

Vietnam Food Services Market By Type (Dining Service (Hotels, Restaurants), QSR (Quick Service Restaurants), Cafes, and Others (Cafeteria, Cloud Kitchen, etc.)), By Ownership (Standalone Outlets and Chained Outlets), By Brands (Domestic, International), By Region, By Competition Forecast & Opportunities, 2018-2028F

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Abstracts

Vietnam Food Services Market has valued at USD 20.01 billion in 2022 and is anticipated to project robust growth in the forecast period with a CAGR of 10.5% through 2028. Vietnam, renowned for its rich culinary heritage and diverse street food culture, hosts a vibrant and dynamic food services market that reflects the nation's deep-rooted gastronomic traditions and its rapidly evolving modern dining scene.

Food holds immense cultural significance in Vietnam. It is not merely sustenance but a reflection of the country's history, geography, and regional diversity. Vietnamese cuisine is characterized by its use of fresh ingredients, herbs, and a balance of flavors. Meals are often communal, fostering a sense of togetherness and hospitality.

Vietnam's food services market is incredibly diverse, catering to a wide spectrum of dining preferences and budgets. It encompasses an array of dining options, including street food vendors, traditional family-owned eateries (known as 'qu?n'), upscale restaurants, and international fast-food chains. This diversity makes Vietnamese cuisine accessible to both locals and tourists.

Vietnam is renowned for its street food culture, with bustling markets and street corners offering an array of delectable dishes. Pho (noodle soup), banh mi (baguette

sandwiches), bun cha (grilled pork noodles), and com tam (broken rice) are just a few examples of beloved street food items. Street vendors often operate with generations-old recipes, preserving the authenticity of Vietnamese flavors.

Vietnam's regional diversity is reflected in its cuisine, with each region boasting unique specialties. The north is known for its delicate and subtly flavored dishes, while the central region offers spicy and complex flavors. The south, including Ho Chi Minh City (Saigon), is famous for its vibrant street food scene and fusion cuisine.

As Vietnam undergoes rapid urbanization and economic growth, modern dining concepts, including international franchises and upscale restaurants, are becoming increasingly popular, particularly among urban populations. Additionally, there is a growing awareness of health and sustainability in Vietnam's food services market. Consumers are seeking healthier options, and restaurants are responding by incorporating organic ingredients and reducing food waste. Furthermore, the rise of online food delivery platforms has revolutionized the dining experience in Vietnam. Services like GrabFood and Now.vn have made it convenient for consumers to order their favorite dishes from local eateries and international chains. In addition, Vietnamese chefs are experimenting with fusion cuisine, blending traditional flavors with international influences. This trend is especially prominent in urban centers where a younger generation of diners seeks innovative dining experiences.

The future of Vietnam's food services market appears promising. With a growing middle class, increasing disposable incomes, and a continued focus on culinary innovation, the industry is poised for further growth. As Vietnam's tourism industry continues to expand, it will further boost the demand for a diverse range of dining options, from street food to upscale dining experiences. In this ever-evolving landscape, Vietnam's food services market remains a vibrant and integral part of the nation's culture and economy, attracting both locals and international food enthusiasts.

Key Market Drivers

Rapid Urbanization and Rising Disposable Incomes

One of the primary drivers of the burgeoning food services market in Vietnam is the country's rapid urbanization and the associated increase in disposable incomes. As more people move from rural areas to urban centers in search of employment and improved living standards, they are contributing to the urbanization trend that is reshaping the nation's landscape.

Urbanization has several profound impacts on the food services sector. Firstly, it creates a growing demand for convenient dining options, as urban dwellers have busier lifestyles and less time for traditional home-cooked meals. This has led to a surge in the popularity of quick-service restaurants (QSRs), street food vendors, and food delivery services. Fast-casual dining concepts have also gained traction, providing a middle ground between traditional dining and fast food.

Secondly, urbanization tends to raise incomes, enabling people to allocate more of their budgets to eating out. With greater disposable incomes, consumers are more willing to explore diverse dining experiences, from upscale restaurants to international cuisine. This has fueled the growth of fine dining establishments, specialty eateries, and fusion restaurants, catering to a more discerning and adventurous palate.

Additionally, the influx of rural-to-urban migration has spurred entrepreneurial opportunities in the food services industry. Many individuals and families have opened small-scale eateries, contributing to the vibrancy and diversity of Vietnam's culinary scene. These local establishments often serve traditional dishes, providing a sense of nostalgia and authenticity to city dwellers.

Young Demographic Profile and Changing Consumer Preferences

Vietnam's demographic profile skews young, with a significant portion of the population falling into the millennial and Generation Z age groups. These young consumers have different dining habits and preferences compared to their older counterparts, influencing the food services market in several ways.

Firstly, younger generations tend to be more open to trying new foods and flavors, leading to an increased interest in international cuisines. Vietnamese consumers are embracing global culinary trends, seeking out Japanese sushi, Korean barbecue, Western fast food, and Mediterranean fare, among others. This has given rise to a wide range of international restaurants and franchises operating in Vietnam.

Secondly, younger consumers are health-conscious and environmentally aware. They are more likely to prioritize fresh, organic, and sustainably sourced ingredients. This has prompted restaurants to adapt by offering healthier menu options, emphasizing locally sourced produce, and reducing their environmental footprint through sustainable practices.

Thirdly, the digital era has greatly impacted consumer behavior. Younger generations, in particular, are tech-savvy and rely heavily on smartphones for various aspects of their lives, including dining. This has led to the proliferation of food delivery apps and online ordering platforms, providing a convenient way for consumers to access their favorite meals. Restaurants that fail to adapt to this digital landscape may find it challenging to compete.

Tourism and International Exposure

Vietnam's burgeoning tourism industry is another major driver of its food services market. The country's scenic landscapes, rich cultural heritage, and historical attractions have drawn a growing number of international tourists, exposing them to Vietnamese cuisine and creating opportunities for food services businesses.

Tourists often seek authentic culinary experiences, and Vietnamese street food, such as pho, banh mi, and spring rolls, has gained global recognition for its delicious flavors and affordability. Street food vendors and local eateries have benefited from this influx of visitors, contributing to the overall growth of the food services sector.

Moreover, tourism has led to a diversification of dining options to cater to the international palate. In major tourist destinations like Hanoi, Ho Chi Minh City, and Hoi An, one can find a wide range of restaurants offering international cuisines, including French, Italian, Thai, and Indian. This not only enhances the dining experience for tourists but also broadens the culinary horizons of local residents.

Key Market Challenges

Intense Competition and Saturation

One of the foremost challenges facing the Vietnam food services market is the intense competition and market saturation, particularly in urban areas like Hanoi and Ho Chi Minh City. The sector has witnessed significant growth in recent years, leading to an abundance of dining options ranging from street vendors to upscale restaurants. While this variety benefits consumers, it creates a fiercely competitive environment for businesses.

The saturation is particularly pronounced in certain segments, such as fast food and casual dining, where international chains like McDonald's, KFC, and Pizza Hut compete with numerous local players. This competition exerts downward pressure on prices,

making it difficult for businesses to maintain profitability. As new entrants continue to join the market, established restaurants must continually innovate to differentiate themselves and retain customer loyalty.

Evolving Consumer Preferences and Health Concerns

Vietnamese consumers' preferences are evolving, with a growing demand for healthier, more diverse, and environmentally sustainable dining options. While Vietnamese cuisine is known for its fresh ingredients and balance of flavors, there is a shift towards healthier eating habits, including reduced oil and sugar intake and increased consumption of fruits and vegetables.

In response to these changing preferences, many food service establishments are modifying their menus to include lighter and more nutritious options. However, this transition can be challenging, as it requires sourcing high-quality ingredients, retraining kitchen staff, and potentially redesigning existing menus. Balancing tradition and innovation is a delicate process, and businesses that fail to adapt may face declining customer numbers.

Furthermore, health concerns, including food safety and hygiene, are critical for consumers. Ensuring consistent food safety standards and transparency in the supply chain is a constant challenge. Any lapses in food safety can lead to reputational damage and financial setbacks for food service providers.

Labor Shortages and Rising Labor Costs

The Vietnam food services market grapples with labor shortages and rising labor costs, particularly in larger cities. As the economy has grown, there has been a shift away from traditional agriculture, leading to urbanization and increased demand for labor in various sectors, including hospitality and food services.

Restaurants, cafes, and food establishments often struggle to attract and retain skilled and reliable staff, such as chefs, servers, and kitchen workers. The competition for labor has driven up wages and benefits, affecting the profitability of businesses. In addition to higher wages, businesses must also navigate complex labor regulations, which can be a burden, especially for smaller establishments.

The labor shortage issue has been exacerbated by the COVID-19 pandemic, which led to temporary closures, reduced working hours, and layoffs, causing many experienced

workers to seek employment in other industries or regions.

To address these labor-related challenges, some businesses have turned to automation and technology to streamline operations, reduce reliance on human labor, and improve efficiency. However, this transition requires substantial investment and may not be feasible for all types of food service establishments.

Key Market Trends

Fusion Cuisine and Global Influences

One of the most striking trends in the Vietnamese food services market is the emergence of fusion cuisine and the incorporation of global culinary influences into traditional Vietnamese dishes. This trend reflects Vietnam's growing openness to international flavors and its desire to cater to both local and expatriate populations with diverse tastes.

Vietnamese chefs and restaurateurs are creatively blending Vietnamese ingredients and techniques with global flavors, resulting in innovative and unique dishes. For example, you can find Vietnamese-inspired pizza with toppings like lemongrass chicken and fish sauce-infused drizzles or hamburgers garnished with fresh herbs and chili. These creative fusions not only offer new taste experiences but also showcase the adaptability of Vietnamese cuisine.

Furthermore, international fast-food chains and restaurant brands have made significant inroads into the Vietnamese market. From American burger joints to Japanese sushi bars and Italian pizzerias, global franchises are tailoring their menus to incorporate local ingredients and flavors, making their offerings more appealing to Vietnamese consumers. This trend reflects the influence of globalization and the desire for diverse dining options.

Health and Wellness Focus

Health and wellness have become increasingly important considerations in the Vietnamese food services market. Consumers are becoming more health-conscious and are seeking options that align with their dietary preferences and lifestyle choices.

One notable sub-trend is the rise of vegetarian and vegan dining. Vegetarian and vegan restaurants, as well as vegetarian-friendly menu options, are becoming more

widespread. These establishments cater to both those following plant-based diets for ethical or health reasons and those seeking lighter and healthier meal choices. Traditional Vietnamese vegetarian dishes like 'com chay' (vegetarian rice) and 'pho chay' (vegetarian pho) have gained popularity among locals and tourists alike.

Additionally, restaurants and cafes are increasingly incorporating organic and locally sourced ingredients into their menus. This shift reflects the desire for fresh, pesticide-free produce and supports sustainable agricultural practices. Organic food markets and farm-to-table dining experiences have also become more prevalent, connecting consumers with the source of their food.

Furthermore, health-oriented menu labeling, allergen information, and calorie counts are becoming more common, allowing diners to make informed choices. These initiatives promote transparency and empower consumers to make healthier decisions when dining out.

Technology Integration and Delivery Services

The Vietnamese food services market has witnessed a rapid integration of technology into its operations. The advent of smartphones and the growth of the digital economy have transformed how consumers interact with food services establishments.

Online food delivery services have experienced explosive growth, with numerous platforms competing for market share. Companies like GrabFood, GoFood, and Now.vn have made ordering food as easy as tapping a smartphone screen. This convenience-driven trend has not only benefited established restaurants but has also given rise to a new breed of 'cloud kitchens' that operate solely for delivery purposes.

In addition to delivery, technology has impacted the dining experience itself. Many restaurants now offer digital menus that customers can access via QR codes on their smartphones. This touchless dining experience minimizes physical contact with traditional menus, contributing to hygiene and safety in the post-pandemic era.

Furthermore, loyalty programs and mobile apps are common tools used by restaurants to engage with customers, offer discounts, and collect valuable data for marketing and menu development.

Segmental Insights

Type Insights

Quick Service Restaurants (QSRs) have established a notable presence and wield significant influence in the Vietnam food services market, reflecting the country's evolving dining habits, urbanization, and a burgeoning middle class. These QSR establishments have become an integral part of Vietnam's culinary landscape, offering quick, convenient, and affordable dining options that cater to a wide range of consumers.

Vietnam is undergoing rapid urbanization, with a growing number of people moving to cities in search of better employment opportunities. As urban centers expand, lifestyles become busier, and people increasingly turn to QSRs for meals that are quick to order and consume. QSRs align perfectly with the pace of modern urban living.

QSRs in Vietnam provide a diverse menu that caters to local and international tastes. Traditional Vietnamese flavors, such as pho, banh mi, and spring rolls, coexist with international staples like burgers, fried chicken, pizza, and sandwiches. This variety ensures that QSRs appeal to a broad cross-section of the population.

One of the defining features of QSRs is affordability. The relatively low prices make QSRs accessible to a wide range of consumers, including students, young professionals, and families. This affordability is particularly appealing in a country where price-consciousness is prevalent.

QSR chains have aggressively expanded their presence throughout Vietnam. Their outlets can be found in bustling city centers, shopping malls, transport hubs, and even in suburban areas, ensuring easy access for customers. This strategic expansion has played a crucial role in their market dominance.

Quick service is at the core of QSRs' success. In a fast-paced world, customers appreciate the convenience and speed of ordering, paying, and receiving their meals. Drive-thru options and efficient in-store service further enhance this convenience.

QSRs in Vietnam have embraced technology to enhance customer experience. Mobile apps for ordering and delivery have gained popularity, allowing customers to customize orders and enjoy special promotions. This tech-savvy approach resonates with the country's digitally connected population.

Many international QSR chains operating in Vietnam have adapted their menus to

incorporate local flavors and ingredients. This fusion of international and local culinary elements caters to Vietnamese tastes while maintaining the familiarity of global brands.

The growth of QSR chains in Vietnam has contributed to job creation, providing employment opportunities for thousands of locals in various roles, from kitchen staff to management positions.

Vietnam has a predominantly youthful population, and QSRs have successfully positioned themselves as attractive dining options for the younger generation. The appeal of international branding, affordability, and convenience align well with the preferences of Vietnam's youth.

Ownership Insights

Chained outlets have carved out a substantial and noteworthy presence in the Vietnam Food Services Market, marking a significant shift in the country's dining landscape. This evolution is driven by a combination of factors, including changing consumer preferences, urbanization, increased disposable income, and the allure of standardized quality and convenience offered by these establishments.

Chained outlets, also known as chain restaurants or restaurant chains, have experienced remarkable growth in Vietnam. These are restaurants or eateries that have multiple branches under a single brand, providing consistency in both menu offerings and dining experience. Vietnam has seen a proliferation of such chains, covering a spectrum of cuisines from fast food and casual dining to international and local flavors.

The rapid urbanization of Vietnam, particularly in cities like Hanoi and Ho Chi Minh City, has led to busier and more fast-paced lives. As urban dwellers seek convenience and speed, chained outlets have stepped in to cater to these modern lifestyles. These establishments offer quick service, consistent quality, and familiar menus, making them appealing choices for individuals and families alike.

Chained outlets are known for their strict adherence to standardized recipes, preparation methods, and service procedures. This commitment to consistency ensures that customers can expect the same level of quality and taste at any branch of the chain. In a market where food safety and hygiene are of paramount concern, this standardized approach has resonated with consumers.

The Vietnam Food Services Market features a mix of international and domestic

chained outlets. Renowned global chains like McDonald's, KFC, Starbucks, and Pizza Hut have successfully expanded their presence in the country. Simultaneously, Vietnamese chains, such as Pho 24, Highlands Coffee, and Lotteria, have also emerged as strong players, offering unique flavors and concepts tailored to local preferences.

Chained outlets in Vietnam cater to diverse tastes and preferences. While fast-food chains like McDonald's and Burger King are popular among the younger demographic, casual dining chains like The Pizza Company and BBQ Chicken offer sit-down experiences suitable for families and groups. Local chains often blend traditional Vietnamese flavors with modern dining concepts, creating a fusion of tastes.

Chained outlets in Vietnam have adopted technology to enhance customer experiences. Many offer online ordering and delivery services, allowing customers to enjoy their favorite dishes from the comfort of their homes. Mobile apps and loyalty programs have also become common features, enticing customers to return for more.

Vietnam's robust economic growth and a burgeoning middle class have resulted in increased disposable incomes. As people's spending power has grown, they are more willing to dine out and explore different culinary options, including those offered by chained outlets.

Regional Insights

The Northern Region of Vietnam, comprising provinces and cities such as Hanoi, Hai Phong, and others, commands a substantial share in the country's dynamic food services market. This region's influence is driven by a combination of cultural heritage, economic activity, and a thriving culinary scene.

Hanoi, the capital city of Vietnam, is often referred to as the culinary capital of the country. It is home to an extensive array of traditional Vietnamese dishes and street food, offering a rich tapestry of flavors and culinary traditions. The city's renowned street markets like the Old Quarter and Dong Xuan Market are bustling hubs of gastronomic delights, drawing both locals and tourists seeking authentic Vietnamese cuisine.

The Northern Region's food culture is deeply rooted in tradition and reflects the history and heritage of Vietnam. Pho, bun cha, bun thang, and cha ca are just a few examples of iconic Northern Vietnamese dishes that have gained national and international acclaim. The region's diverse cuisine attracts food enthusiasts from across the country.

Northern Vietnam has witnessed significant economic growth and urbanization, particularly in cities like Hanoi and Hai Phong. This has led to an increase in the number of restaurants, cafes, and food outlets to cater to the growing population and a rising middle class with disposable income for dining out.

The Vietnamese government has actively promoted tourism and the food services industry as part of its economic development strategy. Initiatives like 'Vietnam Tourism Year' have focused on showcasing the country's culinary heritage, boosting the visibility and popularity of Northern Vietnamese cuisine.

The Northern Region is known for its vibrant street food culture, where locals and visitors can savor a wide range of dishes on the sidewalks. From bun cha (grilled pork with noodles) to banh mi (Vietnamese sandwiches), these street food vendors contribute significantly to the region's food services market.

The Northern Region boasts numerous tourist attractions, including historical sites, cultural landmarks, and natural wonders. Tourists exploring these attractions often seek authentic local food experiences, boosting the demand for food services in the area.

The Northern Region has also been influenced by international cuisines, especially in urban areas. International restaurants, cafes, and fast-food chains have found success in cities like Hanoi, offering a diverse range of dining options.

Northern Vietnam hosts various festivals and events, many of which are centered around food. The Tet (Lunar New Year) celebrations, for example, feature an array of traditional dishes and street food stalls, creating a vibrant food festival atmosphere.

Northern Vietnam has embraced culinary tourism, with cooking classes, food tours, and farm-to-table experiences becoming increasingly popular. Tourists are eager to learn about the region's culinary traditions and ingredients.

The food services market in the Northern Region is highly competitive, with both traditional and modern dining establishments vying for customers' attention. This competition drives innovation, quality, and a commitment to preserving Northern Vietnam's culinary heritage.

Key Market Players

CP All PCL

Golden Gate JSC

Imex Pan Pacific Group

Jollibee Foods Corporation

Lotte GRS Co. Ltd

Mesa Group

Restaurant Brands International Inc.

Starbucks Corporation

The Al Fresco's Group Vietnam

Yum! Brands Inc.

Report Scope:

In this report, the VIETNAM Food Services market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

Vietnam Food Services Market, By Type:

Dining Service (Hotels, Restaurants)

QSR (Quick Service Restaurants)

Cafes

Others

Vietnam Food Services Market, By Ownership:

Standalone Outlets

Chained Outlets

Vietnam Food Services Market, By Brands:

Domestic

International

Vietnam Food Services Market, By Region:

Northern

Southern

Central

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the Vietnam Food Services market.

Available Customizations:

Vietnam Food Services Market report with the given market data, Tech Sci Research offers customizations according to a company's specific needs. The following customization options are available for the report:

Company Information

Detailed analysis and profiling of additional market players (up to five).

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