

January 2022

菜单洞察 —— 茶饮店（下半年） -
China

“过去数十年来，茶饮店行业欣欣向荣，并以直营或加盟的商业模式继续蓬勃发展。消费者越来越偏好清淡的口感和注重健康的产品，青睐纯茶和精简产品，并且看重高品质原料。强调有益健康的特性，同时与植根于中国文化的茶饮创意相结合，将成为高端茶饮的未来趋势。”

— 高屹，研究分析师

食用油 - China

“得益于食用油价格上涨，在后疫情时代，食用油销售额继续保持增长势头。然而，由于消费者外出就餐的机会增加，食用油的使用量随之下跌，因此预计长期的增长将放缓。为了维持销售额增长，品牌应该为不同年龄的群体量身定制产品和营销方法，并推出食用油礼品组合，以满足消费者对多样化油种的需求。”

— 殷如君，研究分析师

December 2021

外卖咖啡 - China

“得益于餐饮服务的复苏，外卖咖啡得以从新冠疫情中快速反弹，重点企业持续扩张，资本不断流入该市场。然而，面对来自即饮咖啡饮料及速溶咖啡形式的竞争，加上外卖咖啡产品日益同质化，若欲成为有竞争力的品牌，就必须加强数字化与标准化，并优化店内体验，以提升便利性、可及性和声誉，并积极加强社交属性。”

— 黄梦菲，研究分析师

November 2021

On-premise Coffee Consumption -
China

“Thanks to the recovery of foodservice, on-premise coffee rebounded from COVID-19 quickly with the continued expansion of key players and investment flows in the industry. However, confronting competition from RTD and instant coffee formats, as well as growing product homogeneity in on-premise coffee, to be competitive brands must increase digitalisation ...

Menu Insights - Tea Houses 2H -
China

“The tea house industry has been blooming in the past decades, and continuing to flourish with company-operated or franchise business models. Consumers' increased preference in the lighter mouthfeel and health-conscious product selections have put pure tea and lean products at front with a focus on high-quality raw materials. Together, an ...

September 2021

西式休闲餐饮店 - China

“菜单创新是实现长期增长的关键。餐厅可以尝试利用融合菜来获得差异化优势，或借可食用美容产品潮流乘势与美容品牌跨界合作。此外，餐厅还需要提供优质的用餐体验，使其成为消费者餐饮习惯和整体生活方式中不可或缺的一部分。”

— 俞文，研究分析师

August 2021

Western Style Casual Dining -
China

“Menu innovations are the key to fuelling growth in the long term. Restaurants can experiment with fusions to differentiate while crossover collaborations with beauty brands can ride on the trend of edible beauty. On top of this, restaurants need to deliver optimal dining experience, making it an inseparable part of ...”

菜单洞察——茶饮店（上半年）- 中国 -
China

“茶饮店将通过采用特定功能性配料加速进入下一个发展阶段。品牌还需要向消费者直接沟通健康的功效效果。面对无法避免的创新同质化，市场参与者可以通过营销策略实现差异化。这包括采用独特的营销方式来区别相似的产品、进军餐饮行业或聚集兴趣相同的消费者以提升品牌辨识度。”

— 俞文，研究分析师

July 2021

Menu Insights - Tea Houses 1H -
China

“Tea house growth will accelerate into the next phase by adopting specific functional ingredients. Brands also need to leverage direct communication with explicit health perks. Facing unstoppable homogenisation in innovation, players can differentiate through marketing tactics. This could include distinct marketing for similar products, expanding into additional meal catering, or ...”

烘焙店 - China

“新冠疫情让消费者流向同样能够供应新鲜优质包装烘焙产品的O2O零售商。新鲜烘焙产品领域竞争因此愈发激烈。烘焙店需要发挥先天优势，推出有功能性配料的高端产品，从零食或膳食角度挖掘更多食用场景。此外，提供增值服务可以提高消费者忠诚度，在竞争激烈的市场中彰显品牌的独特性。”

— 俞文，研究分析师

June 2021

Bakery Houses - China

“The battlefield for fresh bakeries has expanded since COVID-19 has shifted consumers to the O2O retailers that are able to offer fresh and quality packaged bakery as well. Bakery houses need to leverage the inherent edge in premiumising products with functional ingredients and drive more consumption occasions for meals and ...”

May 2021

火锅餐饮 - China

“火锅菜单的持续创新似乎不再能确保企业长盛不衰。致力于吸引宠物主人等新兴消费群体，以及融合中国元素来回应消费者强烈的民族自豪感将成为实现差异化的新方法。同时，地方风味火锅崛起，而高端化趋势也从火锅本身上升到整体菜单层面。新冠疫情削弱了线下餐饮市场，但同时也催化了零售趋势，火锅经营者需要谨慎选择销售的产品，以避免来自预加工食品和零食品牌等大量相邻业态的激烈竞争，这些业态也在开发相关火锅零售组合。”

— 俞文，研究分析师

April 2021

Hot Pot Dining - China

“Relentless innovation on hot pot menus seems no longer sufficient to secure long-term prosperity. Efforts to engage booming consumer groups such as pet owners and to incorporate Chinese elements amid sizzling national pride will become new approaches to differentiate, along with the rise of regional hot pot and the premiumisation ...

菜单洞察 —— 区域美食 - China

“川菜、粤菜和湘菜在国内区域美食中占主导地位，日本和韩国料理则是中国主流消费者最受欢迎的外国美食。尽管消费者对不同区域美食的偏好变化甚微，消费者仍普遍追求味道地道的美食体验，这表明餐厅应该打破陈规，通过进一步区域细分来彰显特色。新冠疫情的爆发让居家烹饪成为趋势，为餐厅带创造了更多出售包装产品的零售机遇。”

— 俞文，研究分析师

March 2021

Menu Insights - Regional Cuisines - China

“Sichuan, Cantonese and Hunan cuisines dominate the domestic regional cuisine market while Japanese and Korean are the leading popular foreign cuisines for mainstream consumers in China. Despite the slow change in preferences, authenticity is a common theme consumers are looking for in their dining experiences, suggesting it's time for restaurants ...