



**China Chain Catering Industry
Report, 2010-2011**

Sep. 2011

This report

- ◆ **Analyzes development of Chinese chain catering industry.**
- ◆ **Focuses on the investment and financing in Chinese chain catering industry.**
- ◆ **Highlights the operation of key enterprises in Chinese food chain industry, Hot-Pot Chain industry and Western food chain industry.**

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Abstract

In H1 2011, the revenue of catering industry of China totaled RMB957.93 billion, a 16.2% YoY rise; and the cumulated investments increased by 34.8% YoY to RMB164.273 billion, with an increase of 12.1 points in growth rate against the same period of last year.

Among the top 100 Chinese catering companies during 2009-2010, only about 10% of them have no chain stores; of the rest 90% chain ones, on average, each boasts outlets in nearly 40 cities. In all, the chain stores (regular chain plus franchised stores) of the top 100 chain companies numbered close to 22,000.

From 2008 till now, a total of 20 or more catering chain companies acquire VC/PE capital injection. Among these, 8 ones including Best-Food, Beijing Jiahe Yipin, South Memory and Golden Valley receive the fund investments in Renminbi. In July 2011, Apax Partners purchased Golden Jaguar at a price of USD250million, the record single investment ever with the largest figures in the industry.

Fundraisings of Some Chinese Catering Companies, 2007-2011

IPO Financing Rankings of Catering Companies					
No.	Company Name	Date of Listing	Place of Listing	Raised Funds (Net)	RMB (mln)
1	Ajisen (China) Holdings	Mar.2007	HK	HKD1.5bn	approx.1,402
2	Beijing Xiang'e Qing	Nov.2009	Shenzhen	RMB950mln	approx.950
3	CSC (Country Style Cooking)	Sep.2010	New York	USD82.5mln	approx.547
4	Inner Mongolia Little Sheep Catering Chain	Jun.2008	HK	HKD462mln	approx.406
5	China Quanjude	Nov.2007	Shenzhen	RMB388mln	approx.388
VC/PE Financing Rankings of Catering Companies (Projects with the Value Revealed)					
No.	Company Name	Date of Financing	Investor	Investment	RMB (mln)
1	Golden Jaguar	Jul.2011	Apax Partners	USD250mln	approx.1,602
2	Best-Food	Sep.2010	Shenzhen Venture Capital	RMB 1bn	approx.1,000
3	Oriental Caigenxiang	Oct.2008	China US Bridge Capital	USD56.32mln	approx.384
4	Xiabu Xiabu	Nov.2008	Actis Capital LLP	USD50mln	approx.341
5	Chun Chi Xiang Nong Catering Management	2009	Unknown	USD43.92mln	approx.299
6	South Beauty	Dec.2008	CDH Investments/CCIG	USD43.85mln	approx.298
7	Kungfu Catering Management	Oct.2007	Capitaltoday	USD40mln	approx.292
8	C.straits Cafe	Apr.2008	Goldman Sachs/Whitesun Equity Partners	USD30mln	approx.205
9	85 °C	2009	HSBC Private Equity/Past Winners	NTD900mln	approx.190
10	Chongqing Cygnet Investment Group	Jun.2007	Sequoia Capital/SIG Asia Investment	USD20-25mln	approx.182

Source: ResearchInChina

The report analytically probes into the status quo, industrial development environment and policies concerned, financing and investments, business operation and subdivided sectors of China's chain catering industry, in an attempt to explore the market potential and give an insight into the future priority during the industrial development.

The report highlights 23 representative enterprises in the chain catering market of China, including 7 Chinese food chain companies, 6 hot-pot chain companies and 10 western food chain corporations.

China Quanjude (Group) Co., Ltd: in H1 2011, the operating revenue hit RMB803 million; in 2010, four regular chains were opened, increasing its number of regular chains to 22; in 2011, it is scheduled to open one or two regular chains and three "three-in-one" chain companies, and to start four franchising enterprises, with the target number of outlets registering one hundred in 2013.

Beijing Xiang'E Qing Co., Ltd: In 2010, the revenue from catering business made up 98.84%; in 2010, it reconstructed or expanded the outlets in Xidan, Southwest 4th Ring Road, North 4th Ring Road, Zhixinqiao Bridge, Wuhan, Dacheng Road; also, it took over or opened Shanghai outlets, Lhasa outlets, Nanjing outlets, etc in the same year. All the outlets aforementioned made contribution to its profit growth.

Xi'an Catering Co., Ltd: In H 1 2011, the revenue reached RMB308 million; the company is projected to expand its market share in Xi'an from currently around 10% to 20% or so in the future. Moreover, it plans to open three or more large and medium-sized regular chains with the floor area of 2,000-8,000 m² per year.

Kungfu Catering now boasts nearly 400 regular chains (including The ones prepared to be constructed). It is scheduled to open 800-1,000 outlets in the following three years.

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