

Fast Food - China - April 2013

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“Chinese fast food chains are gaining momentum with a faster expansion rate compared with their Western competitors, the latter thus facing growing pressure. For both Chinese and Western fast food operators to obtain competitive advantages, it’s crucial to tailor their strategies to the location and consumer segment.”

– David Zhang, Research Analyst

In this report we answer the key questions:

- How does the domestic chains’ rapid expansion highlight the need for product innovation?
- How have the food safety scares of 2012 put the fast food market under scrutiny?
- What impact will healthy living lifestyles have on fast food chains in China?
- What breakfast opportunities are there in the fast food market?

Sales in the Chinese fast food market more than doubled over the 2007-12 period, to reach an estimated RMB1 trillion, fuelled by the growth of the economy and consumer incomes and rapid expansion of leading players in the market. However, the market remains highly fragmented. The top ten operators only accounted for 0.65% of the market in 2011. The vast majority (98%) of the market still consists of small independent restaurants, which indicates there is substantial potential for growth for fast food chains in China.

The fast food market has come under scrutiny after recently exposed food safety scandals and it also faces potential threats from consumers’ growing health concerns. However, targeted strategies tailored to the location and consumer segment can assist fast food outlets in China to convert these potential threats into opportunities.

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