



Consumer Foodservice By Location in China

April 2026

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KEY DATA FINDINGS

2025 DEVELOPMENTS

Rental costs ease but competition for high-traffic locations intensifies

INDUSTRY PERFORMANCE

Consumer foodservice through retail grows fastest in value terms

Consumer foodservice through standalone remains the dominant category

WHAT'S NEXT?

Leisure category projected to be the most dynamic performer

Neighbourhood stores and university towns will be key retail growth drivers

Travel category set to benefit from heavy investment in transport infrastructure

COMPETITIVE LANDSCAPE

Limited-service restaurants players remain strong in non-standalone locations

Mixue and Luckin Coffee among the top brands in standalone locations

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[Consumer Foodservice in China - Industry Overview](#)

EXECUTIVE SUMMARY

Trade remains resilient despite market-wide slowdown

KEY DATA FINDINGS

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
Ye Gelato is the most dynamic foodservice brand in 2025
Chained players increasingly focused on expansion into low-tier cities

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