



Consumer Foodservice in Vietnam

March 2026

Table of Contents

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

Table 2 - Units, Transactions and Value Sales in Consumer Foodservice: % Growth 2020-2025

Table 3 - Consumer Foodservice by Independent vs Chained by Type: Units/Outlets 2025

Table 4 - Consumer Foodservice by Independent vs Chained: % Foodservice Value 2020-2025

Table 5 - Sales in Consumer Foodservice by Food vs Drink Split: % Foodservice Value 2020-2025

Table 6 - Sales in Consumer Foodservice by Food vs Drink Split by Type: % Foodservice Value 2025

Table 7 - Sales in Consumer Foodservice by Location: % Foodservice Value 2020-2025

Table 8 - Sales in Consumer Foodservice by Fulfillment: % Foodservice Value 2020-2025

Table 9 - GBO Company Shares in Chained Consumer Foodservice: % Foodservice Value 2021-2025

Table 10 - GBN Brand Shares in Chained Consumer Foodservice: % Foodservice Value 2022-2025

Table 11 - GBN Brand Shares in Chained Consumer Foodservice: Units/Outlets 2025

Table 12 - Forecast Units, Transactions and Value Sales in Consumer Foodservice 2025-2030

Table 13 - Forecast Units, Transactions and Value Sales in Consumer Foodservice: % Growth 2025-2030

DISCLAIMER

SOURCES

Summary 1 - Research Sources

Cafés/Bars in Vietnam

KEY DATA FINDINGS

2025 DEVELOPMENTS

Strong café culture and lifestyle shifts sustain robust category growth

INDUSTRY PERFORMANCE

Strong social and cultural relevance underpins value growth

Chained specialist coffee and tea shops lead dynamic expansion
Delivery plays an increasingly strategic role in beverage consumption

WHAT'S NEXT?

Stable consumption habits and investment support future growth
Delivery continues to expand as a key fulfilment channel
Sustainability gains importance among leading operators

COMPETITIVE LANDSCAPE

SuperFoods Group leverages brand strength and national scale
Katinat Saigon Kafe accelerates growth through lifestyle positioning
Independent operators remain structurally dominant

CATEGORY DATA

Table 14 - Cafés/Bars by Category: Units/Outlets 2020-2025
Table 15 - Sales in Cafés/Bars by Category: Number of Transactions 2020-2025
Table 16 - Sales in Cafés/Bars by Category: Foodservice Value 2020-2025
Table 17 - Cafés/Bars by Category: % Units/Outlets Growth 2020-2025
Table 18 - Sales in Cafés/Bars by Category: % Transaction Growth 2020-2025
Table 19 - Sales in Cafés/Bars by Category: % Foodservice Value Growth 2020-2025
Table 20 - GBO Company Shares in Chained Cafés/Bars: % Foodservice Value 2021-2025
Table 21 - GBN Brand Shares in Chained Cafés/Bars: % Foodservice Value 2022-2025
Table 22 - Forecast Cafés/Bars by Category: Units/Outlets 2025-2030
Table 23 - Forecast Sales in Cafés/Bars by Category: Number of Transactions 2025-2030
Table 24 - Forecast Sales in Cafés/Bars by Category: Foodservice Value 2025-2030
Table 25 - Forecast Cafés/Bars by Category: % Units/Outlets Growth 2025-2030
Table 26 - Forecast Sales in Cafés/Bars by Category: % Transaction Growth 2025-2030
Table 27 - Forecast Sales in Cafés/Bars by Category: % Foodservice Value Growth 2025-2030

DISCLAIMER

[Full-Service Restaurants in Vietnam](#)

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

Table 29 - Sales in Full-Service Restaurants by Category: Number of Transactions 2020-2025
Table 30 - Sales in Full-Service Restaurants by Category: Foodservice Value 2020-2025
Table 31 - Full-Service Restaurants by Category: % Units/Outlets Growth 2020-2025
Table 32 - Sales in Full-Service Restaurants by Category: % Transaction Growth 2020-2025
Table 33 - Sales in Full-Service Restaurants by Category: % Foodservice Value Growth 2020-2025
Table 34 - GBO Company Shares in Chained Full-Service Restaurants: % Foodservice Value 2021-2025
Table 35 - GBN Brand Shares in Chained Full-Service Restaurants: % Foodservice Value 2022-2025
Table 36 - Forecast Full-Service Restaurants by Category: Units/Outlets 2025-2030
Table 37 - Forecast Sales in Full-Service Restaurants by Category: Number of Transactions 2025-2030
Table 38 - Forecast Sales in Full-Service Restaurants by Category: Foodservice Value 2025-2030
Table 39 - Forecast Full-Service Restaurants by Category: % Units/Outlets Growth 2025-2030
Table 40 - Forecast Sales in Full-Service Restaurants by Category: % Transaction Growth 2025-2030
Table 41 - Forecast Sales in Full-Service Restaurants by Category: % Foodservice Value Growth 2025-2030

DISCLAIMER

Limited-Service Restaurants in Vietnam

KEY DATA FINDINGS

2025 DEVELOPMENTS

Convenience and chicken-focused menus support steady category growth

INDUSTRY PERFORMANCE

Popular chicken formats and network expansion sustain value growth

Convenience stores drive dynamic growth within the category

Delivery strengthens its contribution to limited-service restaurant sales

WHAT'S NEXT?

Stable demand and expansion into smaller cities support forecast growth

Delivery will remain central to fulfilment strategies

Menu innovation will remain essential for long-term competitiveness

COMPETITIVE LANDSCAPE

Jollibee Vietnam strengthens leadership through expansion and branding

Mesa Asia Pacific Trading Services drives growth through menu innovation

Chained operators dominate through scale and franchising

CATEGORY DATA

Table 42 - Limited-Service Restaurants by Category: Units/Outlets 2020-2025
Table 43 - Sales in Limited-Service Restaurants by Category: Number of Transactions 2020-2025
Table 44 - Sales in Limited-Service Restaurants by Category: Foodservice Value 2020-2025
Table 45 - Limited-Service Restaurants by Category: % Units/Outlets Growth 2020-2025
Table 46 - Sales in Limited-Service Restaurants by Category: % Transaction Growth 2020-2025
Table 47 - Sales in Limited-Service Restaurants by Category: % Foodservice Value Growth 2020-2025
Table 48 - GBO Company Shares in Chained Limited-Service Restaurants: % Foodservice Value 2021-2025
Table 49 - GBN Brand Shares in Chained Limited-Service Restaurants: % Foodservice Value 2022-2025
Table 50 - Forecast Limited-Service Restaurants by Category: Units/Outlets 2025-2030
Table 51 - Forecast Sales in Limited-Service Restaurants by Category: Number of Transactions 2025-2030
Table 52 - Forecast Sales in Limited-Service Restaurants by Category: Foodservice Value 2025-2030
Table 53 - Forecast Limited-Service Restaurants by Category: % Units/Outlets Growth 2025-2030
Table 54 - Forecast Sales in Limited-Service Restaurants by Category: % Transaction Growth 2025-2030
Table 55 - Forecast Sales in Limited-Service Restaurants by Category: % Foodservice Value Growth 2025-2030

DISCLAIMER

Street Stalls/Kiosks in Vietnam

KEY DATA FINDINGS

2025 DEVELOPMENTS

Affordable and convenient formats support steady value growth

INDUSTRY PERFORMANCE

Widespread availability and affordability underpin category resilience

Franchising accelerates expansion of chained street stalls/kiosks

Take-away and delivery remain structurally dominant fulfilment channels

WHAT'S NEXT?

Cultural importance and affordability ensure continued long-term relevance

Delivery and takeaway continue expanding alongside digitalisation

Regulatory tightening accelerates formalisation and structural transformation

COMPETITIVE LANDSCAPE

Snow King Global strengthens leadership through aggressive expansion and value positioning

KOI Thé expands strategically while maintaining premium brand positioning

Independent operators remain dominant but face increasing structural pressure

CATEGORY DATA

Table 56 - Street Stalls/Kiosks: Units/Outlets 2020-2025

Table 57 - Sales in Street Stalls/Kiosks: Number of Transactions 2020-2025

Table 58 - Sales in Street Stalls/Kiosks: Foodservice Value 2020-2025

Table 59 - Street Stalls/Kiosks: % Units/Outlets Growth 2020-2025

Table 60 - Sales in Street Stalls/Kiosks: % Transaction Growth 2020-2025

Table 61 - Sales in Street Stalls/Kiosks: % Foodservice Value Growth 2020-2025

Table 62 - GBO Company Shares in Chained Street Stalls/Kiosks: % Foodservice Value 2021-2025

Table 63 - GBN Brand Shares in Chained Street Stalls/Kiosks: % Foodservice Value 2022-2025

Table 64 - Forecast Street Stalls/Kiosks: Units/Outlets 2025-2030

Table 65 - Forecast Sales in Street Stalls/Kiosks: Number of Transactions 2025-2030

Table 66 - Forecast Sales in Street Stalls/Kiosks: Foodservice Value 2025-2030

Table 67 - Forecast Street Stalls/Kiosks: % Units/Outlets Growth 2025-2030

Table 68 - Forecast Sales in Street Stalls/Kiosks: % Transaction Growth 2025-2030

Table 69 - Forecast Sales in Street Stalls/Kiosks: % Foodservice Value Growth 2025-2030

DISCLAIMER

Consumer Foodservice By Location in Vietnam

KEY DATA FINDINGS

2025 DEVELOPMENTS

Travel and retail locations gain momentum amid tourism recovery and urbanisation

INDUSTRY PERFORMANCE

Tourism recovery boosts travel location performance

Standalone outlets maintain structural dominance despite gradual share decline

Delivery expansion reinforces advantages of accessible standalone and retail locations

WHAT'S NEXT?

Leisure locations present significant long-term growth opportunities
Standalone outlets remain dominant despite structural shifts
Tourism presents both major opportunities and structural risks
Demographic shifts and infrastructure development reshape location strategies

COMPETITIVE LANDSCAPE

Haidilao benefits from strategic positioning in retail locations
Golden Gate strengthens leadership through extensive standalone network

CATEGORY DATA

Table 70 - Consumer Foodservice by Location: Units/Outlets 2020-2025
Table 71 - Sales in Consumer Foodservice by Location: Number of Transactions 2020-2025
Table 72 - Sales in Consumer Foodservice by Location: Foodservice Value 2020-2025
Table 73 - Consumer Foodservice by Location: % Units/Outlets Growth 2020-2025
Table 74 - Sales in Consumer Foodservice by Location: % Transaction Growth 2020-2025
Table 75 - Sales in Consumer Foodservice by Location: % Foodservice Value Growth 2020-2025
Table 76 - Consumer Foodservice Through Standalone: Units/Outlets 2020-2025
Table 77 - Sales in Consumer Foodservice Through Standalone: Number of Transactions 2020-2025
Table 78 - Sales in Consumer Foodservice Through Standalone: Foodservice Value 2020-2025
Table 79 - Consumer Foodservice Through Standalone: % Units/Outlets Growth 2020-2025
Table 80 - Sales in Consumer Foodservice Through Standalone: % Transaction Growth 2020-2025
Table 81 - Sales in Consumer Foodservice Through Standalone: % Foodservice Value Growth 2020-2025
Table 82 - Consumer Foodservice Through Leisure: Units/Outlets 2020-2025
Table 83 - Sales in Consumer Foodservice Through Leisure: Number of Transactions 2020-2025
Table 84 - Sales in Consumer Foodservice Through Leisure: Foodservice Value 2020-2025
Table 85 - Consumer Foodservice Through Leisure: % Units/Outlets Growth 2020-2025
Table 86 - Sales in Consumer Foodservice Through Leisure: % Transaction Growth 2020-2025
Table 87 - Sales in Consumer Foodservice Through Leisure: % Foodservice Value Growth 2020-2025
Table 88 - Consumer Foodservice Through Retail: Units/Outlets 2020-2025
Table 89 - Sales in Consumer Foodservice Through Retail: Number of Transactions 2020-2025
Table 90 - Sales in Consumer Foodservice Through Retail: Foodservice Value 2020-2025
Table 91 - Consumer Foodservice Through Retail: % Units/Outlets Growth 2020-2025
Table 92 - Sales in Consumer Foodservice Through Retail: % Transaction Growth 2020-2025
Table 93 - Sales in Consumer Foodservice Through Retail: % Foodservice Value Growth 2020-2025
Table 94 - Consumer Foodservice Through Lodging: Units/Outlets 2020-2025
Table 95 - Sales in Consumer Foodservice Through Lodging: Number of Transactions 2020-2025
Table 96 - Sales in Consumer Foodservice Through Lodging: Foodservice Value 2020-2025
Table 97 - Consumer Foodservice Through Lodging: % Units/Outlets Growth 2020-2025
Table 98 - Sales in Consumer Foodservice Through Lodging: % Transaction Growth 2020-2025
Table 99 - Sales in Consumer Foodservice Through Lodging: % Foodservice Value Growth 2020-2025
Table 100 - Consumer Foodservice Through Travel: Units/Outlets 2020-2025
Table 101 - Sales in Consumer Foodservice Through Travel: Number of Transactions 2020-2025
Table 102 - Sales in Consumer Foodservice Through Travel: Foodservice Value 2020-2025
Table 103 - Consumer Foodservice Through Travel: % Units/Outlets Growth 2020-2025
Table 104 - Sales in Consumer Foodservice Through Travel: % Transaction Growth 2020-2025
Table 105 - Sales in Consumer Foodservice Through Travel: % Foodservice Value Growth 2020-2025
Table 106 - Forecast Consumer Foodservice by Location: Units/Outlets 2025-2030
Table 107 - Forecast Sales in Consumer Foodservice by Location: Number of Transactions 2025-2030
Table 108 - Forecast Sales in Consumer Foodservice by Location: Foodservice Value 2025-2030
Table 109 - Forecast Consumer Foodservice by Location: % Units/Outlets Growth 2025-2030
Table 110 - Forecast Sales in Consumer Foodservice by Location: % Transaction Growth 2025-2030
Table 111 - Forecast Sales in Consumer Foodservice by Location: % Foodservice Value Growth 2025-2030
Table 112 - Forecast Consumer Foodservice Through Standalone: Units/Outlets 2025-2030

Table 113 - Forecast Sales in Consumer Foodservice Through Standalone: Number of Transactions 2025-2030
Table 114 - Forecast Sales in Consumer Foodservice Through Standalone: Foodservice Value 2025-2030
Table 115 - Forecast Consumer Foodservice Through Standalone: % Units/Outlets Growth 2025-2030
Table 116 - Forecast Sales in Consumer Foodservice Through Standalone: % Transaction Growth 2025-2030
Table 117 - Forecast Sales in Consumer Foodservice Through Standalone: % Foodservice Value Growth 2025-2030
Table 118 - Forecast Consumer Foodservice Through Leisure: Units/Outlets 2025-2030
Table 119 - Forecast Sales in Consumer Foodservice Through Leisure: Number of Transactions 2025-2030
Table 120 - Forecast Sales in Consumer Foodservice Through Leisure: Foodservice Value 2025-2030
Table 121 - Forecast Consumer Foodservice Through Leisure: % Units/Outlets Growth 2025-2030
Table 122 - Forecast Sales in Consumer Foodservice Through Leisure: % Transaction Growth 2025-2030
Table 123 - Forecast Sales in Consumer Foodservice Through Leisure: % Foodservice Value Growth 2025-2030
Table 124 - Forecast Consumer Foodservice Through Retail: Units/Outlets 2025-2030
Table 125 - Forecast Sales in Consumer Foodservice Through Retail: Number of Transactions 2025-2030
Table 126 - Forecast Sales in Consumer Foodservice Through Retail: Foodservice Value 2025-2030
Table 127 - Forecast Consumer Foodservice Through Retail: % Units/Outlets Growth 2025-2030
Table 128 - Forecast Sales in Consumer Foodservice Through Retail: % Transaction Growth 2025-2030
Table 129 - Forecast Sales in Consumer Foodservice Through Retail: % Foodservice Value Growth 2025-2030
Table 130 - Forecast Consumer Foodservice Through Lodging: Units/Outlets 2025-2030
Table 131 - Forecast Sales in Consumer Foodservice Through Lodging: Number of Transactions 2025-2030
Table 132 - Forecast Sales in Consumer Foodservice Through Lodging: Foodservice Value 2025-2030
Table 133 - Forecast Consumer Foodservice Through Lodging: % Units/Outlets Growth 2025-2030
Table 134 - Forecast Sales in Consumer Foodservice Through Lodging: % Transaction Growth 2025-2030
Table 135 - Forecast Sales in Consumer Foodservice Through Lodging: % Foodservice Value Growth 2025-2030
Table 136 - Forecast Consumer Foodservice Through Travel: Units/Outlets 2025-2030
Table 137 - Forecast Sales in Consumer Foodservice Through Travel: Number of Transactions 2025-2030
Table 138 - Forecast Sales in Consumer Foodservice Through Travel: Foodservice Value 2025-2030
Table 139 - Forecast Consumer Foodservice Through Travel: % Units/Outlets Growth 2025-2030
Table 140 - Forecast Sales in Consumer Foodservice Through Travel: % Transaction Growth 2025-2030
Table 141 - Forecast Sales in Consumer Foodservice Through Travel: % Foodservice Value Growth 2025-2030

DISCLAIMER

About Euromonitor International

Euromonitor International is an independent market intelligence provider. Data, insight and analysis stem from in-the-field research spanning 210 national markets.

Content ranges from the in-depth and country-specific, to key strategic themes with a global range and significance. Products cover a comprehensive range of insights and market data, but can be broadly categorised as:

- **Strategy Briefings:** Global or regional in scope, and focussing on the most important themes shaping consumer demand, the key markets, competitive environment and future outlook across a range of industries.
- **Company Profiles:** Analysis dedicated to the world's most significant companies, with detailed insight into their activities, focus of operations, their competitors, their geographic presence and performance.
- **Country Reports:** For an in-depth understanding of specific countries, whether by industry, economic metrics or consumer trends and lifestyles. These reports cover current trends, consumer demand, market potential and future prospects, with country-specific local insight and comprehensive data, unavailable elsewhere.

For more information on this report, further enquiries can be directed via this link www.euromonitor.com/consumer-foodservice-in-vietnam/report.