



Consumer Foodservice in Hong Kong, China

March 2026

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Consumer Foodservice in Hong Kong, China

EXECUTIVE SUMMARY

Heightened price sensitivity amid a challenging macroeconomic environment

KEY DATA FINDINGS

INDUSTRY PERFORMANCE

Widespread downtrading across foodservice formats

Operators adapt fulfilment models to manage costs and align with changing consumer behaviour

Experiences and emotional engagement influence consumers' choices

WHAT'S NEXT?

Value growth constrained by persistent price sensitivity

Innovation to focus increasingly on tangible value creation

Sustainability: a secondary but growing consideration

COMPETITIVE LANDSCAPE

Leading chains benefit from strong brand recognition, while independent players are valued for their creativity

Operators focus on portfolio optimisation in 2025

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Market favours operators that clearly communicate value and adapt quickly

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Impact of northbound consumption, changing tourist spending habits and rising economic uncertainty

Independent coffee and tea shops as lifestyle-led social spaces

Hybrid operating models gaining traction

WHAT'S NEXT?

Players that lack a clear identity or compelling value proposition are likely to struggle

Consumers look for venues that offer strong value beyond just food and drinks

Consumers will continue to prioritise health-oriented choices

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A challenging operating environment for full-service restaurants in 2025

INDUSTRY PERFORMANCE

Northbound consumption, shifting tourist dining behaviour and ongoing economic uncertainty weaken demand

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Experiential dine-in concepts have become a key way to justify higher price points and attract diners

WHAT'S NEXT?

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WHAT'S NEXT?

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Competitiveness of self-service cafeterias increasingly undermined

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WHAT'S NEXT?

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KEY DATA FINDINGS

2025 DEVELOPMENTS

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INDUSTRY PERFORMANCE

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Growing shift towards informal eating out among both local consumers and tourists

Delivery gains traction as consumer behaviour continues to evolve

WHAT'S NEXT?

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Rising importance of online ordering for both takeaway and delivery

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COMPETITIVE LANDSCAPE

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2025 DEVELOPMENTS

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INDUSTRY PERFORMANCE

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WHAT'S NEXT?

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