



Cafés/Bars in China

April 2026

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2025 DEVELOPMENTS

Current value growth dips as consumers curb discretionary spending

INDUSTRY PERFORMANCE

Specialist coffee and tea shops shows fastest development in value terms

Consolidation accelerates in specialist coffee and tea shops

Average spend per transaction continues to fall

WHAT'S NEXT?

Saturation and polarisation will temper growth potential

Delivery services set to gain importance in specialist coffee and tea shops

Frequent innovation will be necessary for chains to maintain consumer interest

COMPETITIVE LANDSCAPE

Luckin Coffee (Beijing) Co Ltd remains the outright leader

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Consumer Foodservice in China - Industry Overview

EXECUTIVE SUMMARY

Trade remains resilient despite market-wide slowdown

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INDUSTRY PERFORMANCE

Average spend per foodservice transaction shrinks in 2025

Delivery is the fastest growing fulfilment channel

Subscription-style loyalty programmes gain popularity

WHAT'S NEXT?

Value-seeking consumer behaviour will bring greater consolidation and polarisation

Regional cuisine, localisation and healthier choices will be key areas for innovation

Sustainability credentials set to become a more important point of competition

COMPETITIVE LANDSCAPE

Yum! Restaurants China Co Ltd retains overall market lead in value terms

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