriented menus will be key growth driver

COMPETITIVE LANDSCAPE

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2025 DEVELOPMENTS

Street stalls/kiosks expand on back of affordability and on-the-go consumption

INDUSTRY PERFORMANCE

Street stalls/kiosks benefit from shift towards more affordable and flexible meal options

Independents lead growth, while chains compete through innovation and branding

Delivery and takeaway remain dominant fulfilment modes

WHAT'S NEXT?

Affordability and on-the-go consumption trends will ensure future growth

Online ordering will be key driver

Health and wellness will serve as core differentiator

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2025 DEVELOPMENTS

Retail locations drive growth as shopping centres evolve into multi-purpose lifestyle destinations

INDUSTRY PERFORMANCE

Retail emerges as most dynamic non-standalone location

Operators focus on expansion of standalone foodservice

Delivery is a key growth driver

WHAT'S NEXT?

Retail locations to lead growth

Shifts in fulfilment will support sales through standalone locations

Lodging-based foodservice outlets offer potential as premium and experiential dining destinations

Urbanisation will support demand in high-density locations

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