Restaurants Overview
Over 4,000 restaurants are registered under the Yangon City Development Committee

- The City Development Committee grants business restaurant licenses.
- Over 2,000 restaurants in other cities are registered their respective City Development Committees.
- Operating restaurants in Yangon are registered in relevant restaurant association for potential business opportunities.
- In Yangon, the Myanmar Restaurant Association (MRA) represents 300 members and 200 members from other cities.

![MRA Membership Chart]

*Source: Myanmar Restaurant Association*
Chinese restaurants represent the highest share of the restaurant market

- Due to the cultural diversity and historical influences of neighbouring countries, the majority of restaurants in Yangon are Chinese restaurants, which is almost one third of the total restaurants, following Thai and Myanmar restaurants.
- In recent years, a number of foreign and European restaurants have entered the market, such as Mahlzeit and others.
- Almost half of the restaurants in Yangon are mid-range price level restaurants.

### Cuisine Breakdown

- Chinese: 29%
- Thai: 15%
- Japanese: 8%
- Indian: 2%
- Western: 4%
- Fried Chicken: 3%
- BBQ: 3%
- Café: 5%
- Asian food (Malaysia, Vietnam, ...): 11%
- Others: 16%

*Source: Myanmar Restaurant Association*
More foreign business restauranteurs have entered the market in recent years

- Only about 8% of restaurants in Yangon are foreign owned.
- The vast number of local owned restaurants are mainly Chinese, Myanmar and Thai restaurants.
- The minority of foreign restaurants open European restaurants, Korea and India restaurants, according to the statistics from Myanmar Restaurant Association.

**Restaurant Ownership**

- Locally owned
- Foreign owned

**Type of foods opened by local owners**

- Myanmar Food: 21%
- Thai Food: 27%
- Chinese: 52%

*Source: Myanmar Restaurant Association*
• There is no formal mechanism for tracking restaurants closures.
• According to the MRA, about 7% of their members have ceased operations in 2016.
• Interviews with restaurant owners revealed that major causes of closed restaurants can be attributed to increased rental cost and poor management oversight.
Customers - Dining Out Trends Survey
Tractus Asia conducted a mini survey to provide insight into Yangon’s dining out trends

• We surveyed over 130 diners in Yangon to understand their dining out preferences.

• We asked about common dining out, such spending per visit, frequency for dining out, food preferences, and how they pick their restaurants.

• Some questions allowed for more than one choice.

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<th>Demographic highlights</th>
<th>Nearly half the sample size are aged 21-39</th>
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<td>Spending habits</td>
<td>Forty percent of responders (majority of sample) spend SGD 6–10 on food when dining out.</td>
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<td>Dining out frequency per week</td>
<td>Slightly over half the respondents, 54%, eat out 1-3 times per week.</td>
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<td>Food chosen</td>
<td>The majority of people choose Myanmar, Chinese, and Thai food. (respondents could select multiple cuisines).</td>
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<td>How are restaurants chosen</td>
<td>Major decision factors include quality of food and location when deciding on a restaurant location. (respondents could select multiple cuisines)</td>
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Note: Results are based on a small sample pool of respondents, and should be not used as conclusive, or to determine investment decisions.
Respondents are split almost evenly between genders

Are you male or female?

Female 48%
Male 52%
Almost half of the respondents are aged 21-29, with 30-39 age group closely behind.

What is your age?

- 60 or older: 1%
- 50-59: 2%
- 40-49: 7%
- 30-39: 41%
- 21-29: 47%
- 18-20: 1%
- 17 or younger: 1%
Nearly half of respondents earn between SGD 501 and 2,000

What is your monthly income?

- Less than SGD 500: 20%
- SGD 501 - 1,000: 24%
- SGD 1,001 - 2,000: 23%
- SGD 2,001 - 5,000: 19%
- SGD 5,001 - 10,000: 10%
- SGD 10,001 and above: 4%

Note: Assumes 1 SGD = 1,000 MMK
Few respondents spend above SGD 51 and when dining out

How much do you typically spend on food when you eat out (per time eating out)?

- SGD 101 and above: 3%
- SGD 51 - 100: 2%
- SGD 11 - 50: 34%
- SGD 6 - 10: 40%
- Less than SGD 5: 21%

Note: Assumed 1 SGD = 1,000 MMK
The majority of people regularly eat out 1-3 times per week

How many times do you eat out per week?

- 5 and above: 15%
- 3 - 5: 20%
- 1 - 3: 54%
- Less than 1: 11%
Myanmar, Chinese, and Thai foods are the preferred choices

What type of food do you usually prefer?

- Others: 4%
- Japanese food: 11%
- Korean food: 7%
- Western food: 13%
- Thai food: 19%
- Chinese food: 22%
- Myanmar food: 24%

*Respondents can select more than one answer*
Most of the respondents usually eat out with friends

Do you usually eat out alone or with others?

- With friends: 35%
- With family: 25%
- With colleagues: 13%
- With boyfriend/girlfriend: 13%
- Alone: 13%
- Others: 1%

*Respondents can select more than one answer*
The quality of food usually impacts diners' choice when selecting a restaurant.

How do you choose the restaurant when you eat out?

- **Others**: 2%
- **To study/work**: 4%
- **Brand (e.g. KFC)**: 5%
- **Trying out new restaurants**: 13%
- **Price of food**: 19%
- **Quality of food**: 34%
- **Location (accessibility)**: 23%

*Respondents can select more than one answer.*
Most respondents prefer to dine out in the evening

What time do you usually eat out?

- Late Night (Bar): 13%
- Evening (Dinner): 55%
- Afternoon (Lunch): 20%
- Morning (Breakfast): 13%

*Respondents can select more than one answer*
Respondents prefer a mix of restaurants (3-5) when they eat out

Do you usually eat at the same restaurant or go to different restaurants when you eat out?

- I usually go to different restaurants: 14%
- I have a mix of restaurants (3-5) that I usually go to: 72%
- I usually eat at the same restaurant: 14%
Target group – Age 21-39
Respondents in targeted age group earning SGD 501-1,000/month, spend on average SGD 6-10 when dining out.

Note: Assumed 1 SGD = 1,000 MMK
Myanmar, Chinese, and Thai food remain popular in selected age group

Myanmar food
Chinese food
Thai food
Western food
Korean food
Japanese food
Others

Cuisine preference

Male (Age between 21 - 39)
Female (Age between 21 - 39)
The target group select restaurants based on food quality.

Restaurant Selection Criteria

- Location (accessibility)
- Quality of food
- Price of food
- Trying out new restaurants (following the trend)
- Brand (e.g. KFC)
- To study/work and stay for more than 2 hours (e.g. Café)
- Others

- Male (Age between 21 - 39)
- Female (Age between 21 - 39)
Thank you