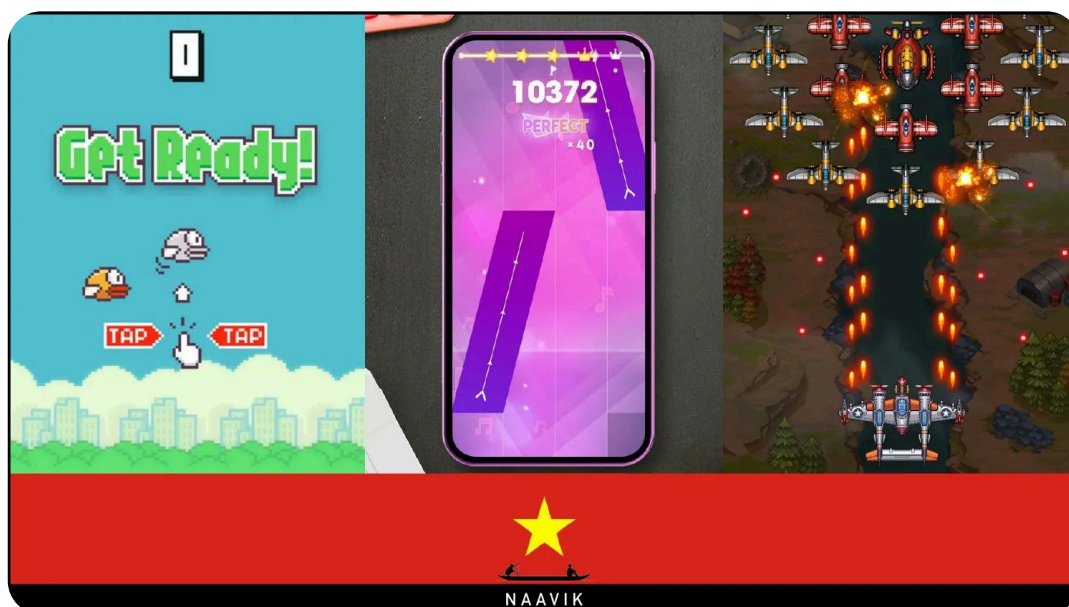# Vietnam's Mobile Dev Opportunity

By Harshal Karvande • May 4, 2025

Source: Naavik

Vietnam, the Southeast Asian nation once defined by manufacturing and outsourcing, is now a vibrant digital innovator — and mobile games are leading that movement. It has a thriving game development scene, with over 35K game programmers, a figure close to that of China, according to Emily Nguyen, Head of Sales for Google Ads, Gaming and Apps in Vietnam.
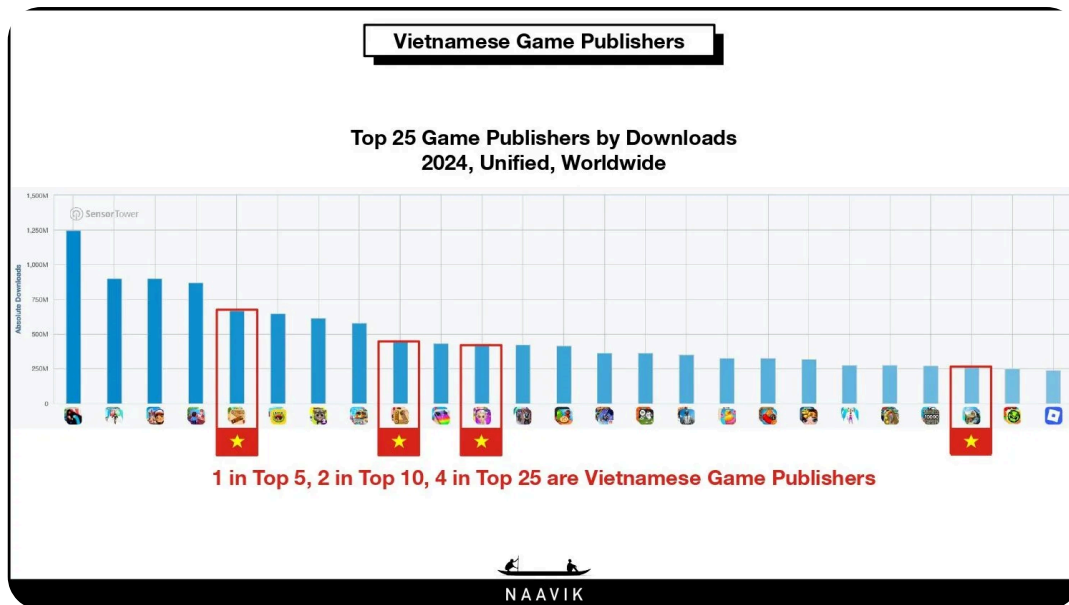
Source: Sensor Tower, Naavik

In 2024, there were five Vietnamese companies in the top 25 publishers by downloads: VNGGames, iKame Games, ABI Games Studio, Bravestars Games, and Xgame Global. Their presence was driven by games like Car Race (iKame), Wood Nuts & Bolts Puzzle (ABI), and Hair Salon: Beauty Salon Game (Bravestars). Here, we uncover the forces behind Vietnam's mobile game development scene and its potential impact on the wider industry.

From Internet Cafes to Mobile Phones
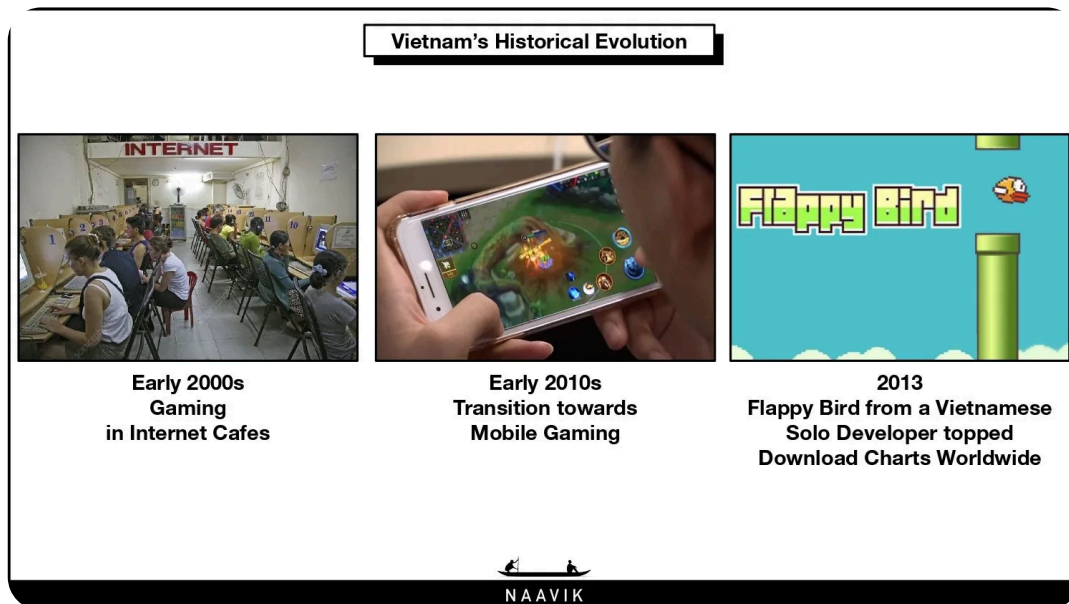
Source: Naavik

Vietnam's engagement with digital entertainment began in the early 2000s, with PC gaming establishing itself as a pastime in bustling internet cafés. Vietnam's role was predominantly that of a consumer, rather than a producer, of games, with most titles imported from China, South Korea, and Western countries. Notable games at the time were League of Legends, Counter Strike, and Võ Lâm Truyền Kỳ (The Swordman).

The success of these online social games laid a foundation for a generation of tech-savvy gamers, but high-profile crimes linked to gaming led to strict government regulations, with Deputy Minister for Culture and Information Do Huy Doan saying, "Playing games online for too long will affect gamers' health, even cause death."

Given this backdrop, how did Vietnam manage to evolve from a consumer to a successful producer of games? The transformation flowed from three converging forces: a long history of outsourcing, government regulation, and the explosive rise of mobile gaming.

Outsourcing

Outsourcing has a long history in Vietnam, with outfits like Glass Egg (established in 1999, acquired by Virtuos in 2022), Sparx (founded in 1995, acquired by Virtuos in 2011), and Gear Games (formed in 2006) representing some of the oldest external development shops. Foreign companies like Ubisoft and Gameloft have also set up shop in Vietnam.

Through these outfits, thousands of game developers have cut their teeth across the entire development pipeline, from art and engineering to QA and live ops. (Virtuos alone has more than 1,000 employees in Vietnam.) Decades of work on everything from AAA blockbusters to mobile hits have produced a large, highly skilled talent pool, ripe for powering Vietnam's shift from a reliable outsourcing hub to a new force in original IP creation.n.

Rules Make The Market

Before the 2000s, there was no gaming regulation in Vietnam, but the public outcry during the "online gaming crisis" began a trend of government regulation that would change the landscape of the Vietnamese game industry.

In short, local game makers had to seek government approval and licenses to sell and run games in the country, and were banned from advertising their work. Fines and other punishments were introduced for noncompliance, and new restrictions were being added up to and including last year.

Foreign game publishers had three choices if they wanted to release games in Vietnam: work with a local publisher to distribute games, establish a local entity, or give up entirely — Supercell famously pulled out from Vietnam due to regulations in 2019.
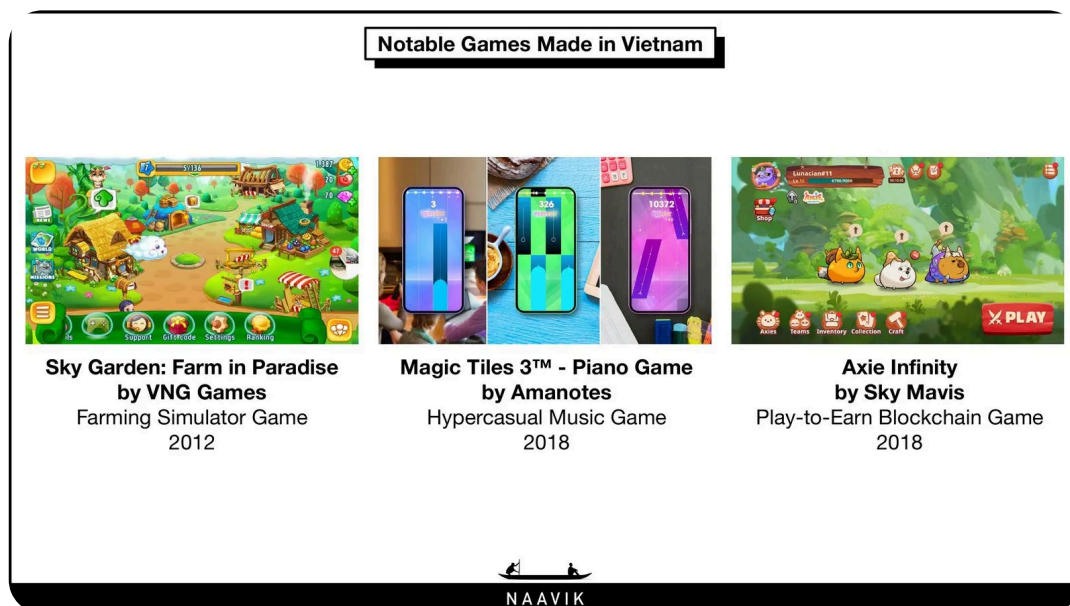
The rules requiring a local entity resulted in a proliferation of Vietnamese firms that would publish foreign games in the market, an easier choice compared to setting up a local entity. A chief player in that space is VNG Corporation, founded in 2004. Recognised as Vietnam's first tech unicorn, it holds the top spot for mobile game publishing, messaging applications, music streaming, and online news platforms in Vietnam. VNGGames is the number one mobile game publisher in Vietnam by market share, publishing the likes of Roblox, PUBG Mobile VN, Call of Duty: Mobile VN, and Teamfight Tactics.

Local companies would gain insight from publishing these foreign titles, arming themselves with knowledge on how to launch and operate successful games. This, combined with the development know-how from outsourcing, made the soil fertile for homegrown success. It only needed a seed.

The Mobile Explosion

That seed was the emerging mobile gaming space. The watershed moment came in 2013 with the unexpected success of Flappy Bird, created by Vietnamese solo developer Nguyen Ha Dong. It topped charts worldwide, achieving a peak in advertising revenue estimated at up to $50K per day. Its creator eventually removed it from app stores, but Flappy Bird demonstrated that Vietnamese developers could create globally successful mobile games with limited resources, inspiring a generation of local developers.

In Flappy Bird's wake, Vietnam saw an explosion of small mobile studios and startups, and teams that cut their teeth on outsourcing or publishing began creating their own IP. Vietnamese games like Sky Garden: Farming Paradise, Magic Tiles 3, and Axie Infinity gained millions of players and global recognition. According to Sensor Tower, there are currently more than 300 active mobile game publishers with their HQ in Vietnam.

Notable Games Made in Vietnam

Sky Garden: Farm in Paradise
by VNG Games
Farming Simulator Game
2012

Magic Tiles 3™ - Piano Game
by Amanotes
Hypercasual Music Game
2018

Axie Infinity
by Sky Mavis
Play-to-Earn Blockchain Game
2018

NAAVIK

Source: Naavik

Another example of a local publisher/outsourcer turned standout developer is Bill Truong, CEO of Suga Group. He started as a developer at VNG before founding Suga which, under its subsidiary Farm Studios, has published games like Prison Break: Stick Story, which now has over 100M downloads on Android alone.

Additional Factors To Success

Vietnam also has other advantages:

- **Technological readiness:** Vietnam has achieved over 84% smartphone penetration, with 4G coverage reaching 99.8% of the population.

- **Demographic advantage:** With a population of approximately 100M people and a median age of just 32.5 years, Vietnam possesses a large, young, and increasingly digitally native population.
- **A culture of agility and rapid iteration:** Vietnamese game developers, particularly in the hypercasual and early mobile spaces, developed a reputation for being agile and quick to adapt to market trends. This allowed them to capitalize on emerging genres and quickly iterate on gameplay based on user feedback, a crucial advantage in the fast-paced mobile market.

The 2024 performance of Vietnam's top 10 publishers underscores the nation's booming mobile game scene, with nearly 2.4B downloads representing a 67% increase since 2020, and $133M in revenue showcasing an even stronger 82% growth over the same period.
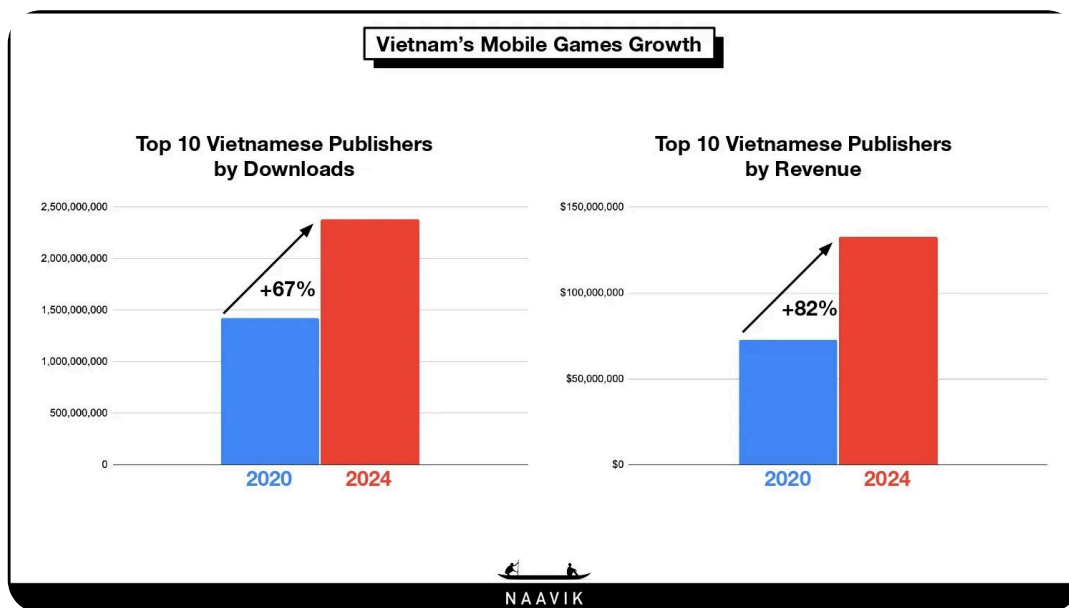
Source: *Sensor Tower, Naavik*

## Looking Forward
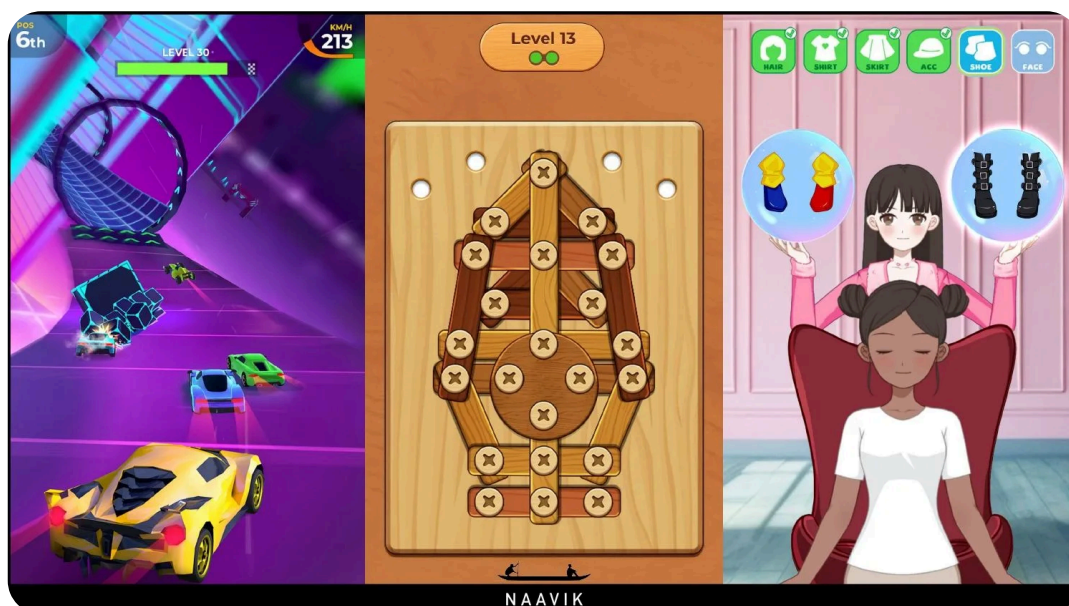
Source: *Naavik*

Vietnam's potential to establish itself as a global hub for mobile game development depends on how effectively it addresses its limitations while leveraging its advantages.

Vietnam's regulatory framework is imposing stricter limits on online gaming time for minors to combat game addiction and its negative impacts, while also further restricting social, online games — exactly the type that make mobile games top grossing lists. The approval process for games can be lengthy and unpredictable too, with all titles requiring appraisal from the Ministry of Information and Communications. These content restrictions and censorship requirements can limit creative expression and make it difficult to create games that appeal to both domestic and international audiences.

Given Vietnam's strength in hypercasual and hybrid genres, its future success will depend on its ability to navigate the market's ongoing shift from hypercasual toward more complex casual game models (as we've covered previously). This necessitates an even more significant pivot toward online, social mobile games, a challenge made even harder by the country's regulations pushing in the opposite direction.

Vietnamese game development currently holds a strong intermediate position globally, surpassing many emerging markets but still striving for true global hub status. Despite ongoing challenges, its established base and current growth suggest a positive trajectory, supported by more foreign investment into Vietnam. The next decade will be key in determining if Vietnam can fully leverage its strengths to become a leader in mobile game development, contributing its unique voice to the global stage.

A Word from Our Sponsor: OVERWOLF
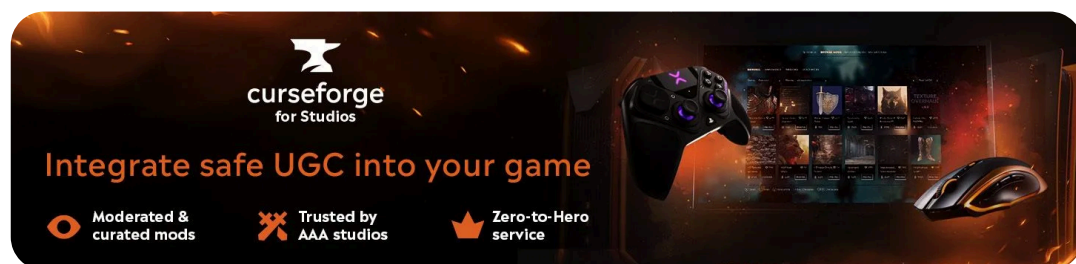
Overwolf is an all-in-one platform that lets creators build, share, and monetize in-game apps, mods, and private servers. With over 178K creators and 100M monthly active users, Overwolf supports the world's most popular AAA titles such as League of Legends, Minecraft, World of Warcraft, and 1,500 other games.

For game developers, Overwolf offers CurseForge For Studios. CurseForge For Studios is a white-label solution that lets game makers and publishers easily integrate mods safely and seamlessly into their games, both existing and new, at zero cost. It's battle-tested by AAA studios and games, including Krafton (inZOI), Studio Wildcard (ARK), Take-Two Interactive (Kerbal Space Program), and others.

CurseForge For Studios offers:

- Cross-Platform Modding: Integrate Overwolf's open-source SDK and plugins to let players discover and install mods in-game, across all platforms and storefronts.

- Moderation to Ensure Safety: Studios define policies and guidelines on what is permitted, with Overwolf ensuring that only authorized and appropriate content is published.

- Creator Relations and Payments: CurseForge supports creators with monthly payments, equity investments, developer contests, and hackathons to kickstart content creation for your game.

- Harness Existing Creator Community: Tap into the creative expertise and knowledge of a passionate community of 178K creators.

- Premium Mods Integration: Crafted by game studios and select community modders, Premium Mods offer players a next-level modding experience through guaranteed high-quality content, while offering creators a powerful new revenue stream.

Learn More

In Other News

💸 Funding & Acquisitions:

- IXI raises $36.5M for world's first autofocus glasses
- True Gamers secures $5M to expand across MENA and Europe
- Dream Games secures strategic investment from CVC as sole equity partner

📊 Business & Products:

- Monster Strike surpasses $11B in 11 years with Japanese dominance
- Krafton reports record Q1 2025 revenue of $608M
- Elden Ring tops 30M sales worldwide
- The Elder Scrolls 4: Oblivion Remastered reaches 4M players
- Clair Obscur: Expedition 33 sells 1M copies in three days

👾 Miscellaneous:

- Microsoft was top publisher on Xbox and PS stores during Q3
- How GeeMee reshapes mobile app Monetisation with AI technology
- Apple can no longer collect fees on purchases made outside the App Store in the US, court rules