



# Full-Service Restaurants in Vietnam

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Table of Contents

## Full-Service Restaurants in Vietnam - Category analysis

### KEY DATA FINDINGS

#### 2025 DEVELOPMENTS

Higher spending per visit supports value growth despite economic pressure

#### INDUSTRY PERFORMANCE

Menu price increases and experiential dining sustain value growth

Independent operators drive growth through flexibility and local relevance

Delivery expands as a complementary revenue channel

#### WHAT'S NEXT?

Economic recovery and tourism expansion support future growth

Dine-in remains dominant while delivery continues expanding

Sustainability becomes an increasingly important strategic priority

#### COMPETITIVE LANDSCAPE

Golden Gate maintains leadership through scale, brand portfolio and operational strength

Haidilao differentiates through premium positioning and superior customer experience

Independent operators remain structurally dominant across the category

#### CATEGORY DATA

Table 1 - Full-Service Restaurants by Category: Units/Outlets 2020-2025

Table 2 - Sales in Full-Service Restaurants by Category: Number of Transactions 2020-2025

Table 3 - Sales in Full-Service Restaurants by Category: Foodservice Value 2020-2025

Table 4 - Full-Service Restaurants by Category: % Units/Outlets Growth 2020-2025

Table 5 - Sales in Full-Service Restaurants by Category: % Transaction Growth 2020-2025

Table 6 - Sales in Full-Service Restaurants by Category: % Foodservice Value Growth 2020-2025

Table 7 - GBO Company Shares in Chained Full-Service Restaurants: % Foodservice Value 2021-2025

Table 8 - GBN Brand Shares in Chained Full-Service Restaurants: % Foodservice Value 2022-2025

Table 9 - Forecast Full-Service Restaurants by Category: Units/Outlets 2025-2030

Table 10 - Forecast Sales in Full-Service Restaurants by Category: Number of Transactions 2025-2030

Table 11 - Forecast Sales in Full-Service Restaurants by Category: Foodservice Value 2025-2030

Table 12 - Forecast Full-Service Restaurants by Category: % Units/Outlets Growth 2025-2030

Table 13 - Forecast Sales in Full-Service Restaurants by Category: % Transaction Growth 2025-2030

Table 14 - Forecast Sales in Full-Service Restaurants by Category: % Foodservice Value Growth 2025-2030

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[Consumer Foodservice in Vietnam - Industry Overview](#)

### EXECUTIVE SUMMARY

Consumer foodservice benefits from tourism recovery and strong eating-out culture

### KEY DATA FINDINGS

#### INDUSTRY PERFORMANCE

Inflationary pressure tempers recovery in 2025

Delivery strengthens its role in fulfilment

Experience and loyalty programmes drive differentiation

#### WHAT'S NEXT?

Stable growth supported by tourism and structural demand

Cloud kitchens gain momentum as value and convenience converge

Sustainability emerges as a competitive differentiator

## COMPETITIVE LANDSCAPE

Golden Gate Trade & Services JSC retains leadership through scale and diversification

Katinat Saigon Kafe JSC stands out as the most dynamic player

New entrants intensify competition in specialist beverages

## CHANNELS

Independent operators retain dominance amid competitive pressure

Innovation reshapes operational and customer engagement models

## MARKET DATA

Table 15 - Units, Transactions and Value Sales in Consumer Foodservice 2020-2025

Table 16 - Units, Transactions and Value Sales in Consumer Foodservice: % Growth 2020-2025

Table 17 - Consumer Foodservice by Independent vs Chained by Type: Units/Outlets 2025

Table 18 - Consumer Foodservice by Independent vs Chained: % Foodservice Value 2020-2025

Table 19 - Sales in Consumer Foodservice by Food vs Drink Split: % Foodservice Value 2020-2025

Table 20 - Sales in Consumer Foodservice by Food vs Drink Split by Type: % Foodservice Value 2025

Table 21 - Sales in Consumer Foodservice by Location: % Foodservice Value 2020-2025

Table 22 - Sales in Consumer Foodservice by Fulfillment: % Foodservice Value 2020-2025

Table 23 - GBO Company Shares in Chained Consumer Foodservice: % Foodservice Value 2021-2025

Table 24 - GBN Brand Shares in Chained Consumer Foodservice: % Foodservice Value 2022-2025

Table 25 - GBN Brand Shares in Chained Consumer Foodservice: Units/Outlets 2025

Table 26 - Forecast Units, Transactions and Value Sales in Consumer Foodservice 2025-2030

Table 27 - Forecast Units, Transactions and Value Sales in Consumer Foodservice: % Growth 2025-2030

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## SOURCES

Summary 1 - Research Sources

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