



Euromonitor
International

Limited-Service Restaurants in Vietnam

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Limited-Service Restaurants in Vietnam - Category analysis

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

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EXECUTIVE SUMMARY

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

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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

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Innovation reshapes operational and customer engagement models

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