



Euromonitor
International

Full-Service Restaurants in Vietnam

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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

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Consumer Foodservice in Vietnam - Industry Overview

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

Katinat Saigon Kafe JSC stands out as the most dynamic player

New entrants intensify competition in specialist beverages

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Innovation reshapes operational and customer engagement models

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