



# Limited-Service Restaurants in Asia Pacific

May 2022

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## INTRODUCTION

Scope

Key findings

## REGIONAL OVERVIEW

High sales level for LSR in Asia Pacific

LSR records a strong rebound in Asia Pacific in 2021

LSR channel continues growing during the pandemic in South Korea

Chicken LSR performing strongly in the region's biggest markets

South Korea responsible for a major share of new LSR sales in 2016-2021

Chained players cope better than independents during the pandemic

Standalone continues to dominate sales

No location able to fully recover to pre-pandemic sales levels in 2021

## LEADING COMPANIES AND BRANDS

Extremely fragmented LSR competitive landscape in China

Japanese convenience stores fill three of the top five places

Japan the main market for the bulk of the top 10 players

cnHLS growing on the back of its chicken LSR offer

## FORECAST PROJECTIONS

LSR returns to positive growth in 2021...

...with a swift return to 2019 sales levels currently expected

## COUNTRY SNAPSHOTS

China: Market Context

China: Competitive and Retail Landscape

Hong Kong, China: Market Context

Hong Kong, China: Competitive and Retail Landscape

India: Market Context

India: Competitive and Retail Landscape

Indonesia: Market Context

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South Korea: Competitive and Retail Landscape

Taiwan: Market Context

Taiwan: Competitive and Retail Landscape

Thailand: Market Context

Thailand: Competitive and Retail Landscape

Vietnam: Market Context

Vietnam: Competitive and Retail Landscape

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