



**Euromonitor
International**

Limited-Service Restaurants in China

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Table of Contents

Limited-Service Restaurants in China - Category analysis

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 1 - Limited-Service Restaurants by Category: Units/Outlets 2020-2025

Table 2 - Sales in Limited-Service Restaurants by Category: Number of Transactions 2020-2025

Table 3 - Sales in Limited-Service Restaurants by Category: Foodservice Value 2020-2025

Table 4 - Limited-Service Restaurants by Category: % Units/Outlets Growth 2020-2025

Table 5 - Sales in Limited-Service Restaurants by Category: % Transaction Growth 2020-2025

Table 6 - Sales in Limited-Service Restaurants by Category: % Foodservice Value Growth 2020-2025

Table 7 - GBO Company Shares in Chained Limited-Service Restaurants: % Foodservice Value 2021-2025

Table 8 - GBN Brand Shares in Chained Limited-Service Restaurants: % Foodservice Value 2022-2025

Table 9 - Forecast Limited-Service Restaurants by Category: Units/Outlets 2025-2030

Table 10 - Forecast Sales in Limited-Service Restaurants by Category: Number of Transactions 2025-2030

Table 11 - Forecast Sales in Limited-Service Restaurants by Category: Foodservice Value 2025-2030

Table 12 - Forecast Limited-Service Restaurants by Category: % Units/Outlets Growth 2025-2030

Table 13 - Forecast Sales in Limited-Service Restaurants by Category: % Transaction Growth 2025-2030

Table 14 - Forecast Sales in Limited-Service Restaurants by Category: % Foodservice Value Growth 2025-2030

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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

CHANNELS

Independents continue to lose ground to chained operators

MARKET DATA

Table 15 - Units, Transactions and Value Sales in Consumer Foodservice 2020-2025

Table 16 - Units, Transactions and Value Sales in Consumer Foodservice: % Growth 2020-2025

Table 17 - Consumer Foodservice by Independent vs Chained by Type: Units/Outlets 2025

Table 18 - Consumer Foodservice by Independent vs Chained: % Foodservice Value 2020-2025

Table 19 - Sales in Consumer Foodservice by Food vs Drink Split: % Foodservice Value 2020-2025

Table 20 - Sales in Consumer Foodservice by Food vs Drink Split by Type: % Foodservice Value 2025

Table 21 - Sales in Consumer Foodservice by Location: % Foodservice Value 2020-2025

Table 22 - Sales in Consumer Foodservice by Fulfillment: % Foodservice Value 2020-2025

Table 23 - GBO Company Shares in Chained Consumer Foodservice: % Foodservice Value 2021-2025

Table 24 - GBN Brand Shares in Chained Consumer Foodservice: % Foodservice Value 2022-2025

Table 25 - GBN Brand Shares in Chained Consumer Foodservice: Units/Outlets 2025

Table 26 - Forecast Units, Transactions and Value Sales in Consumer Foodservice 2025-2030

Table 27 - Forecast Units, Transactions and Value Sales in Consumer Foodservice: % Growth 2025-2030

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SOURCES

Summary 1 - Research Sources

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