



Euromonitor
International

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

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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

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2025 DEVELOPMENTS

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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
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Sustainability becomes an increasingly important strategic priority

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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?

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Menu innovation will remain essential for long-term competitiveness

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KEY DATA FINDINGS

2025 DEVELOPMENTS

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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

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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
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