



Euromonitor
International

Limited-Service Restaurants in China

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Limited-Service Restaurants in China - Category analysis

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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

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Yum! Restaurants retains overall lead in value terms

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Independents continue to lose ground

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Consumer Foodservice in China - Industry Overview

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Trade remains resilient despite market-wide slowdown

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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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