



Full-Service Restaurants in Thailand

April 2026

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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

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Consumer Foodservice in Thailand - Industry Overview

EXECUTIVE SUMMARY

Consumers prioritise value, experience-led dining and delivery

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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

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