

Teahouses and Coffeehouses - China - October 2012

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"Café chains only really began to appear in China in the late 1990s, and have grown very rapidly in number since, while the tea house sector has struggled to find a response in terms of a successful organised, branded, franchised chain. Yet both sectors remain locked in competition for the higher-end urban consumers who enjoy the cultural cachet of premium cafés and tea houses.

Yet the high end is only part of the story, and not only do we already have fast food and convenience store cafés coming in to compete for a younger, lower-income market, there has also been the recent development of the bubble tea phenomenon, with their tea and coffee soft drinks fusion concept."

– Matthew Crabbe – Asia-Pacific Research Director

In this report we answer the key questions:

- How has the recent emergence of cafés and coffee culture impacted the traditional place of tea and tea houses in China?
- Which companies have been leading the race to develop the café market, and how are they innovating to stay ahead in developing consumer interest?
- What has been the effect of the emergence of fast food and convenience stores cafés?
- Which consumer groups are the leading café and tea house chains appealing most to, and who are they missing out?
- How has the emergence of bubble tea chains affected the markets for both cafés and tea houses?
- Is the emergence of more fusion food in the wider catering market beginning to influence café and tea house drinks and food menus?

.This report covers multiple and independent coffee shops and tea houses.

- Coffee shops are defined as outlets where coffee accounts for a sizeable (usually at least around 40%) part of sales with quite a restricted, mainly light meals and snack food offering. Market value is based on expenditure including sales tax in these outlets; market volume is based on number of outlets.
- Tea houses are defined as outlets where tea accounts for a sizeable (usually at least around 40%) part of sales with a restricted, mainly light meals and snack food offering. Market value is based on expenditure including sales tax in these outlets; market volume is based on number of outlets.

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