



Euromonitor
International

Consumer Foodservice in China

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Consumer Foodservice in China

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

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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

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INDUSTRY PERFORMANCE

Growth in outlet numbers slows as independents and chains show greater caution

European full-service restaurants is the fastest developing category

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WHAT'S NEXT?

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WHAT'S NEXT?

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Self-Service Cafeterias in China

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Heightened budget-consciousness favours self-service cafeterias

INDUSTRY PERFORMANCE

Pay-by-weight model proves increasingly popular

Regional cuisine types are a key area for menu diversification

Interest in vegetarian establishments remains strong

WHAT'S NEXT?

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Influence of “wok hei” revival set to become more visible

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INDUSTRY PERFORMANCE

Drinks continue to generate lion's share of total value sales

Delivery platform price war fuels growth of street stalls/kiosks

More operators extend opening hours and embrace 24/7 models

WHAT'S NEXT?

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Easing of delivery price war likely to contribute to greater consolidation

Tea specialists will continue to expand their coffee menus

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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

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