



# Consumer Foodservice in Vietnam

March 2026

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### 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

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Independent operators retain dominance amid competitive pressure

Innovation reshapes operational and customer engagement models

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### KEY DATA FINDINGS

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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

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#### 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

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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

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Chained operators dominate through scale and franchising

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### 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

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### Consumer Foodservice By Location in Vietnam

#### KEY DATA FINDINGS

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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

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