



Euromonitor  
International

# Cafés/Bars in China

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## Cafés/Bars in China - Category analysis

### 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

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Independents face biggest threat from chains in specialist coffee and tea shops

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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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