



# Limited-Service Restaurants in Vietnam

March 2026

[Table of Contents](#)

## 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

### CATEGORY DATA

Table 1 - Limited-Service Restaurants by Category: Units/Outlets 2020-2025

Table 2 - Sales in Limited-Service Restaurants by Category: Number of Transactions 2020-2025

Table 3 - Sales in Limited-Service Restaurants by Category: Foodservice Value 2020-2025

Table 4 - Limited-Service Restaurants by Category: % Units/Outlets Growth 2020-2025

Table 5 - Sales in Limited-Service Restaurants by Category: % Transaction Growth 2020-2025

Table 6 - Sales in Limited-Service Restaurants by Category: % Foodservice Value Growth 2020-2025

Table 7 - GBO Company Shares in Chained Limited-Service Restaurants: % Foodservice Value 2021-2025

Table 8 - GBN Brand Shares in Chained Limited-Service Restaurants: % Foodservice Value 2022-2025

Table 9 - Forecast Limited-Service Restaurants by Category: Units/Outlets 2025-2030

Table 10 - Forecast Sales in Limited-Service Restaurants by Category: Number of Transactions 2025-2030

Table 11 - Forecast Sales in Limited-Service Restaurants by Category: Foodservice Value 2025-2030

Table 12 - Forecast Limited-Service Restaurants by Category: % Units/Outlets Growth 2025-2030

Table 13 - Forecast Sales in Limited-Service Restaurants by Category: % Transaction Growth 2025-2030

Table 14 - Forecast Sales in Limited-Service Restaurants by Category: % Foodservice Value Growth 2025-2030

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## Consumer Foodservice in Vietnam - Industry Overview

### 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

## CHANNELS

Independent operators retain dominance amid competitive pressure

Innovation reshapes operational and customer engagement models

## 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

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## SOURCES

Summary 1 - Research Sources

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