Euromonitor International

Consumer Foodservice in China

April 2026

Table of Contents

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

CHANNELS

Independents continue to lose ground to chained operators

MARKET DATA

Table 1 - Units, Transactions and Value Sales in Consumer Foodservice 2020-2025
Table 2 - Units, Transactions and Value Sales in Consumer Foodservice: % Growth 2020-2025
Table 3 - Consumer Foodservice by Independent vs Chained by Type: Units/Outlets 2025
Table 4 - Consumer Foodservice by Independent vs Chained: % Foodservice Value 2020-2025
Table 5 - Sales in Consumer Foodservice by Food vs Drink Split: % Foodservice Value 2020-2025
Table 6 - Sales in Consumer Foodservice by Food vs Drink Split by Type: % Foodservice Value 2025
Table 7 - Sales in Consumer Foodservice by Location: % Foodservice Value 2020-2025
Table 8 - Sales in Consumer Foodservice by Fulfillment: % Foodservice Value 2020-2025
Table 9 - GBO Company Shares in Chained Consumer Foodservice: % Foodservice Value 2021-2025
Table 10 - GBN Brand Shares in Chained Consumer Foodservice: % Foodservice Value 2022-2025
Table 11 - GBN Brand Shares in Chained Consumer Foodservice: Units/Outlets 2025
Table 12 - Forecast Units, Transactions and Value Sales in Consumer Foodservice 2025-2030
Table 13 - Forecast Units, Transactions and Value Sales in Consumer Foodservice: % Growth 2025-2030

DISCLAIMER

SOURCES

Summary 1 - Research Sources

Cafés/Bars in China

KEY DATA FINDINGS

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
Manner Coffee continues to rank among the fastest growing brands
Independents face biggest threat from chains in specialist coffee and tea shops

CATEGORY DATA

Table 14 - Cafés/Bars by Category: Units/Outlets 2020-2025
Table 15 - Sales in Cafés/Bars by Category: Number of Transactions 2020-2025
Table 16 - Sales in Cafés/Bars by Category: Foodservice Value 2020-2025
Table 17 - Cafés/Bars by Category: % Units/Outlets Growth 2020-2025
Table 18 - Sales in Cafés/Bars by Category: % Transaction Growth 2020-2025
Table 19 - Sales in Cafés/Bars by Category: % Foodservice Value Growth 2020-2025
Table 20 - GBO Company Shares in Chained Cafés/Bars: % Foodservice Value 2021-2025
Table 21 - GBN Brand Shares in Chained Cafés/Bars: % Foodservice Value 2022-2025
Table 22 - Forecast Cafés/Bars by Category: Units/Outlets 2025-2030
Table 23 - Forecast Sales in Cafés/Bars by Category: Number of Transactions 2025-2030
Table 24 - Forecast Sales in Cafés/Bars by Category: Foodservice Value 2025-2030
Table 25 - Forecast Cafés/Bars by Category: % Units/Outlets Growth 2025-2030
Table 26 - Forecast Sales in Cafés/Bars by Category: % Transaction Growth 2025-2030
Table 27 - Forecast Sales in Cafés/Bars by Category: % Foodservice Value Growth 2025-2030

DISCLAIMER

Full-Service Restaurants in China

KEY DATA FINDINGS

2025 DEVELOPMENTS

Average spend per transaction falls but trade remains resilient overall

INDUSTRY PERFORMANCE

Growth in outlet numbers slows as independents and chains show greater caution
European full-service restaurants is the fastest developing category
Consumer choices increasingly shaped by value-for-money considerations

WHAT'S NEXT?

Regional cuisine types and speciality dishes set to become more widely available
Delivery will continue to gain importance as a fulfilment channel
Lower-tier cities will remain key frontiers for expansion of chains

COMPETITIVE LANDSCAPE

Leading chain Hai Di Lao Hot Pot suffers value sales decline
Xi Bei furore highlights tension between demands for authenticity and affordability
Independents continue to dominate full-service restaurants

CATEGORY DATA

Table 28 - Full-Service Restaurants by Category: Units/Outlets 2020-2025
Table 29 - Sales in Full-Service Restaurants by Category: Number of Transactions 2020-2025

Table 30 - Sales in Full-Service Restaurants by Category: Foodservice Value 2020-2025
Table 31 - Full-Service Restaurants by Category: % Units/Outlets Growth 2020-2025
Table 32 - Sales in Full-Service Restaurants by Category: % Transaction Growth 2020-2025
Table 33 - Sales in Full-Service Restaurants by Category: % Foodservice Value Growth 2020-2025
Table 34 - GBO Company Shares in Chained Full-Service Restaurants: % Foodservice Value 2021-2025
Table 35 - GBN Brand Shares in Chained Full-Service Restaurants: % Foodservice Value 2022-2025
Table 36 - Forecast Full-Service Restaurants by Category: Units/Outlets 2025-2030
Table 37 - Forecast Sales in Full-Service Restaurants by Category: Number of Transactions 2025-2030
Table 38 - Forecast Sales in Full-Service Restaurants by Category: Foodservice Value 2025-2030
Table 39 - Forecast Full-Service Restaurants by Category: % Units/Outlets Growth 2025-2030
Table 40 - Forecast Sales in Full-Service Restaurants by Category: % Transaction Growth 2025-2030
Table 41 - Forecast Sales in Full-Service Restaurants by Category: % Foodservice Value Growth 2025-2030

DISCLAIMER

Limited-Service Restaurants in China

KEY DATA FINDINGS

2025 DEVELOPMENTS

Trade remains robust despite increased budget-consciousness among consumers

INDUSTRY PERFORMANCE

Asian limited-service restaurants still the dominant category
Ice cream limited-service restaurants is the most dynamic performer
Delivery continues to gain ground at expense of eat-in channel

WHAT'S NEXT?

Affordability and convenience factors will continue to underpin steady demand
Delivery set to become the top fulfilment channel by value
Localisation will remain a vital strategy for international chains

COMPETITIVE LANDSCAPE

Yum! Restaurants retains overall lead in value terms
Ye Gelato is the fastest growing brand in 2025
Independents continue to lose ground

CATEGORY DATA

Table 42 - Limited-Service Restaurants by Category: Units/Outlets 2020-2025
Table 43 - Sales in Limited-Service Restaurants by Category: Number of Transactions 2020-2025
Table 44 - Sales in Limited-Service Restaurants by Category: Foodservice Value 2020-2025
Table 45 - Limited-Service Restaurants by Category: % Units/Outlets Growth 2020-2025
Table 46 - Sales in Limited-Service Restaurants by Category: % Transaction Growth 2020-2025
Table 47 - Sales in Limited-Service Restaurants by Category: % Foodservice Value Growth 2020-2025
Table 48 - GBO Company Shares in Chained Limited-Service Restaurants: % Foodservice Value 2021-2025
Table 49 - GBN Brand Shares in Chained Limited-Service Restaurants: % Foodservice Value 2022-2025
Table 50 - Forecast Limited-Service Restaurants by Category: Units/Outlets 2025-2030
Table 51 - Forecast Sales in Limited-Service Restaurants by Category: Number of Transactions 2025-2030
Table 52 - Forecast Sales in Limited-Service Restaurants by Category: Foodservice Value 2025-2030
Table 53 - Forecast Limited-Service Restaurants by Category: % Units/Outlets Growth 2025-2030
Table 54 - Forecast Sales in Limited-Service Restaurants by Category: % Transaction Growth 2025-2030
Table 55 - Forecast Sales in Limited-Service Restaurants by Category: % Foodservice Value Growth 2025-2030

DISCLAIMER

Self-Service Cafeterias in China

KEY DATA FINDINGS

2025 DEVELOPMENTS

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?

Attractive value-for-money proposition will continue to underpin category expansion
Influence of "wok hei" revival set to become more visible
Population ageing offers growth opportunities for self-service cafeterias

COMPETITIVE LANDSCAPE

Mr Rice consolidates its already sizeable lead
In-store cafeterias operated by supermarkets pose growing competitive threat
Chained players remain dominant as independents continue to lose ground

CATEGORY DATA

Table 56 - Self-Service Cafeterias: Units/Outlets 2020-2025
Table 57 - Sales in Self-Service Cafeterias: Number of Transactions 2020-2025
Table 58 - Sales in Self-Service Cafeterias: Foodservice Value 2020-2025
Table 59 - Sales in Self-Service Cafeterias: % Units/Outlets Growth 2020-2025
Table 60 - Sales in Self-Service Cafeterias: % Transaction Growth 2020-2025
Table 61 - Sales in Self-Service Cafeterias: % Foodservice Value Growth 2020-2025
Table 62 - GBO Company Shares in Chained Self-Service Cafeterias: % Foodservice Value 2021-2025
Table 63 - GBN Brand Shares in Chained Self-Service Cafeterias: % Foodservice Value 2022-2025
Table 64 - Forecast Self-Service Cafeterias: Units/Outlets 2025-2030
Table 65 - Forecast Sales in Self-Service Cafeterias: Number of Transactions 2025-2030
Table 66 - Forecast Sales in Self-Service Cafeterias: Foodservice Value 2025-2030
Table 67 - Forecast Self-Service Cafeterias: % Units/Outlets Growth 2025-2030
Table 68 - Forecast Sales in Self-Service Cafeterias: % Transaction Growth 2025-2030
Table 69 - Forecast Sales in Self-Service Cafeterias: % Foodservice Value Growth 2025-2030

DISCLAIMER

Street Stalls/Kiosks in China

KEY DATA FINDINGS

2025 DEVELOPMENTS

Busier lifestyles and increased budget-consciousness boost trade

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?

Convenience and cheaper menu prices will remain key selling points
Easing of delivery price war likely to contribute to greater consolidation

Tea specialists will continue to expand their coffee menus

COMPETITIVE LANDSCAPE

Mixue Group strengthens its leading position
Cotti Coffee and Good me are the best performing brands in value growth terms
Chained operators retain largest share of total value sales

CATEGORY DATA

Table 70 - Street Stalls/Kiosks: Units/Outlets 2020-2025
Table 71 - Sales in Street Stalls/Kiosks: Number of Transactions 2020-2025
Table 72 - Sales in Street Stalls/Kiosks: Foodservice Value 2020-2025
Table 73 - Street Stalls/Kiosks: % Units/Outlets Growth 2020-2025
Table 74 - Sales in Street Stalls/Kiosks: % Transaction Growth 2020-2025
Table 75 - Sales in Street Stalls/Kiosks: % Foodservice Value Growth 2020-2025
Table 76 - GBO Company Shares in Chained Street Stalls/Kiosks: % Foodservice Value 2021-2025
Table 77 - GBN Brand Shares in Chained Street Stalls/Kiosks: % Foodservice Value 2022-2025
Table 78 - Forecast Street Stalls/Kiosks: Units/Outlets 2025-2030
Table 79 - Forecast Sales in Street Stalls/Kiosks: Number of Transactions 2025-2030
Table 80 - Forecast Sales in Street Stalls/Kiosks: Foodservice Value 2025-2030
Table 81 - Forecast Street Stalls/Kiosks: % Units/Outlets Growth 2025-2030
Table 82 - Forecast Sales in Street Stalls/Kiosks: % Transaction Growth 2025-2030
Table 83 - Forecast Sales in Street Stalls/Kiosks: % Foodservice Value Growth 2025-2030

DISCLAIMER

Consumer Foodservice By Location in China

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

CATEGORY DATA

Table 84 - Consumer Foodservice by Location: Units/Outlets 2020-2025
Table 85 - Sales in Consumer Foodservice by Location: Number of Transactions 2020-2025
Table 86 - Sales in Consumer Foodservice by Location: Foodservice Value 2020-2025
Table 87 - Consumer Foodservice by Location: % Units/Outlets Growth 2020-2025
Table 88 - Sales in Consumer Foodservice by Location: % Transaction Growth 2020-2025
Table 89 - Sales in Consumer Foodservice by Location: % Foodservice Value Growth 2020-2025
Table 90 - Consumer Foodservice Through Standalone: Units/Outlets 2020-2025
Table 91 - Sales in Consumer Foodservice Through Standalone: Number of Transactions 2020-2025

Table 92 - Sales in Consumer Foodservice Through Standalone: Foodservice Value 2020-2025
Table 93 - Consumer Foodservice Through Standalone: % Units/Outlets Growth 2020-2025
Table 94 - Sales in Consumer Foodservice Through Standalone: % Transaction Growth 2020-2025
Table 95 - Sales in Consumer Foodservice Through Standalone: % Foodservice Value Growth 2020-2025
Table 96 - Consumer Foodservice Through Leisure: Units/Outlets 2020-2025
Table 97 - Sales in Consumer Foodservice Through Leisure: Number of Transactions 2020-2025
Table 98 - Sales in Consumer Foodservice Through Leisure: Foodservice Value 2020-2025
Table 99 - Consumer Foodservice Through Leisure: % Units/Outlets Growth 2020-2025
Table 100 - Sales in Consumer Foodservice Through Leisure: % Transaction Growth 2020-2025
Table 101 - Sales in Consumer Foodservice Through Leisure: % Foodservice Value Growth 2020-2025
Table 102 - Consumer Foodservice Through Retail: Units/Outlets 2020-2025
Table 103 - Sales in Consumer Foodservice Through Retail: Number of Transactions 2020-2025
Table 104 - Sales in Consumer Foodservice Through Retail: Foodservice Value 2020-2025
Table 105 - Consumer Foodservice Through Retail: % Units/Outlets Growth 2020-2025
Table 106 - Sales in Consumer Foodservice Through Retail: % Transaction Growth 2020-2025
Table 107 - Sales in Consumer Foodservice Through Retail: % Foodservice Value Growth 2020-2025
Table 108 - Consumer Foodservice Through Lodging: Units/Outlets 2020-2025
Table 109 - Sales in Consumer Foodservice Through Lodging: Number of Transactions 2020-2025
Table 110 - Sales in Consumer Foodservice Through Lodging: Foodservice Value 2020-2025
Table 111 - Consumer Foodservice Through Lodging: % Units/Outlets Growth 2020-2025
Table 112 - Sales in Consumer Foodservice Through Lodging: % Transaction Growth 2020-2025
Table 113 - Sales in Consumer Foodservice Through Lodging: % Foodservice Value Growth 2020-2025
Table 114 - Consumer Foodservice Through Travel: Units/Outlets 2020-2025
Table 115 - Sales in Consumer Foodservice Through Travel: Number of Transactions 2020-2025
Table 116 - Sales in Consumer Foodservice Through Travel: Foodservice Value 2020-2025
Table 117 - Consumer Foodservice Through Travel: % Units/Outlets Growth 2020-2025
Table 118 - Sales in Consumer Foodservice Through Travel: % Transaction Growth 2020-2025
Table 119 - Sales in Consumer Foodservice Through Travel: % Foodservice Value Growth 2020-2025
Table 120 - Forecast Consumer Foodservice by Location: Units/Outlets 2025-2030
Table 121 - Forecast Sales in Consumer Foodservice by Location: Number of Transactions 2025-2030
Table 122 - Forecast Sales in Consumer Foodservice by Location: Foodservice Value 2025-2030
Table 123 - Forecast Consumer Foodservice by Location: % Units/Outlets Growth 2025-2030
Table 124 - Forecast Sales in Consumer Foodservice by Location: % Transaction Growth 2025-2030
Table 125 - Forecast Sales in Consumer Foodservice by Location: % Foodservice Value Growth 2025-2030
Table 126 - Forecast Consumer Foodservice Through Standalone: Units/Outlets 2025-2030
Table 127 - Forecast Sales in Consumer Foodservice Through Standalone: Number of Transactions 2025-2030
Table 128 - Forecast Sales in Consumer Foodservice Through Standalone: Foodservice Value 2025-2030
Table 129 - Forecast Consumer Foodservice Through Standalone: % Units/Outlets Growth 2025-2030
Table 130 - Forecast Sales in Consumer Foodservice Through Standalone: % Transaction Growth 2025-2030
Table 131 - Forecast Sales in Consumer Foodservice Through Standalone: % Foodservice Value Growth 2025-2030
Table 132 - Forecast Consumer Foodservice Through Leisure: Units/Outlets 2025-2030
Table 133 - Forecast Sales in Consumer Foodservice Through Leisure: Number of Transactions 2025-2030
Table 134 - Forecast Sales in Consumer Foodservice Through Leisure: Foodservice Value 2025-2030
Table 135 - Forecast Consumer Foodservice Through Leisure: % Units/Outlets Growth 2025-2030
Table 136 - Forecast Sales in Consumer Foodservice Through Leisure: % Transaction Growth 2025-2030
Table 137 - Forecast Sales in Consumer Foodservice Through Leisure: % Foodservice Value Growth 2025-2030
Table 138 - Forecast Consumer Foodservice Through Retail: Units/Outlets 2025-2030
Table 139 - Forecast Sales in Consumer Foodservice Through Retail: Number of Transactions 2025-2030
Table 140 - Forecast Sales in Consumer Foodservice Through Retail: Foodservice Value 2025-2030
Table 141 - Forecast Consumer Foodservice Through Retail: % Units/Outlets Growth 2025-2030
Table 142 - Forecast Sales in Consumer Foodservice Through Retail: % Transaction Growth 2025-2030
Table 143 - Forecast Sales in Consumer Foodservice Through Retail: % Foodservice Value Growth 2025-2030

Table 144 - Forecast Consumer Foodservice Through Lodging: Units/Outlets 2025-2030
Table 145 - Forecast Sales in Consumer Foodservice Through Lodging: Number of Transactions 2025-2030
Table 146 - Forecast Sales in Consumer Foodservice Through Lodging: Foodservice Value 2025-2030
Table 147 - Forecast Consumer Foodservice Through Lodging: % Units/Outlets Growth 2025-2030
Table 148 - Forecast Sales in Consumer Foodservice Through Lodging: % Transaction Growth 2025-2030
Table 149 - Forecast Sales in Consumer Foodservice Through Lodging: % Foodservice Value Growth 2025-2030
Table 150 - Forecast Consumer Foodservice Through Travel: Units/Outlets 2025-2030
Table 151 - Forecast Sales in Consumer Foodservice Through Travel: Number of Transactions 2025-2030
Table 152 - Forecast Sales in Consumer Foodservice Through Travel: Foodservice Value 2025-2030
Table 153 - Forecast Consumer Foodservice Through Travel: % Units/Outlets Growth 2025-2030
Table 154 - Forecast Sales in Consumer Foodservice Through Travel: % Transaction Growth 2025-2030
Table 155 - Forecast Sales in Consumer Foodservice Through Travel: % Foodservice Value Growth 2025-2030

DISCLAIMER

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