



Vietnam's Coffee Chain Landscape: Insights from Receipt Analysis

Q&Me is online market research provided by Asia Plus Inc.

Asia Plus Inc.



Overview

This report illustrates how Vietnamese consumers use and experience coffee in their daily lives, focusing on actual ordering and drinking behaviors rather than stated preferences. The study covers 5 major coffee chains in Vietnam, including Trung Nguyen Legend, Starbucks, Phuc Long, Katinat and Highland.

The analysis draws from a sample of 200 consumers across Ho Chi Minh City and Hanoi who recently visited these chains. By analyzing specific items on their receipts, the report uncovers popular menu choices, average transaction values and consumption patterns across different brands and urban locations.

Conducted in March 2026, this report offers a clear snapshot of current coffee culture behaviors in urban Vietnam and serves as a basis for understanding how consumers interact with drinks in their everyday lives.



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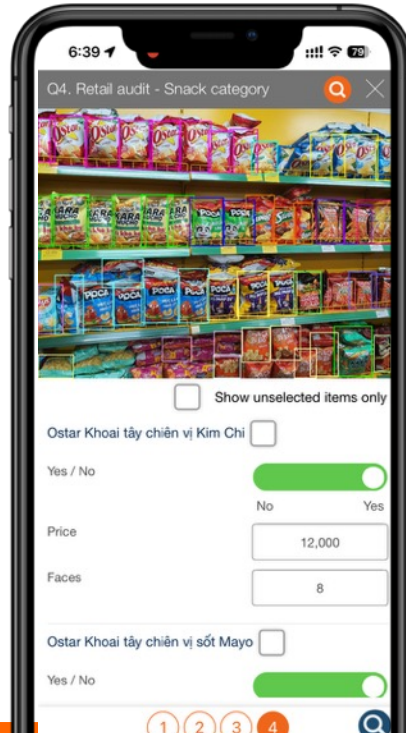
How we worked on it?

We used our **AI image recognition feature** to analyze the store execution status with a photo taking at the target stores.

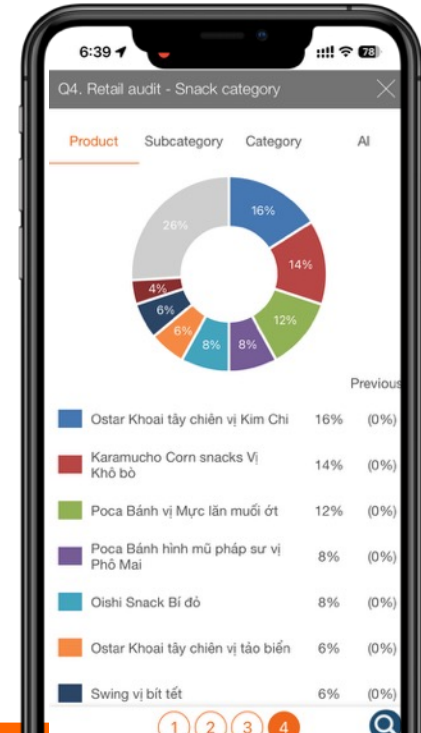
Take photo



Product recognized with pricing and # of faces



Share calculation



About this research

We surveyed 200 consumers across five chain store brands, with 40 groups per chain, to understand what customers order at the shops, in HCM and Hanoi.

Brands that we collected the data at



N = 40



N = 40



Coffee & Tea

N = 40



N = 40



N = 40

Data collection was balanced across

- 50% on weekday/ 50% on weekend
- 50% in HCM/ 50% in Hanoi
- 50% during morning time (9:00 – 10:00)/ 50% during evening time (19:00 – 20:00)

About product and terminology

The drink categories used in this report are defined as follows. Each category groups beverages based on their base ingredients, preparation style, and typical menu positioning.

Black coffee

Americano, Espresso, Long black, Drip coffee

Milk coffee

Latte, Cappuccino, Flat white, Macchiato

Flavoured coffee

Mocha, Caramel latte, Vanilla latte, Hazelnut coffee

Blended coffee

Frappuccino, Ice-blended coffee, Coffee smoothies

Milk tea

Bubble tea, Boba, Taro milk tea, Thai tea — tea base with milk

Iced tea

Plain cold-brewed or iced black/green tea, no milk

Matcha / green tea drinks

Matcha latte, Matcha frappe, green tea latte — matcha-based

Fruit drinks

Fruit juice, Fruit tea, Lemonade, Smoothies — no tea/coffee base



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User behavior summary

Visits are typically low-spend and beverage-focused, with small group sizes, limited item purchases, and relatively low promotion usage across transactions.



Average spending
110,000 VND



Number of guests / group
1.6 people



Average spending / guest
63,000 VND



Average items / visit
1.7 items



Drink only
77%

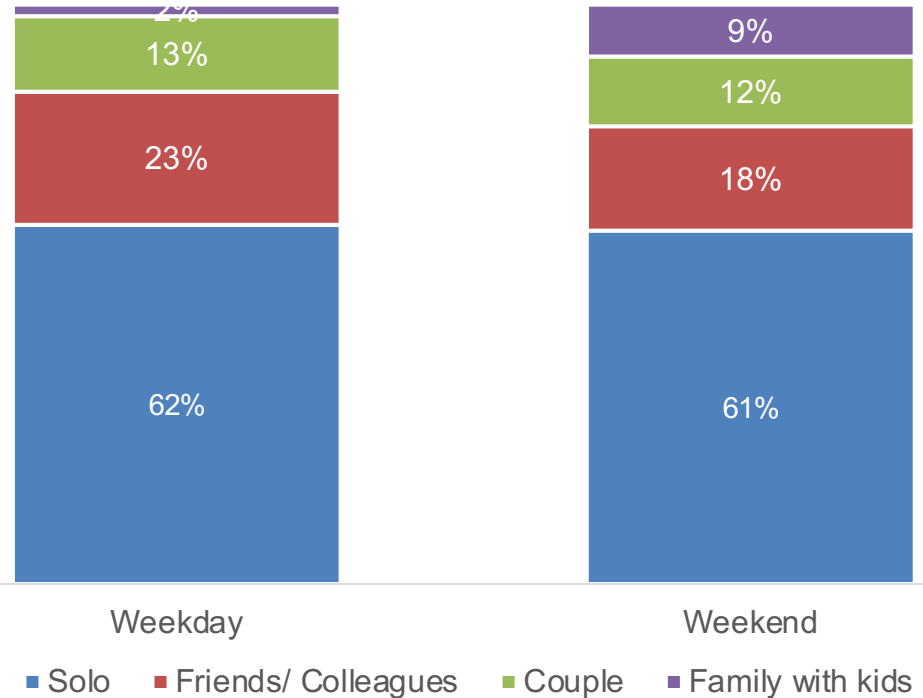


Promotion applied to
18% of the purchase



Visitor types

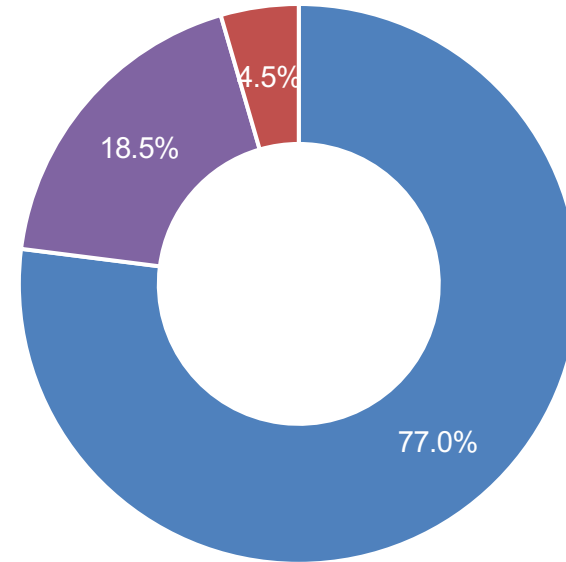
Solo visits dominate across both weekday and weekend, while social visits increase slightly on weekends, with more family and group occasions compared to weekdays.





Order pattern breakdown

77% of the shopper order drink only. Those who order drink + foods account for 18.5%

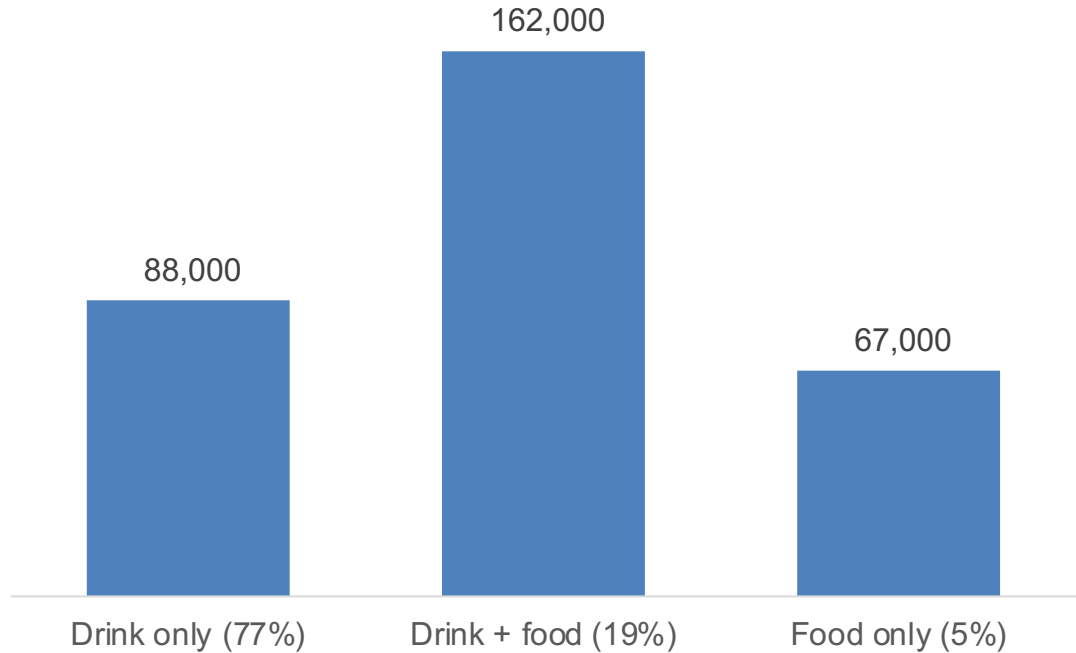


■ Drink only ■ Drink + food ■ Food only



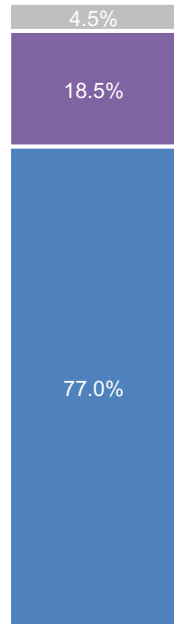
Spending per order

Food attachment adds ~74K VND on top of a baseline drink order. Food-only visits are the lowest spend — mostly single pastry/snack purchases.



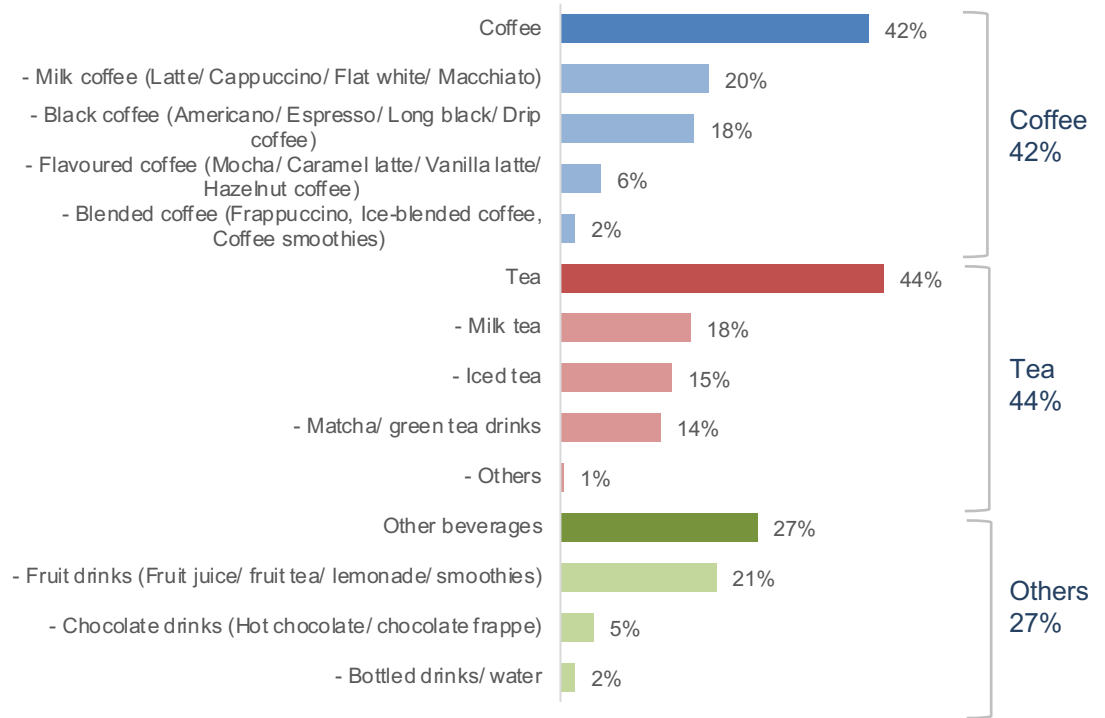
Drink popularity

Beverage consumption dominates, with coffee and tea leading at similar levels, while fruit and other drinks play smaller, complementary roles in overall preferences.



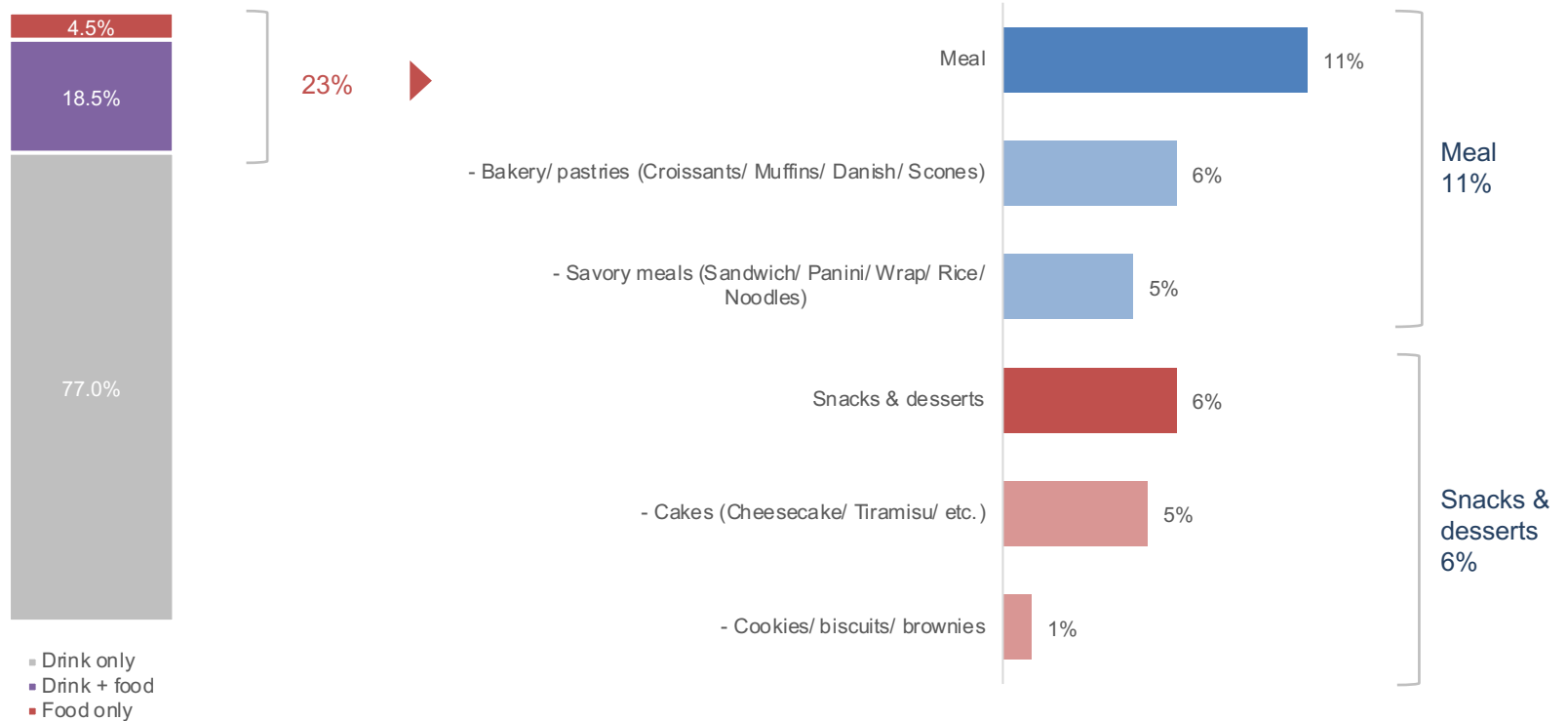
- Drink only
- Drink + food
- Food only

95.5%



Food popularity

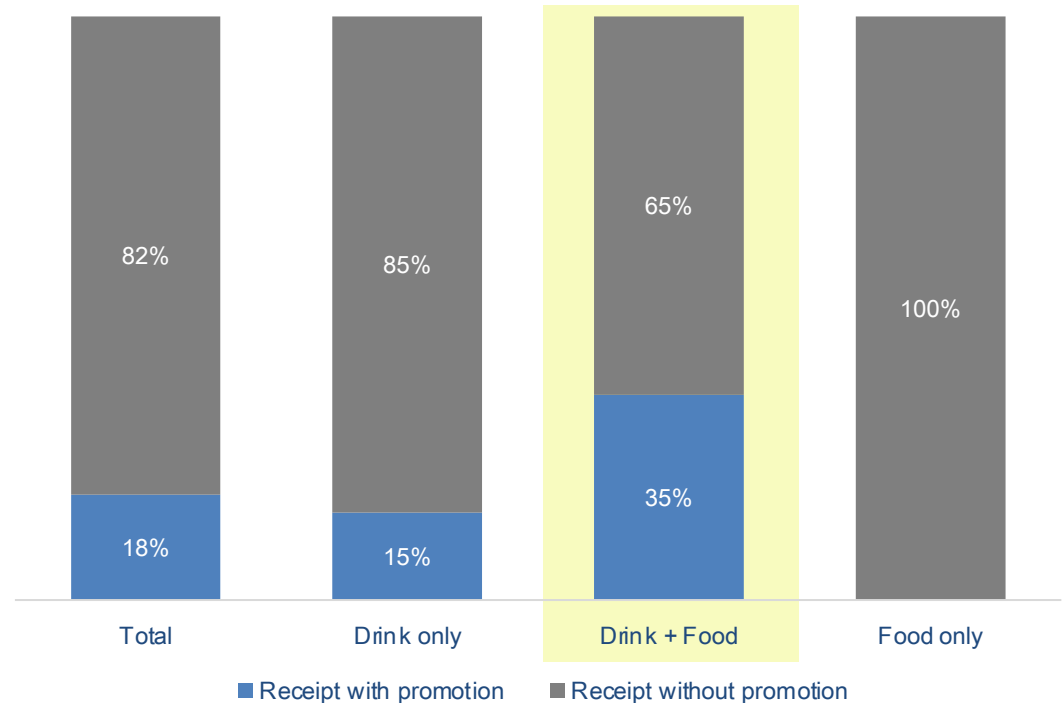
Food plays a secondary role, with only 23% including food. Meals slightly lead over snacks, while bakery items and light savory options dominate consumption occasions.





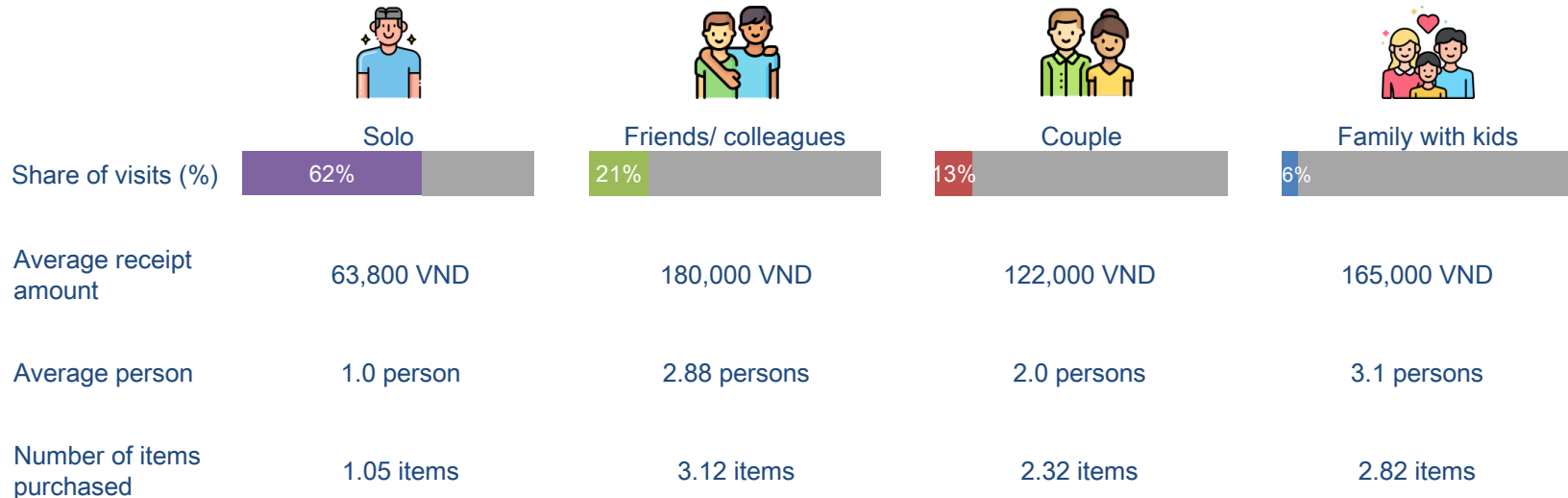
Promotion applications

Promotion usage remains limited overall, with higher application in combined drink and food purchases, while drink-only and food-only transactions show relatively low engagement.



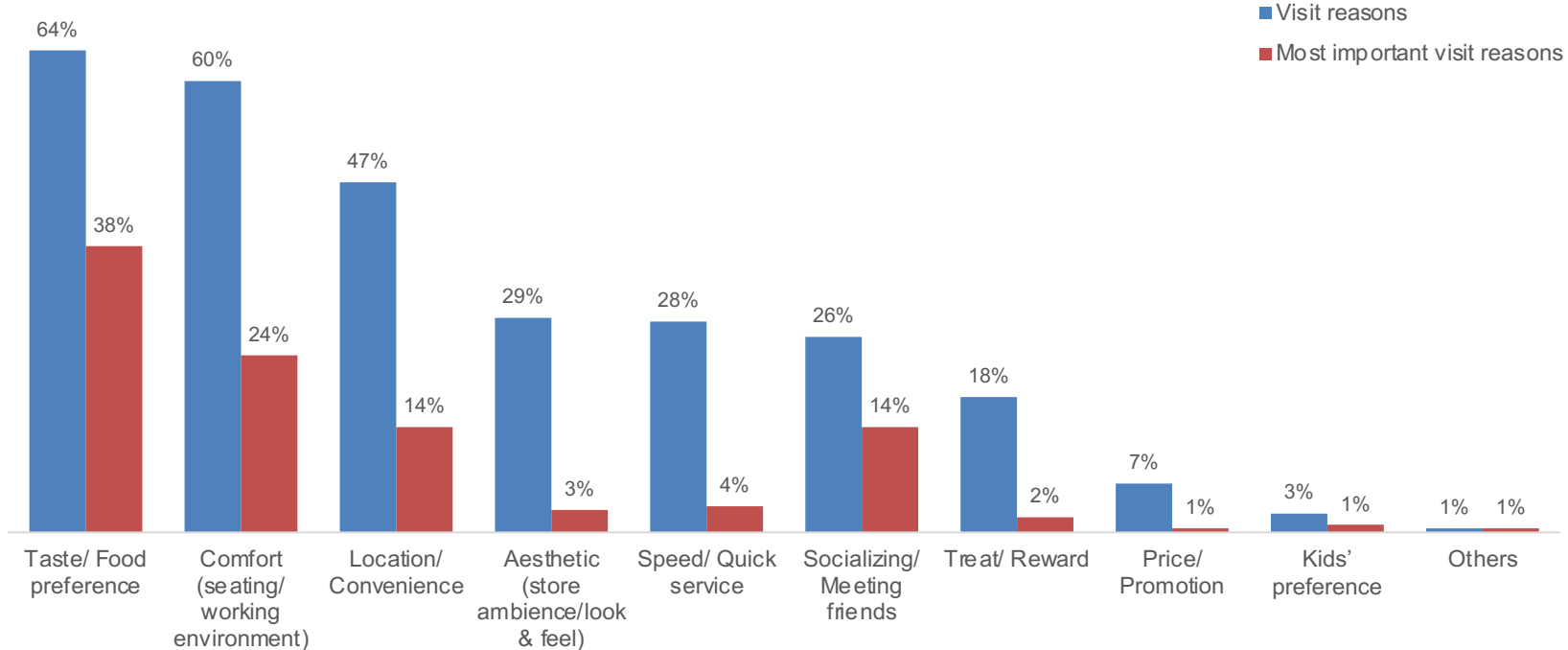
Spending per order - per profile

While solo visits dominate traffic, group occasions, especially friends and families, are the primary drivers of transaction value, delivering 2-3x higher spend through larger basket sizes and multi-item ordering.



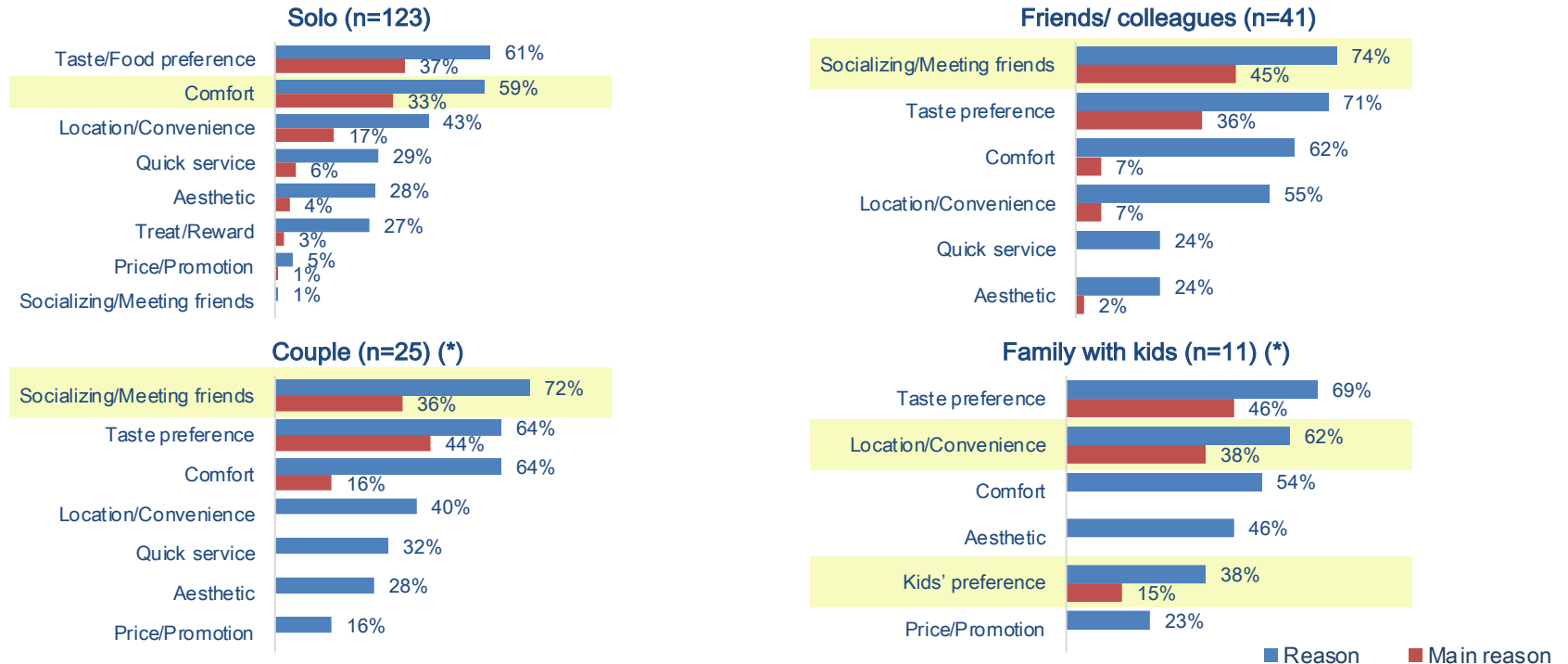
Reasons to select the visited cafe

Taste preference, comfort and location are the top 3 reasons, followed by atmosphere or service quickness.



Reason to select coffee stores - by profile

Besides taste being the key factor, each group has distinct priorities based on their purpose: solo customers value comfort for studying or working, friends/colleagues and couples see cafés as social and meeting spaces while families with kids prioritize location, convenience and kid-friendly options.



What they order at the store – by menu type

Solo customers mainly order drinks while groups, especially families with kids, tend to order both drinks and food.

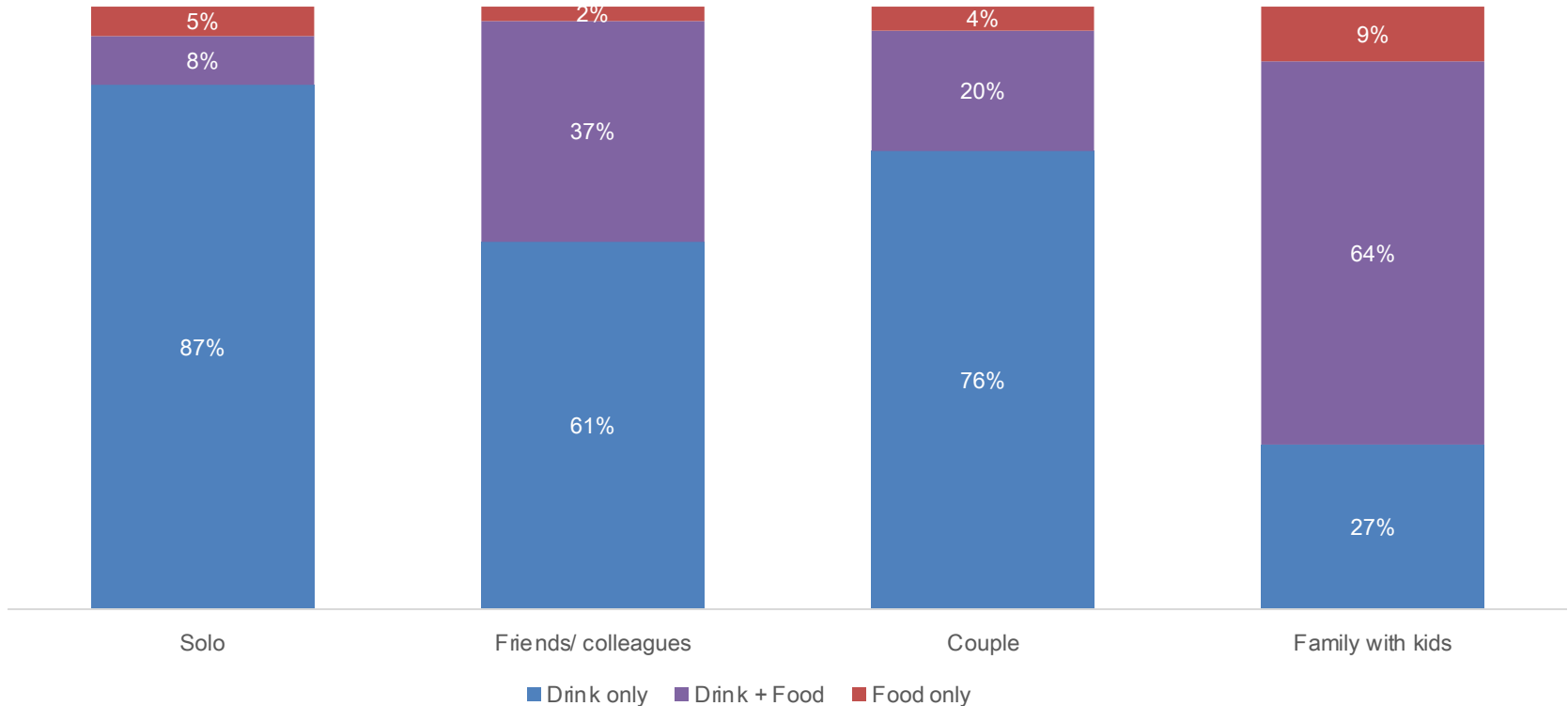




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Brands characteristics



Highest-value premium chain

Trung Nguyen Legend records the highest average spend per order (129,754 VND) and is more present in higher price bands, reinforcing its role as the most premium value-accretive chain in the set.



Premium but more balanced in basket structure

Starbucks combines high order value (109,813 VND) with a broader product mix, suggesting a premium chain that serves not only beverage occasions but also wider café usage missions.



Focused beverage-led chain

Katinat remains the most concentrated around drink-led orders and a relatively narrower basket structure, pointing to a clearer beverage-first positioning versus broader café missions.



Most basket-diverse mainstream chain

Phuc Long shows the broadest order structure among the mainstream chains, with the highest drink + food incidence (28%), suggesting a more complete café occasion than the more purely drink-led profiles of Katinat and Highlands.

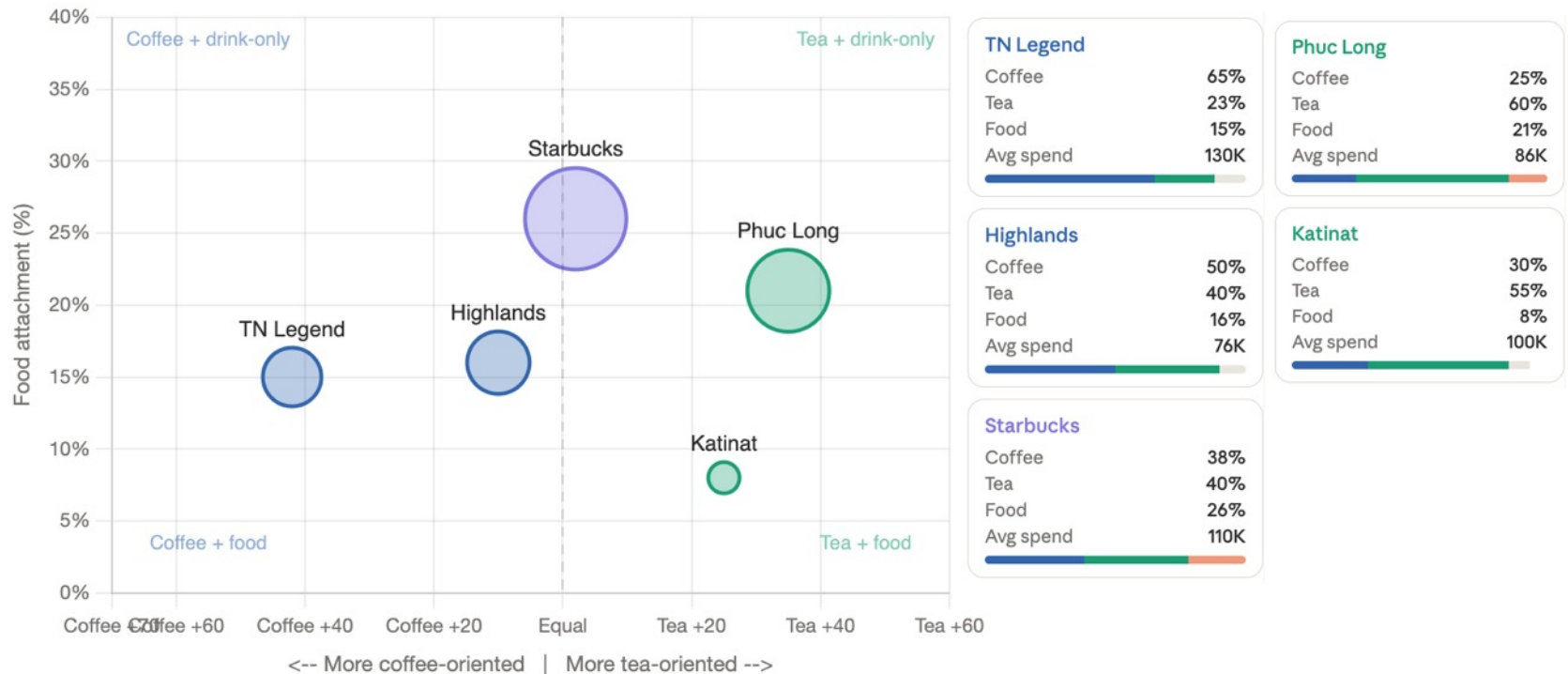


Mass accessibility chain

Highlands has the lowest average spend (76,075 VND) and is more concentrated in lower price bands, confirming its role as the most accessible, everyday chain among the five.

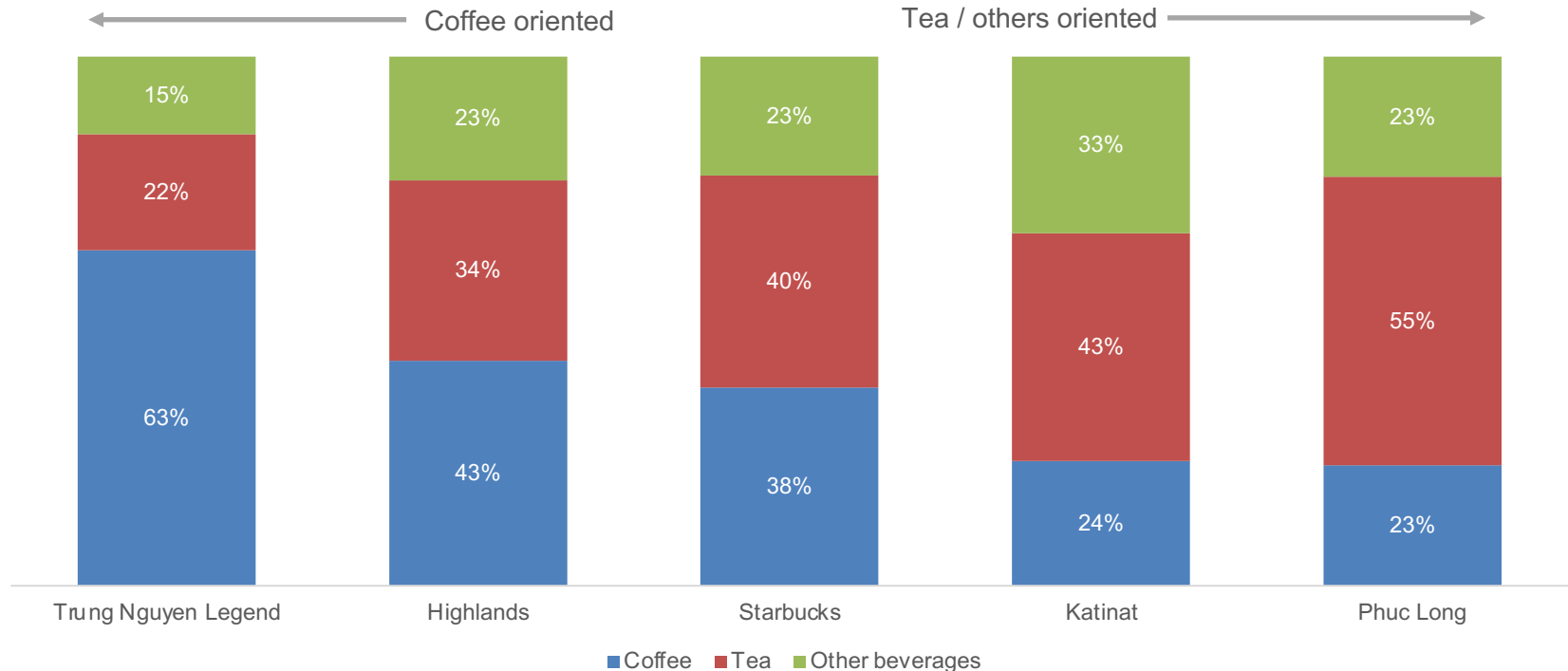
Brand positioning

Brands are clearly differentiated by coffee–tea orientation and food attachment, with Starbucks leading in premium, food-inclusive occasions, while Phuc Long and Katinat are more tea-focused.



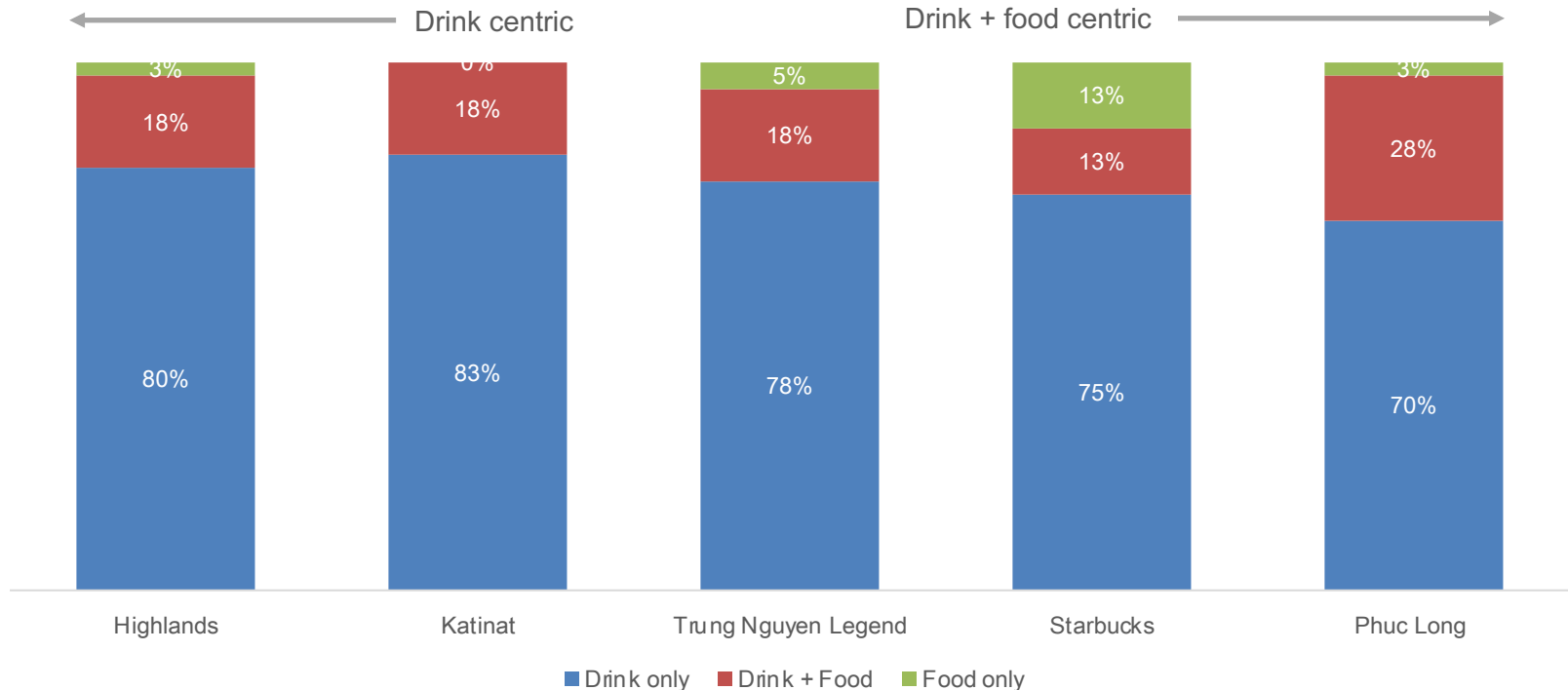
Drink type by brands

Coffee and tea shares vary significantly by brand, with Phuc Long and Katinat leaning toward tea, while Trung Nguyen and Highlands are more coffee-driven.



Order detail by brands

Across chains, orders are predominantly beverage-focused, while food plays a secondary role. Phúc Long shows the strongest food attachment, whereas Katinat is the most purely drink-led.



Average spend per order by brands

Adding food significantly increases order value (2–2.5x across brands), yet most visits remain drink-only, highlighting a clear opportunity to drive basket expansion.



Ave. (VND)	130,000	110,000	100,000	86,000	76,000
Drink only	110,000	105,000	86,000	76,000	61,000
Drink + Food	228,000	176,000	170,000	118,000	148,000
Food only	89,000	72,000		25,000	39,000

Order values by brands

Café chains show clear price-tier segmentation, with premium players (Trung Nguyên, Starbucks) capturing higher-value occasions, while mass chains (Highlands, Phúc Long, Katinat) are concentrated in lower price bands.

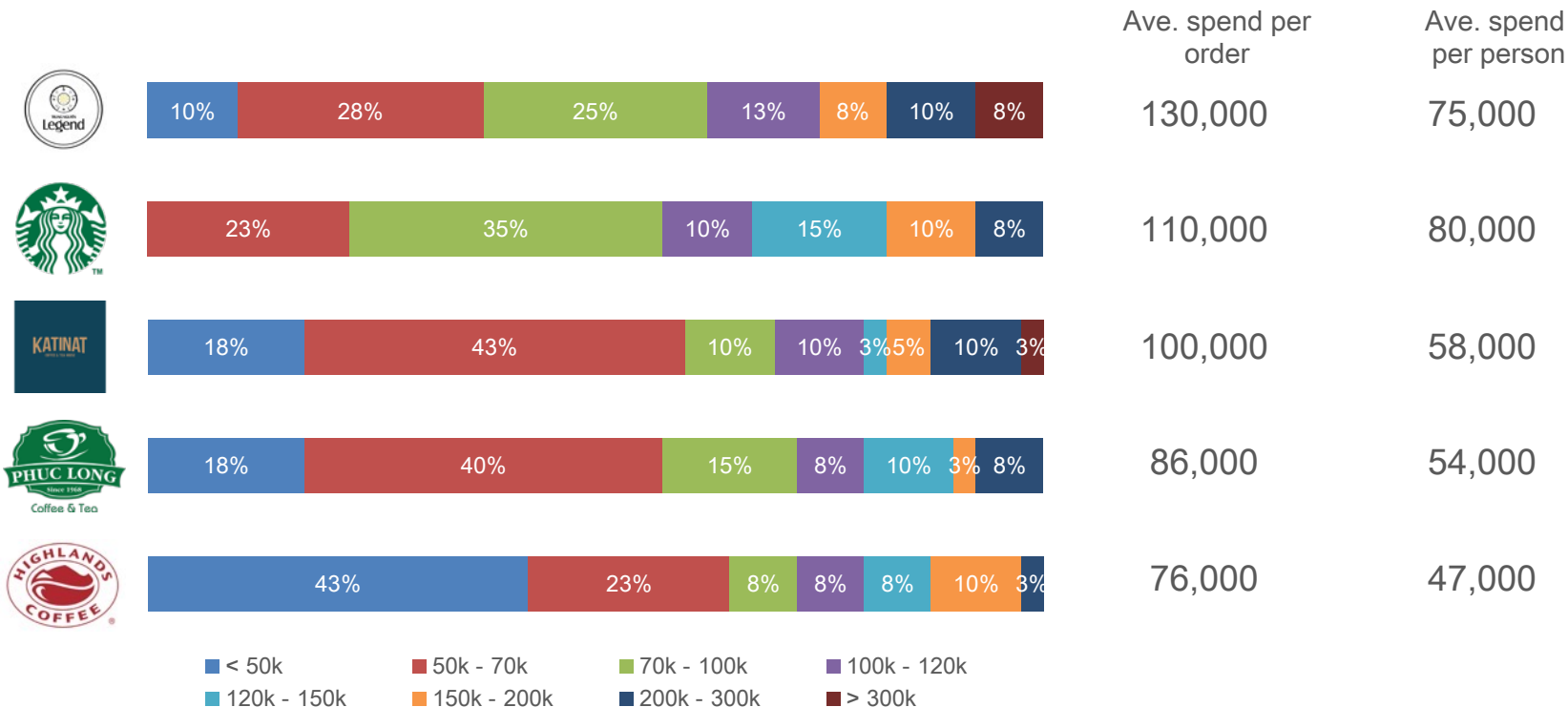


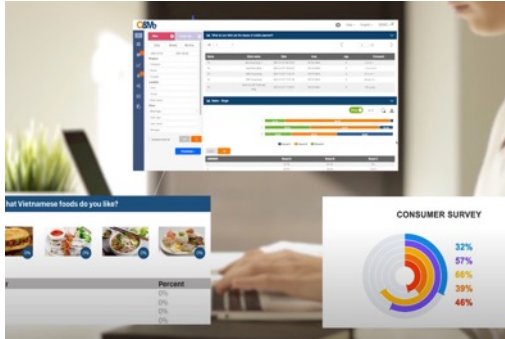


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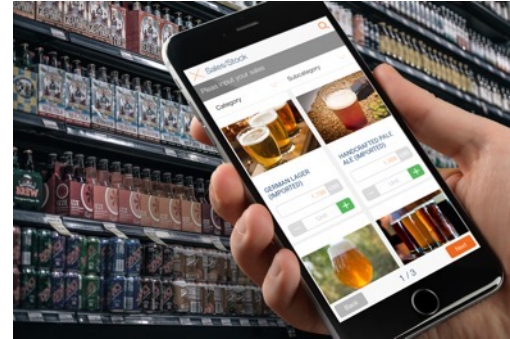
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About Asia Plus Inc.

Asia Plus Inc. provides the **marketing technology solutions** with the aim to help you **understand the market better** for the business growth. We are the specialist in data collection management and its analysis.



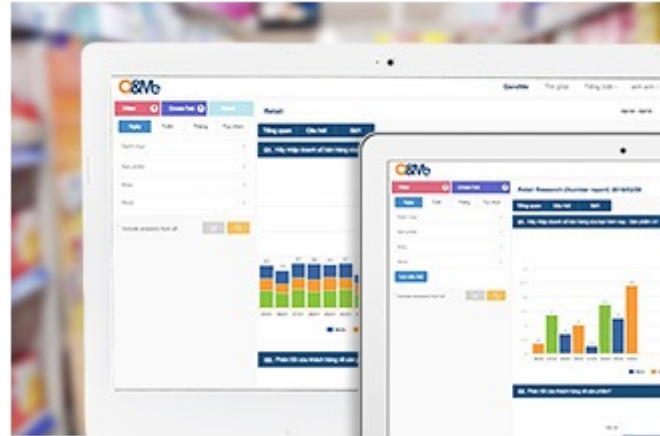
Technology-oriented market research services to better the market finding with speed and high quality



Field staff management SaaS to digitalize your field operation for better market understanding and the performance



Understand market better and easier



Key highlight - Who we are

Q&Me is the tech-oriented market research company

We manage all the projects of both online and offline **through one dedicated platform** to provide the valuable hints to your business promptly with high quality



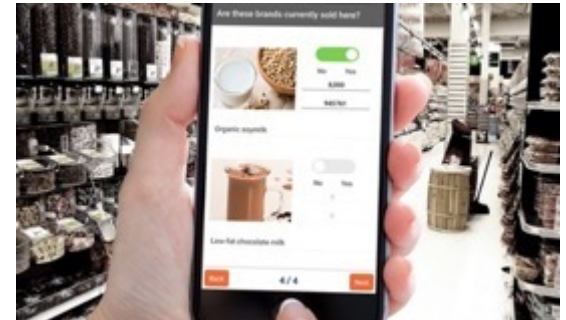
Q&Me is biggest online research service provider

We own **over 600,000 Vietnamese panelist with the variety of the profiles**. With the proprietary reward and quality scheme, we deliver the research results soonest



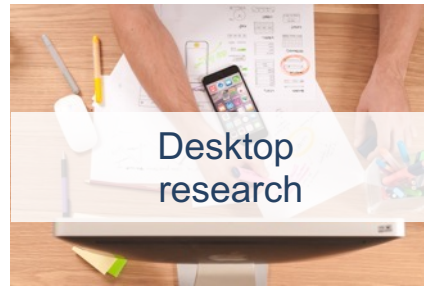
Proprietary research platform for superb quality

We have **300 well-trained fieldworkers nation-wide**, who are connected real-time through **our dedicated app**. All the tasks they conducts are monitored real-time with automation



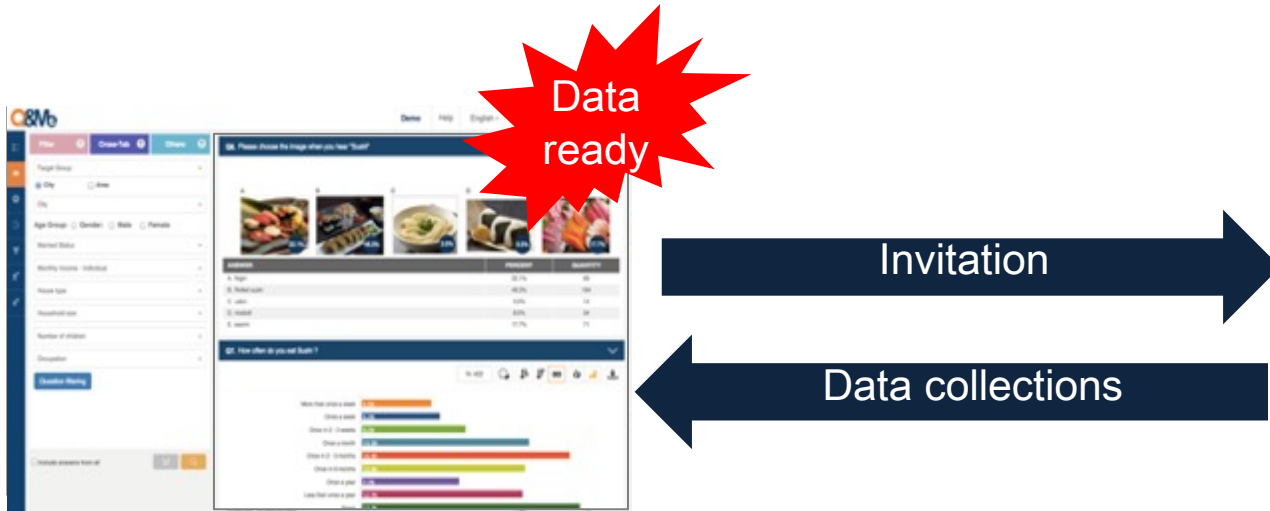
About our market research

We provide a variety of market research to provide actionable hints to maximize your business in Asia



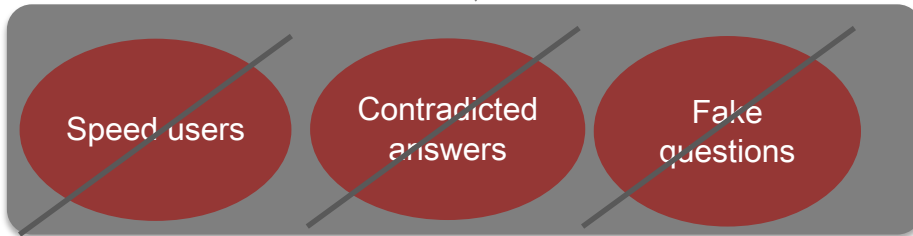
Online market research - Overview

We provide **quickest research service with quality** through our research platform, with proprietary data filtering techniques



Our members receive points by answering survey

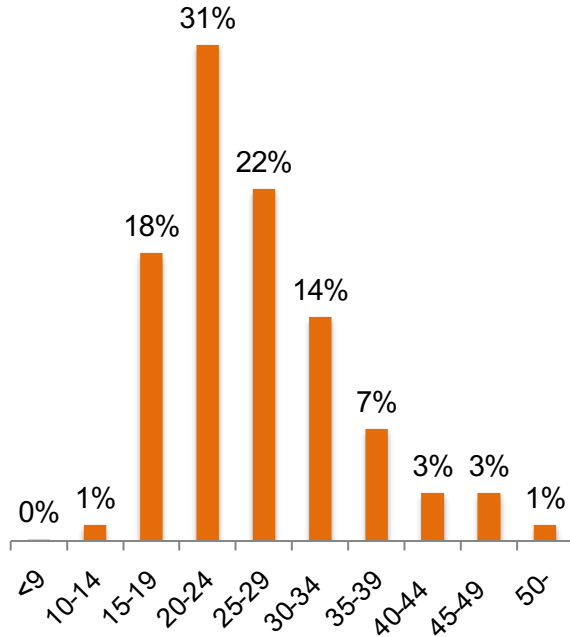
Bad answer filtering



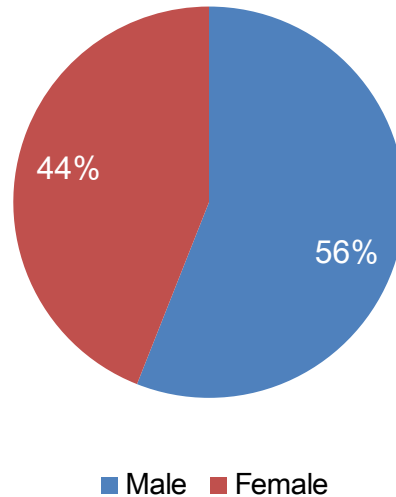
Online market research - Audience

We have **over 600,000 members** nation-wide who are eager to share their opinions. Our data provisions are quickest due to this **vast direct panel system**.

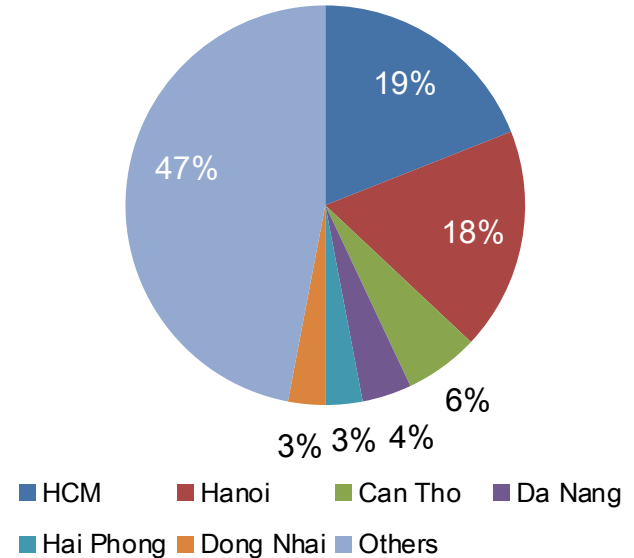
Age



Gender



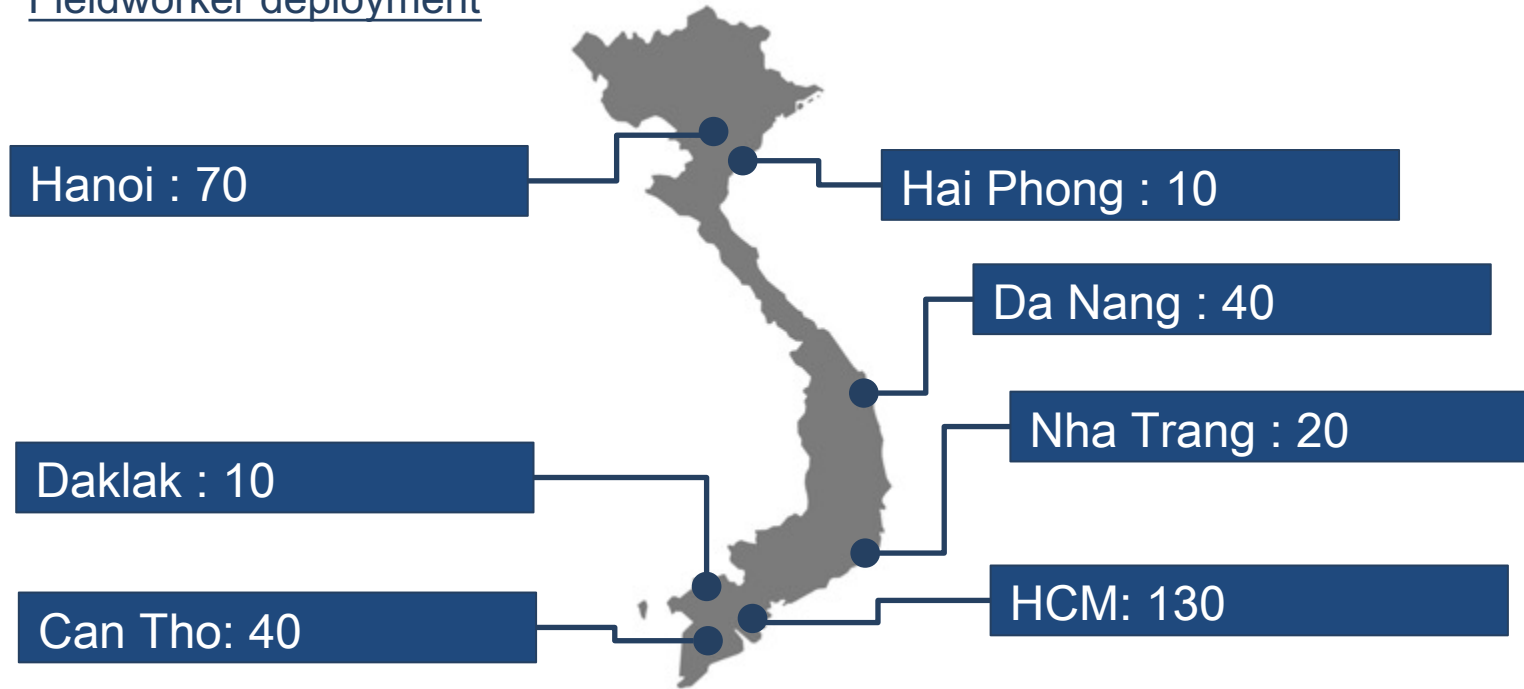
City



Offline market research - Coverage

More than **300 well-educated fieldworkers nation-wide** with the real-time connections via our dedicated mobile app for higher quality data collections

Fieldworker deployment



Offline market research - Technology

We manage our fieldworkers with **our own app**, for the **better and more efficient data collections**.



GPS control



Monitor the location and duration for the interview to watch whereabouts of the fieldworkers

Silence audio + Speech-to-text



Record the interview voice silently and reflect the conversation into text automatically

Real-time monitoring



Monitor the progress real-time per interviewers, quotas etc. to take the necessary action immediately

Qualitative research - In-depth interview / FGIs

Get the insight and the industry information from consumers and the industry expert. We **recruit whomever you would like to hear from** our proprietary database and fieldwork connections



Recruit the best candidate from 500K respondents, with a clear profile background and behaviors, supporting both of **B2B and B2C demands**

Experienced moderators and interviewers who are familiar with your industry to get the insight and comprehensive market understandings



High quality facilities nationwide to conduct the interviews with comfort. Full facilities even for the attendance **from remote via online**

Our customers

Food & Beverage



Beauty / Health



Electronics



Automotive



Consulting / agency



Finance



Technology



Retail



Housing / Real estate



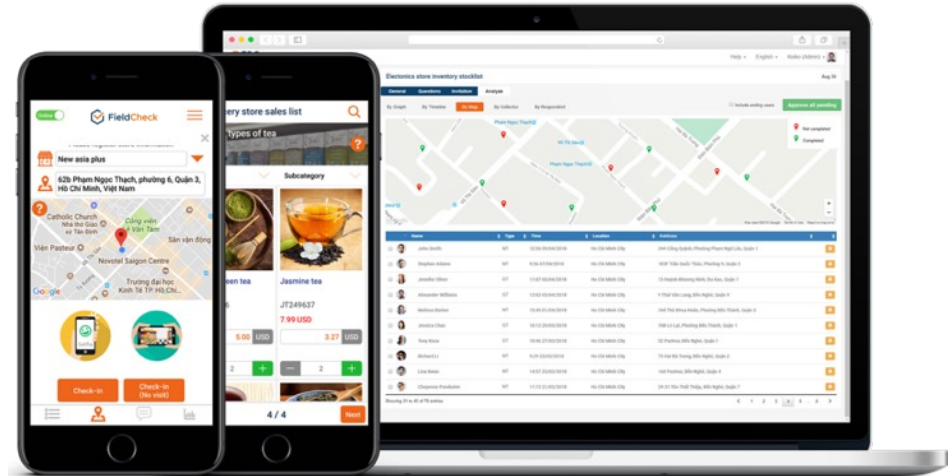
Others





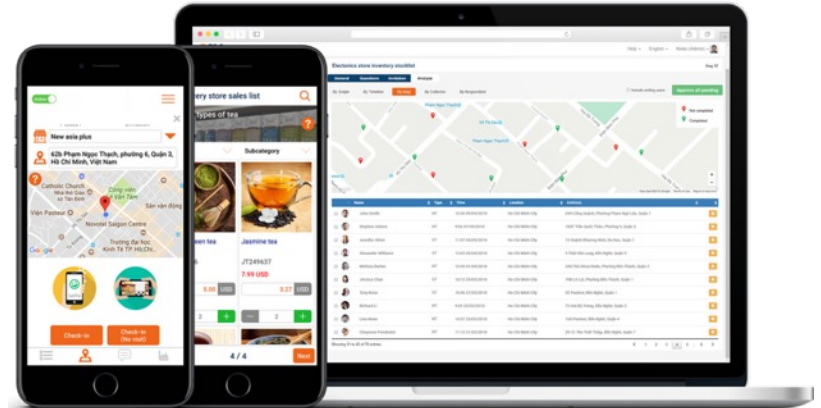
FieldCheck

Digitalize your fieldwork for better business



The world we create

Our solution was made for **all the fieldworkers** to renovate their operation for better performance. Innovate the field operation **from paper to paperless** to empower the fieldworkers



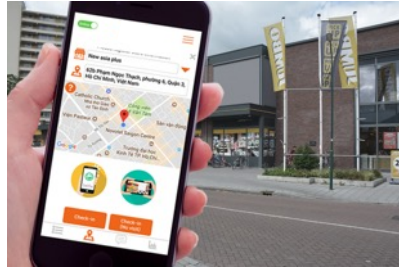
Our solution - A variety of templates

A **versatile template** to support your fieldwork with easy-to-configure admin tool. No code solution for your speedy and flexible business management.

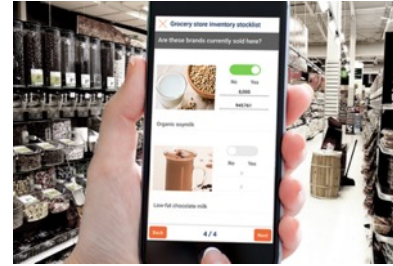
Sales / PO management



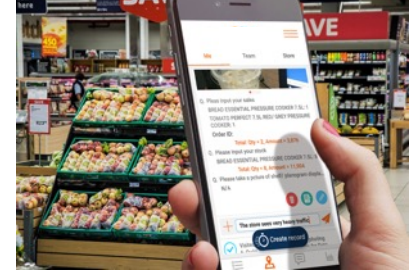
Location management



Retail audit



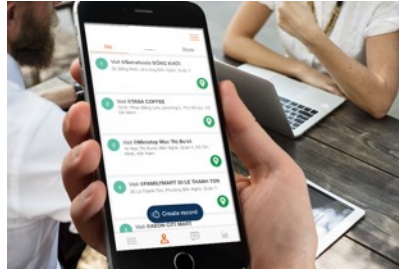
Merchandising management



Field report / incident report



Route management



Survey management



News / E-learning



Use case - SaaS service

Proven track record. Ready for the regional launch for the bigger pies.



- Order management from meat agents
- Order, inventory management via one app
- To manage 1,000 agents



- Regional promoter management tool to manage 3,000 promoters in all of SEA countries
- Promoter to share sales, incentive and other store display information



- As a promoter tool to collect the consumer data (via phone verification) in product purchase
- Collected data is used for their CRM activities



- As the tool for supervisor to manage the store quality
- Visit the store to deal with the store quality checklist for the quality evaluation as common KPI



- As the promoter tool to update the display status and the sales reporting of the respective stores



- For the visual merchandiser to check the status of their asset placement (store banner etc.)
- Staff visit the shop to report the status as well as new partner acquisition reporting



Q&Me is provided by Asia Plus Inc.

<https://qandme.net>

Contact us:

Tel: 02839 100 043

Email: info@qandme.net