

Report Price: £3302.97 | \$4460.00 | €3717.16

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.



"Although growing dramatically, China's fast causal market is still in a stage of infancy. Existing fast casual brands should focus on workday lunch as well as explore other occasions, especially workday dinner and late-night meal."

- Summer Chen, Research Analyst

This report looks at the following areas:

There is also opportunity in the market for more Chinese-style fast casual brands providing inviting store atmosphere, fun dining experience and premium offerings.

- Improving appeal for workday lunches
- Occasion extension
- Opportunity for more fast casual brands offering Chinese-style foods

BUY THIS REPORT NOW

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533

> Brazil 0800 095 9094

Americas +1 (312) 943 5250

+86 (21) 6032 7300

+61 (0) 2 8284 8100

EMAIL: reports@mintel.com

DID YOU KNOW?

This report is part of a series of reports, produced to provide you with a more holistic view of this market



Report Price: £3302.97 | \$4460.00 | €3717.16

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Table of Contents

Overview

What you need to know

Covered in this report

Definitions

Figure 1: Definition of premium/non-premium diners

Figure 2: Definition of low/mid/high MHI groups, by city tier

Executive Summary

The market

Market in stage of infancy with a triple-digit growth

Figure 3: Market size of fast casual market, China, 2014-17

Demand for quality meals and a fun new dining experience continue to fuel growth

Companies and brands

Small chains rule

Up-to-date menus and fun dining experiences help to attract more visits

Innovation highlights

The consumer

Workday lunch is the most important dining out occasion

Figure 4: Frequency of eating out, October 2017

27% spend more than RMB 40 on a typical workday lunch

Figure 5: Spending on workday lunch, October 2017

Premium diners value variety and specialty dishes more

Figure 6: Factors of choosing workday lunch venues, October 2017

Figure 7: Factors of choosing workday lunch venues, by consumer classification, October 2017

Main-dish salad: cooked vegetables preferred

Figure 8: Ideal main-dish salad, dressing taste, October 2017

What we think

Issues and Insights

Improving appeal for workday lunches

The facts

The implications

Occasion extension

The facts

The implications

Opportunity for more fast casual brands offering Chinese-style foods

The facts

The implications

Figure 9: Nagi Ramen

BUY THIS REPORT NOW VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094 Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 | **EMAIL:** reports@mintel.com



Report Price: £3302.97 | \$4460.00 | €3717.16

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

The Market - What You Need to Know

Market in stage of infancy with triple-digit growth

Demand for a quality meal and fun new dining experience fuel growth

Market Size

Definition and evolution of fast causal

Fast casual in China

Figure 10: Market size of fast casual market, China, 2014-17

Market Drivers

Fast, quality meals wanted in a busier, modern life

Figure 11: Dining habits and attitudes, fast casual format, October 2017

Young consumers craving new fun dining experiences

A way for restaurant brands to justify higher prices

Key Players - What You Need to Know

Small chains rule

Up-to-date menus and fun dining experiences help to attract more visits

Innovation highlights

Leading Players

New light meal offerings

Figure 12: Market volume of leading players in the fast casual market, new offerings of light meals, China, 2017

Wagas

Figure 13: Interior design of Wagas

Max & Salad

Figure 14: Ordering with chips, Max & Salad

Other leading brands

Fast-served quality traditional offerings

Figure 15: Market volume of leading players in the fast casual market, fast-served quality traditional offerings, China, 2017

Hefu-Noodle & Taoyuan Village

Figure 16: interior design of Hefu-Noodle and Taoyuan Village

Other leading brands

Competitive Strategies

A trendy, localised menu

Adding a bit of fun into the health angle

Eye-catching presentations

Store design

Dish and packaging design

Figure 17: dish and packaging design

Who's Innovating?

BUY THIS REPORT NOW VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094 Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100

EMAIL: reports@mintel.com



Report Price: £3302.97 | \$4460.00 | €3717.16

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Hunter Gatherer: restaurant + food market

Figure 18: Interior design and display of hunter gatherer, China

Sweetgreen: unique store design for each chain

Figure 19: Exterior and interior of sweetgreen, US

Pret A Manger (UK): pop-up store to test new menu items

Shake Shack: social media to create buzz

The Consumer - What You Need to Know

Workday lunch is the most important dining out occasion

27% spend more than RMB 40 on a typical workday lunch

Premium diners value variety and specialty dishes more

Main-dish salad: cooked vegetables preferred

Frequency of Eating Out

Most consumers eat out frequently for workday lunches but not non-working meals

Figure 20: Frequency of eating out, October 2017

Targeting solo dwellers for regular workday dinners

Figure 21: Selected frequency of eating out, 3 times a week or more, by living status, October 2017

Eating out for non-working meals more popular among premium diners

Figure 22: Frequency of eating out, workday dinner, by user category, October 2017

Figure 23: Frequency of eating out, holiday lunch/dinner, by user category, October 2017

Spending on Workday Lunches

27% premium diners

Figure 24: Spending on workday lunch, October 2017

Market in tier two cities should not be neglected

Figure 25: Proportion of premium diners, by city, October 2017

Factors of Choosing Workday Lunch Venues

Quality more critical than fast service

Figure 26: Factors of choosing workday lunch venues, October 2017

Premium diners value variety and specialty dishes more

Figure 27: Factors of choosing workday lunch venues, by consumer classification, October 2017

For ingredients, fresh is more important than premium

Figure 28: Factors of choosing workday lunch venues, ingredients, by consumer classification, October 2017

Figure 29: Examples of restaurant communications highlighting freshness, China

Factors of Holiday Dining Habits

$\label{thm:cooking} \mbox{Health rather than financial reasons is the top driver for in-home cooking}$

Figure 30: Factors of holiday dining habits, cooking at home, October 2017

Consumers dine out for socialising as often as for the food

Figure 31: Factors of holiday dining habits, dining out, October 2017

BUY THIS REPORT NOW

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094 Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 | **EMAIL:** reports@mintel.com



Report Price: £3302.97 | \$4460.00 | €3717.16

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Ideal Main-Dish Salad

Ingredients: no need for heating, but vegetables should be cooked

Figure 32: Ideal main-dish salad, temperature when serving, October 2017 Figure 33: Ideal main-dish salad, preparation of vegetables, October 2017

Dressing: rich and creamy preferred texture, while taste preference varies

Figure 34: Ideal main-dish salad, dressing texture, October 2017

Figure 35: Ideal main-dish salad, dressing taste, October 2017

Dressing: sweetish and sour tastes pair better with a creamy texture while spicy and savoury go better with a light one

Figure 36: Ideal main-dish salad, dressing texture and taste, October 2017

Dining Habits and Attitudes

The majority have a high standard regarding their diets

Figure 37: Dining habits and attitudes, diet, October 2017

Figure 38: Spending on workday lunch, by dining habits and attitudes, diet, October 2017

Figure 39: Factors of choosing workday lunch venues, by dining habits and attitudes, October 2017

Western fast food brands are not yet associated with healthy and high-quality meals

Figure 40: Dining habits and attitudes, health issue of fast food brands, October 2017

Figure 41: Dining habits and attitudes, quality issue of fast food brands, October 2017

Meet the Mintropolitans

Have a higher standard for diet

Figure 42: Dining habits and attitudes, diet, by consumer classification, October 2017

And are willing to pay more for it

Figure 43: Proportion of premium diners, by consumer classification, October 2017

Appendix – Market Size

Figure 44: Value sales of fast casual market, China, 2014-17

Appendix - Methodology and Abbreviations

Methodology

Abbreviations

APAC +61 (0) 2 8284 8100 | **EMAIL:** reports@mintel.com