Euromonitor International

Consumer Foodservice in Thailand

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Consumer Foodservice in Thailand

EXECUTIVE SUMMARY

Consumers prioritise value, experience-led dining and delivery

KEY DATA FINDINGS

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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Independent outlets maintain lead amid growing pressure from chains
Innovation remains key differentiator

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2025 DEVELOPMENETS

Premiumisation, health trends and delivery adoption drive growth in cafés/bars

INDUSTRY PERFORMANCE

Premium beverages drive growth as consumers seek affordable indulgences

Juice/smoothie bars benefit from ongoing health and wellness trend
Delivery gains traction as cost-efficient alternative

WHAT'S NEXT?

Premium beverages will support demand but value will remain key consideration
Takeaway will be key growth driver
Functional beverages and locally-inspired Thai flavours will drive momentum

COMPETITIVE LANDSCAPE

PTT PCL retains lead through Café Amazon brand
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Full-Service Restaurants in Thailand

KEY DATA FINDINGS

2025 DEVELOPMENETS

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
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2025 DEVELOPMENTS

Limited-service restaurants see resilient demand as consumers prioritise value and convenience

INDUSTRY PERFORMANCE

Convenience store-based limited-service restaurants emerge as go-to option
KFC drives growth in chicken limited-service restaurants
Eat-in remains core as delivery gains momentum

WHAT'S NEXT?

Continued growth for limited-service restaurants as consumers prioritise value and convenience
Delivery will be key growth driver
Thai-inspired flavours to boost menu innovation

COMPETITIVE LANDSCAPE

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Chained operators maintain dominance

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Self-Service Cafeterias in Thailand

KEY DATA FINDINGS

2025 DEVELOPMENETS

Self-service cafeterias gain from affordability focus

INDUSTRY PERFORMANCE

Value and convenience sustain growth
Chains dominate self-service cafeteria landscape
Eat-in remains dominant fulfilment mode

WHAT'S NEXT?

Self-service cafeterias will benefit from ongoing consumer focus on affordability
Delivery and takeaway offer incremental growth potential
Local Thai-oriented menus will be key growth driver

COMPETITIVE LANDSCAPE

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CATEGORY DATA

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KEY DATA FINDINGS

2025 DEVELOPMENETS

Street stalls/kiosks expand on back of affordability and on-the-go consumption

INDUSTRY PERFORMANCE

Street stalls/kiosks benefit from shift towards more affordable and flexible meal options
Independents lead growth, while chains compete through innovation and branding
Delivery and takeaway remain dominant fulfilment modes

WHAT'S NEXT?

Affordability and on-the-go consumption trends will ensure future growth
Online ordering will be key driver
Health and wellness will serve as core differentiator

COMPETITIVE LANDSCAPE

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Consumer Foodservice By Location in Thailand

KEY DATA FINDINGS

2025 DEVELOPMENETS

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INDUSTRY PERFORMANCE

Retail emerges as most dynamic non-standalone location
Operators focus on expansion of standalone foodservice
Delivery is a key growth driver

WHAT'S NEXT?

Retail locations to lead growth
Shifts in fulfilment will support sales through standalone locations
Lodging-based foodservice outlets offer potential as premium and experiential dining destinations
Urbanisation will support demand in high-density locations

CATEGORY DATA

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