



Consumer Foodservice in Vietnam

February 2023

Table of Contents

Consumer Foodservice in Vietnam

EXECUTIVE SUMMARY

Consumer foodservice in 2022: The big picture

2022 key trends

Competitive landscape

Independent foodservice developments

What next for consumer foodservice?

MARKET DATA

Table 1 - Units, Transactions and Value Sales in Consumer Foodservice 2017-2022

Table 2 - Units, Transactions and Value Sales in Consumer Foodservice: % Growth 2017-2022

Table 3 - Consumer Foodservice by Independent vs Chained by Type: Units/Outlets 2022

Table 4 - Consumer Foodservice by Independent vs Chained: % Foodservice Value 2017-2022

Table 5 - Sales in Consumer Foodservice by Eat-In vs Delivery and To-Go: % Foodservice Value 2017-2022

Table 6 - Sales in Consumer Foodservice by Food vs Drink Split: % Foodservice Value 2017-2022

Table 7 - Sales in Consumer Foodservice by Food vs Drink Split by Type: % Foodservice Value 2022

Table 8 - Sales in Consumer Foodservice by Online/Offline Ordering: % Foodservice Value 2017-2022

Table 9 - Sales in Consumer Foodservice by Location: % Foodservice Value 2017-2022

Table 10 - GBO Company Shares in Chained Consumer Foodservice: % Foodservice Value 2018-2022

Table 11 - GBN Brand Shares in Chained Consumer Foodservice: % Foodservice Value 2019-2022

Table 12 - GBN Brand Shares in Chained Consumer Foodservice: Units/Outlets 2022

Table 13 - Forecast Units, Transactions and Value Sales in Consumer Foodservice 2022-2027

Table 14 - Forecast Units, Transactions and Value Sales in Consumer Foodservice: % Growth 2022-2027

DISCLAIMER

SOURCES

Summary 1 - Research Sources

Cafés/Bars in Vietnam

KEY DATA FINDINGS

2022 DEVELOPMENTS

Independent bars/clubs rebound thanks to return of discerning, higher-income consumers

Overall recovery in cafés/bars thanks to lifting of pandemic restrictions

Speciality coffee and tea shops benefit from lessons learned to enhance ongoing growth

PROSPECTS AND OPPORTUNITIES

Speciality coffee and tea shops set to maintain their popularity, thanks to strong coffee and bubble tea cultures

Online ordering become more crucial for this category

Increasing prices for food will create challenges ahead

CATEGORY DATA

Table 15 - Cafés/Bars by Category: Units/Outlets 2017-2022

Table 16 - Sales in Cafés/Bars by Category: Number of Transactions 2017-2022

Table 17 - Sales in Cafés/Bars by Category: Foodservice Value 2017-2022

Table 18 - Cafés/Bars by Category: % Units/Outlets Growth 2017-2022

Table 19 - Sales in Cafés/Bars by Category: % Transaction Growth 2017-2022

Table 20 - Sales in Cafés/Bars by Category: % Foodservice Value Growth 2017-2022

Table 21 - GBO Company Shares in Chained Cafés/Bars: % Foodservice Value 2018-2022

Table 22 - GBN Brand Shares in Chained Cafés/Bars: % Foodservice Value 2019-2022

Table 23 - Forecast Cafés/Bars by Category: Units/Outlets 2022-2027

- Table 24 - Forecast Sales in Cafés/Bars by Category: Number of Transactions 2022-2027
- Table 25 - Forecast Sales in Cafés/Bars by Category: Foodservice Value 2022-2027
- Table 26 - Forecast Cafés/Bars by Category: % Units/Outlets Growth 2022-2027
- Table 27 - Forecast Sales in Cafés/Bars by Category: % Transaction Growth 2022-2027
- Table 28 - Forecast Sales in Cafés/Bars by Category: % Foodservice Value Growth 2022-2027

Full-Service Restaurants in Vietnam

KEY DATA FINDINGS

2022 DEVELOPMENTS

- Inflationary pressures create challenges for full-service restaurants
- Asian cuisine maintains its popularity in the category

PROSPECTS AND OPPORTUNITIES

- Golden Gate maintains its top place, despite holding miniscule shares due to the majority being held by unbranded “others”
- Full-service restaurants see both challenges and opportunities ahead
- Chained full-service restaurants set to leverage their strengths to expand

CATEGORY DATA

- Table 29 - Full-Service Restaurants by Category: Units/Outlets 2017-2022
- Table 30 - Sales in Full-Service Restaurants by Category: Number of Transactions 2017-2022
- Table 31 - Sales in Full-Service Restaurants by Category: Foodservice Value 2017-2022
- Table 32 - Full-Service Restaurants by Category: % Units/Outlets Growth 2017-2022
- Table 33 - Sales in Full-Service Restaurants by Category: % Transaction Growth 2017-2022
- Table 34 - Sales in Full-Service Restaurants by Category: % Foodservice Value Growth 2017-2022
- Table 35 - GBO Company Shares in Chained Full-Service Restaurants: % Foodservice Value 2018-2022
- Table 36 - GBN Brand Shares in Chained Full-Service Restaurants: % Foodservice Value 2019-2022
- Table 37 - Forecast Full-Service Restaurants by Category: Units/Outlets 2022-2027
- Table 38 - Forecast Sales in Full-Service Restaurants by Category: Number of Transactions 2022-2027
- Table 39 - Forecast Sales in Full-Service Restaurants by Category: Foodservice Value 2022-2027
- Table 40 - Forecast Full-Service Restaurants by Category: % Units/Outlets Growth 2022-2027
- Table 41 - Forecast Sales in Full-Service Restaurants by Category: % Transaction Growth 2022-2027
- Table 42 - Forecast Sales in Full-Service Restaurants by Category: % Foodservice Value Growth 2022-2027

Limited-Service Restaurants in Vietnam

KEY DATA FINDINGS

2022 DEVELOPMENTS

- Limited-service restaurants rebound in 2022, following a long period of recovery from the pandemic
- Third-party food delivery apps remain popular in driving overall sales
- Chicken limited-service restaurants maintain their popularity, thanks to fried chicken being a top taste in Vietnam

PROSPECTS AND OPPORTUNITIES

- Leading players expected to expand into small towns and rural areas
- Challenges remain due to ongoing economic uncertainties
- International players set to drive ongoing trends and growth

CATEGORY DATA

- Table 43 - Limited-Service Restaurants by Category: Units/Outlets 2017-2022
- Table 44 - Sales in Limited-Service Restaurants by Category: Number of Transactions 2017-2022
- Table 45 - Sales in Limited-Service Restaurants by Category: Foodservice Value 2017-2022
- Table 46 - Limited-Service Restaurants by Category: % Units/Outlets Growth 2017-2022

- Table 47 - Sales in Limited-Service Restaurants by Category: % Transaction Growth 2017-2022
- Table 48 - Sales in Limited-Service Restaurants by Category: % Foodservice Value Growth 2017-2022
- Table 49 - GBO Company Shares in Chained Limited-Service Restaurants: % Foodservice Value 2018-2022
- Table 50 - GBN Brand Shares in Chained Limited-Service Restaurants: % Foodservice Value 2019-2022
- Table 51 - Forecast Limited-Service Restaurants by Category: Units/Outlets 2022-2027
- Table 52 - Forecast Sales in Limited-Service Restaurants by Category: Number of Transactions 2022-2027
- Table 53 - Forecast Sales in Limited-Service Restaurants by Category: Foodservice Value 2022-2027
- Table 54 - Forecast Limited-Service Restaurants by Category: % Units/Outlets Growth 2022-2027
- Table 55 - Forecast Sales in Limited-Service Restaurants by Category: % Transaction Growth 2022-2027
- Table 56 - Forecast Sales in Limited-Service Restaurants by Category: % Foodservice Value Growth 2022-2027

Self-Service Cafeterias in Vietnam

2022 DEVELOPMENTS

Street Stalls/Kiosks in Vietnam

KEY DATA FINDINGS

2022 DEVELOPMENTS

- Number of street stalls/kiosks is growing robustly in 2022
- Street stalls/kiosks also benefits from local culture trends
- Street stalls/kiosks sees both positive and negative impacts from food price increases

PROSPECTS AND OPPORTUNITIES

- Chained street stalls/kiosks expected to boom over the forecast period
- Street stalls/kiosks will continue to benefit from offering low-cost options
- The government's management of street stalls/kiosks remains loose and unclear, which leaves some risks for the operators

CATEGORY DATA

- Table 57 - Street Stalls/Kiosks: Units/Outlets 2017-2022
- Table 58 - Sales in Street Stalls/Kiosks: Number of Transactions 2017-2022
- Table 59 - Sales in Street Stalls/Kiosks: Foodservice Value 2017-2022
- Table 60 - Street Stalls/Kiosks: % Units/Outlets Growth 2017-2022
- Table 61 - Sales in Street Stalls/Kiosks: % Transaction Growth 2017-2022
- Table 62 - Sales in Street Stalls/Kiosks: % Foodservice Value Growth 2017-2022
- Table 63 - GBO Company Shares in Chained Street Stalls/Kiosks: % Foodservice Value 2018-2022
- Table 64 - GBN Brand Shares in Chained Street Stalls/Kiosks: % Foodservice Value 2019-2022
- Table 65 - Forecast Street Stalls/Kiosks: Units/Outlets 2022-2027
- Table 66 - Forecast Sales in Street Stalls/Kiosks: Number of Transactions 2022-2027
- Table 67 - Forecast Sales in Street Stalls/Kiosks: Foodservice Value 2022-2027
- Table 68 - Forecast Street Stalls/Kiosks: % Units/Outlets Growth 2022-2027
- Table 69 - Forecast Sales in Street Stalls/Kiosks: % Transaction Growth 2022-2027
- Table 70 - Forecast Sales in Street Stalls/Kiosks: % Foodservice Value Growth 2022-2027

Consumer Foodservice By Location in Vietnam

KEY DATA FINDINGS

2022 DEVELOPMENTS

- Consumer foodservice through leisure, lodging and travel locations recovers in line with the reopening of tourism
- Standalone maintains its popularity in consumer foodservice
- Foodservice in shopping centres with supermarkets/hypermarkets is growing

PROSPECTS AND OPPORTUNITIES

Standalone expected to grow toward suburban and remote rural areas

Retail locations increasingly important for the foodservice industry over the forecast period

CATEGORY DATA

- Table 71 - Consumer Foodservice by Location: Units/Outlets 2017-2022
- Table 72 - Sales in Consumer Foodservice by Location: Number of Transactions 2017-2022
- Table 73 - Sales in Consumer Foodservice by Location: Foodservice Value 2017-2022
- Table 74 - Consumer Foodservice by Location: % Units/Outlets Growth 2017-2022
- Table 75 - Sales in Consumer Foodservice by Location: % Transaction Growth 2017-2022
- Table 76 - Sales in Consumer Foodservice by Location: % Foodservice Value Growth 2017-2022
- Table 77 - Consumer Foodservice through Standalone: Units/Outlets 2017-2022
- Table 78 - Sales in Consumer Foodservice through Standalone: Number of Transactions 2017-2022
- Table 79 - Sales in Consumer Foodservice through Standalone: Foodservice Value 2017-2022
- Table 80 - Consumer Foodservice through Standalone: % Units/Outlets Growth 2017-2022
- Table 81 - Sales in Consumer Foodservice through Standalone: % Transaction Growth 2017-2022
- Table 82 - Sales in Consumer Foodservice through Standalone: % Foodservice Value Growth 2017-2022
- Table 83 - Consumer Foodservice through Leisure: Units/Outlets 2017-2022
- Table 84 - Sales in Consumer Foodservice through Leisure: Number of Transactions 2017-2022
- Table 85 - Sales in Consumer Foodservice through Leisure: Foodservice Value 2017-2022
- Table 86 - Consumer Foodservice through Leisure: % Units/Outlets Growth 2017-2022
- Table 87 - Sales in Consumer Foodservice through Leisure: % Transaction Growth 2017-2022
- Table 88 - Sales in Consumer Foodservice through Leisure: % Foodservice Value Growth 2017-2022
- Table 89 - Consumer Foodservice through Retail: Units/Outlets 2017-2022
- Table 90 - Sales in Consumer Foodservice through Retail: Number of Transactions 2017-2022
- Table 91 - Sales in Consumer Foodservice through Retail: Foodservice Value 2017-2022
- Table 92 - Consumer Foodservice through Retail: % Units/Outlets Growth 2017-2022
- Table 93 - Sales in Consumer Foodservice through Retail: % Transaction Growth 2017-2022
- Table 94 - Sales in Consumer Foodservice through Retail: % Foodservice Value Growth 2017-2022
- Table 95 - Consumer Foodservice through Lodging: Units/Outlets 2017-2022
- Table 96 - Sales in Consumer Foodservice through Lodging: Number of Transactions 2017-2022
- Table 97 - Sales in Consumer Foodservice through Lodging: Foodservice Value 2017-2022
- Table 98 - Consumer Foodservice through Lodging: % Units/Outlets Growth 2017-2022
- Table 99 - Sales in Consumer Foodservice through Lodging: % Transaction Growth 2017-2022
- Table 100 - Sales in Consumer Foodservice through Lodging: % Foodservice Value Growth 2017-2022
- Table 101 - Consumer Foodservice through Travel: Units/Outlets 2017-2022
- Table 102 - Sales in Consumer Foodservice through Travel: Number of Transactions 2017-2022
- Table 103 - Sales in Consumer Foodservice through Travel: Foodservice Value 2017-2022
- Table 104 - Consumer Foodservice through Travel: % Units/Outlets Growth 2017-2022
- Table 105 - Sales in Consumer Foodservice through Travel: % Transaction Growth 2017-2022
- Table 106 - Sales in Consumer Foodservice through Travel: % Foodservice Value Growth 2017-2022
- Table 107 - Forecast Consumer Foodservice by Location: Units/Outlets 2022-2027
- Table 108 - Forecast Sales in Consumer Foodservice by Location: Number of Transactions 2022-2027
- Table 109 - Forecast Sales in Consumer Foodservice by Location: Foodservice Value 2022-2027
- Table 110 - Forecast Consumer Foodservice by Location: % Units/Outlets Growth 2022-2027
- Table 111 - Forecast Sales in Consumer Foodservice by Location: % Transaction Growth 2022-2027
- Table 112 - Forecast Sales in Consumer Foodservice by Location: % Foodservice Value Growth 2022-2027
- Table 113 - Forecast Consumer Foodservice through Standalone: Units/Outlets 2022-2027
- Table 114 - Forecast Sales in Consumer Foodservice through Standalone: Number of Transactions 2022-2027
- Table 115 - Forecast Sales in Consumer Foodservice through Standalone: Foodservice Value 2022-2027
- Table 116 - Forecast Consumer Foodservice through Standalone: % Units/Outlets Growth 2022-2027
- Table 117 - Forecast Sales in Consumer Foodservice through Standalone: % Transaction Growth 2022-2027
- Table 118 - Forecast Sales in Consumer Foodservice through Standalone: % Foodservice Value Growth 2022-2027
- Table 119 - Forecast Consumer Foodservice through Leisure: Units/Outlets 2022-2027

Table 120 - Forecast Sales in Consumer Foodservice through Leisure: Number of Transactions 2022-2027
Table 121 - Forecast Sales in Consumer Foodservice through Leisure: Foodservice Value 2022-2027
Table 122 - Forecast Consumer Foodservice through Leisure: % Units/Outlets Growth 2022-2027
Table 123 - Forecast Sales in Consumer Foodservice through Leisure: % Transaction Growth 2022-2027
Table 124 - Forecast Sales in Consumer Foodservice through Leisure: % Foodservice Value Growth 2022-2027
Table 125 - Forecast Consumer Foodservice through Retail: Units/Outlets 2022-2027
Table 126 - Forecast Sales in Consumer Foodservice through Retail: Number of Transactions 2022-2027
Table 127 - Forecast Sales in Consumer Foodservice through Retail: Foodservice Value 2022-2027
Table 128 - Forecast Consumer Foodservice through Retail: % Units/Outlets Growth 2022-2027
Table 129 - Forecast Sales in Consumer Foodservice through Retail: % Transaction Growth 2022-2027
Table 130 - Forecast Sales in Consumer Foodservice through Retail: % Foodservice Value Growth 2022-2027
Table 131 - Forecast Consumer Foodservice through Lodging: Units/Outlets 2022-2027
Table 132 - Forecast Sales in Consumer Foodservice through Lodging: Number of Transactions 2022-2027
Table 133 - Forecast Sales in Consumer Foodservice through Lodging: Foodservice Value 2022-2027
Table 134 - Forecast Consumer Foodservice through Lodging: % Units/Outlets Growth 2022-2027
Table 135 - Forecast Sales in Consumer Foodservice through Lodging: % Transaction Growth 2022-2027
Table 136 - Forecast Sales in Consumer Foodservice through Lodging: % Foodservice Value Growth 2022-2027
Table 137 - Forecast Consumer Foodservice through Travel: Units/Outlets 2022-2027
Table 138 - Forecast Sales in Consumer Foodservice through Travel: Number of Transactions 2022-2027
Table 139 - Forecast Sales in Consumer Foodservice through Travel: Foodservice Value 2022-2027
Table 140 - Forecast Consumer Foodservice through Travel: % Units/Outlets Growth 2022-2027
Table 141 - Forecast Sales in Consumer Foodservice through Travel: % Transaction Growth 2022-2027
Table 142 - Forecast Sales in Consumer Foodservice through Travel: % Foodservice Value Growth 2022-2027

About Euromonitor International

Euromonitor International is an independent market intelligence provider. Data, insight and analysis stem from in-the-field research spanning 210 national markets.

Content ranges from the in-depth and country-specific, to key strategic themes with a global range and significance. Products cover a comprehensive range of insights and market data, but can be broadly categorised as:

- **Strategy Briefings:** Global or regional in scope, and focussing on the most important themes shaping consumer demand, the key markets, competitive environment and future outlook across a range of industries.
- **Company Profiles:** Analysis dedicated to the world's most significant companies, with detailed insight into their activities, focus of operations, their competitors, their geographic presence and performance.
- **Country Reports:** For an in-depth understanding of specific countries, whether by industry, economic metrics or consumer trends and lifestyles. These reports cover current trends, consumer demand, market potential and future prospects, with country-specific local insight and comprehensive data, unavailable elsewhere.

For more information on this report, further enquiries can be directed via this link www.euromonitor.com/consumer-foodservice-in-vietnam/report.