



Full-Service Restaurants in China

April 2026

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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

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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

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