



Euromonitor
International

Full-Service Restaurants in Thailand

April 2026

Table of Contents

KEY DATA FINDINGS

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

COMPETITIVE LANDSCAPE

Leader MK Restaurant Group PCL faces growing competitive pressure

Iberry Group drives growth through ThongSmith expansion

Affordable independents dominate sales while upscale chains capture special occasions

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

DISCLAIMER

Consumer Foodservice in Thailand - Industry Overview

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

CHANNELS

Independent outlets maintain lead amid growing pressure from chains

Innovation remains key differentiator

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

DISCLAIMER

SOURCES

Summary 1 - Research Sources

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/full-service-restaurants-in-thailand/report.