

Attitudes Towards and Usage of Domestic Fast Food - China - July 2012

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"China's domestic fast food restaurants (DFFRs) is worth 87.84% of the overall fast food sector by value, far exceeding foreign fast food. Through standardisation and franchise, the diversification of major brands, and product innovation this market will continue to develop with the introduction of more Chinese fast food chains in competition with the foreign sector. The main challenge for DFFRs is the consistency and quality posed by foreign fast food."

- Nelly Mao - Senior Analyst

In this report we answer the key questions:

- How can Domestic Fast Food Restaurants compete against FFFRs in delivering convenience?
- How can DFFRs successfully promote leisure consumption?
- How are DFFRs reacting to the growing need for healthy diets?
- How can DFFR brands increase customer engagement and build their consumer base?

Chinese fast food restaurants are defined by menu and not by ownership, and are limited-service, limited-seating restaurants selling food for consumption on site, takeaway and home delivery from a restricted or set menu. They offer Chinese-style fast food from dishes with rice, noodles, dumplings, and others. Compared to western fast foods, not all Chinese fast foods are finished and packaged to order. Some are ready made or reprocessed when ordered. The foods are usually sold and delivered in an amount of time ranging from a few seconds to several minutes.

Market size is calculated for restaurants with annual turnover above the threshold, which according to the National Bureau of Statistics (NBS) is about RMB2 million per year. However, in reality the annual revenue per outlet varies in different provinces and locations. Therefore, the threshold used for the purposes of this report is RMB 0.5 million per outlet per year.

Two types of domestic fast-food restaurants (DFFRs) are discussed based on food offerings: rice-based fast food providers (eg J-Kungfu, UFF, East Dawning) that specialize in offering full meals with rice and usually a rich selection of options, and specialty food providers (eg Gill Wonton, Daniang Dumpling, New Asia Dabao), which focus on special food-items such as noodles and steamed buns. Nowadays more specialty food providers such as Yonghe King and Malan Ramen are providing rice with dishes as well, but lower variety options are available and their focus is still on special foods.

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