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The Westernization of Chinese Breakfast

Report Categories:

Agricultural Situation

Dairy and Products

Dried Fruit

HRI Food Service Sector

Retail Food Sector

Product Brief

Food Processing Ingredients Sector

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Report Highlights:

Research jointly conducted by a top Chinese research institute and several land-grant universities in the US indicate that the western-style foods, in particular bread and milk, have gained popularity in China and become an important part of urban Chinese breakfasts. In the future, with further income growth, the demand for the western foods will continue to grow remarkably. As making bread requires higher protein wheat flour relative to making noodles, fried dough (“youtiao”), and steamed buns, the increasing demand for bread herein is challenging China’s wheat breeding and high-protein wheat production. A potential to rely on imports might be a solution considering China’s limited land for high-protein wheat production such as hard red winter and hard red spring, and its relatively logged wheat breeding technologies.

General Information:

Introduction

Diets in China are moving to incorporate more western-style foods, driven by economic growth, urbanization, and market liberation. Yet, few studies use microeconomic data to identify the factors driving the trends, particularly to link the rapidly changing demographics to specific western-style foods. Research jointly conducted by the Chinese Academy of Sciences, Washington State University, North Dakota State University, University of Florida, and Economic Research Service at USDA used household-level data that were collected in Beijing, Nanjing, and Chengdu in recent years to provide new insights on this issue. This report is prepared based on their findings to summarize their major results on the issue.

The data were collected through a week-long food diary approach, asking the selected households to record all the detailed food consumption by meals (breakfast, lunch, and dinner), including each ingredient prepared or eaten in the meal, no matter the meal occurred at home or away from home. The tracked food items includes each item’s name, price, purchase venue, and amount consumed for that meal, which allow us easily to identify and distinguish the western-style items from traditional Chinese diets. A full list of western style breakfasts and the observed frequency for each item are presented in Table 1.

Table 1 Observed Western Style Breakfast Items in the Survey

Category	Western-Style Foods	Households consumed western foods	% of Households over total sample size
Bread & Cake	Bread (Including sweet buns)	364	47.3%
	Cake (Including pancake and pies)	124	16.1%
	Burgers & hamburgers	14	1.8%
	Sandwich	3	0.4%
Milk	Fluid cow milk	564	73.3%
	Yogurt	95	12.4%
	Powdered milk	22	2.9%
	Cheese & butter	10	1.3%
Others	Sausage	56	7.3%
	Cereal	65	8.5%
	Soft drinks	7	0.9%
	Coffee	6	0.8%
	Juice	16	2.1%
Total		639	83%

A. Western-style Foods Have Gained Significant Popularity

Most of Western-style breakfast menu items can be found on Chinese dining tables for breakfast, and they have become increasingly popular in urban areas. In Table 1, all observed western breakfasts are grouped into three categories, including bread and cake, milk, and other western foods. Each category further includes several kinds of specific western foods. Clearly, 83 percent of surveyed households consumed at least one kind of the listed food in Table 1 during the survey week. Of which, fluid cow milk is the most popular, with 564 households reported consumption, accounting for over 70 percent of the entire sample. Following fluid cow milk are the bread and cake categories, with 47.3 percent and 16.1 percent of surveyed households reported consumption, respectively. Although less frequently consumed, it is notable that sausage, cheese, and coffee, three very western items, have been incorporated in Chinese breakfast menus.

A. Urban Households More Frequently Incorporate the Western-Style Foods in Breakfast As Income Rises

Table 2 Frequency of the Western Foods to Be Consumed In Breakfast in the Survey Week

Per capita income	Number of Breakfasts Including:			
	Bread	Milk	Others	Western
<=1,000	1.42	3.47	0.34	3.83
1,001~2,000	1.58	3.45	0.45	3.88
2,001~3,000	1.41	3.62	0.42	4.06
3,001~4,000	1.54	3.50	0.75	4.21
>4,000	2.42	3.84	1.11	4.63

On average, there were about four breakfasts out of seven (in the survey week) where at least one kind of western food was consumed for each household. Income, as expected, has a significantly positive effect. The number of breakfasts included at least one kind of western-style food is 3.83 for the lowest income group, while it increases to 4.63 for the highest income group. Similar trends can be found for bread, milk, and other western foods consumption in terms of meal number. For bread, the weekly consumption frequency for the highest income group is 2.42 breakfasts, which is one breakfast more than that for the lowest income group.

The positive income effect can also be seen in terms of per capita consumption (Figure 1).

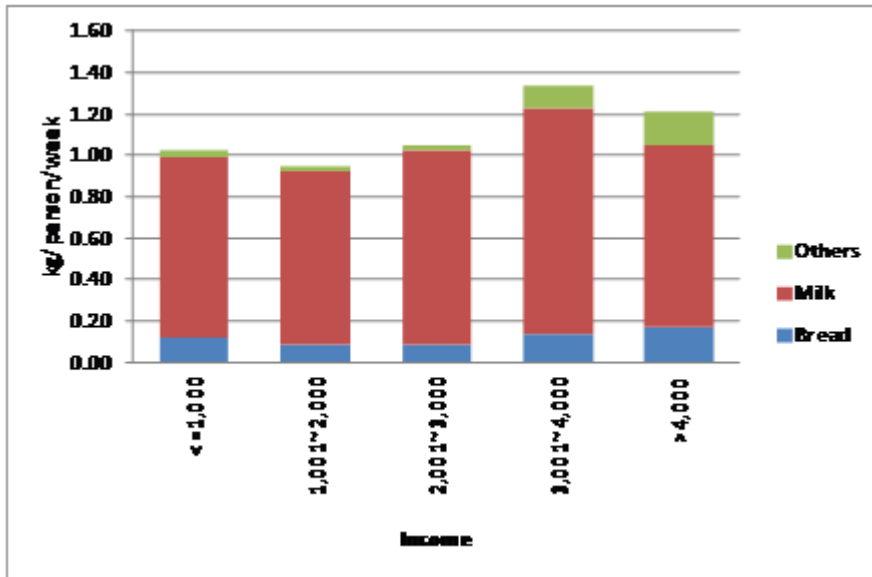


Figure 1: Per Capita Consumption of the Western-Style Foods in Survey Week

A. Western Breakfast Consumption is Significantly Related to FHH Education

The western food consumption varies by demographics, including the characteristics of the female head of household (FHH). In Figure 2, we can see that families with wives who holds college or advanced degrees more frequently incorporate western foods in breakfast than other families. It is also the case for per capita western food consumption, with 1.26kg for families with a highly-educated FHH versus 0.98kg for others.

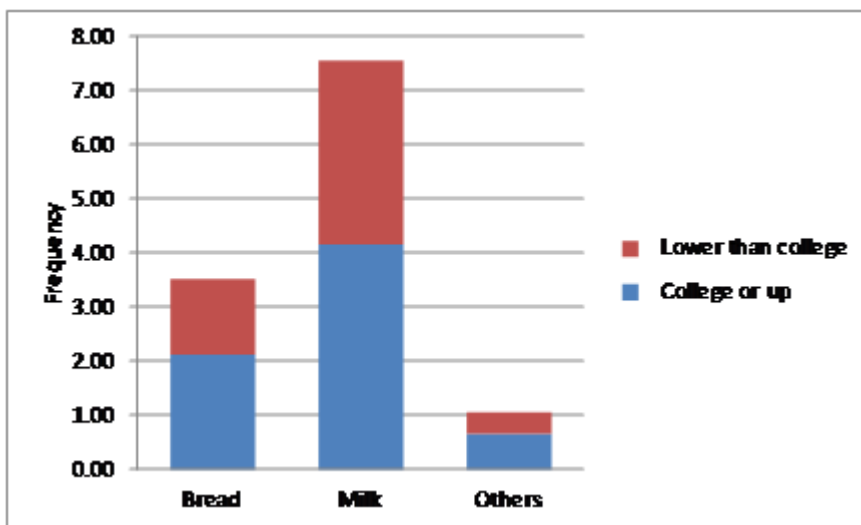


Figure 2: Wife's Education Effect on the Western-Food Choice Is Positive

A. Younger Generations are Leading the Westernization of Chinese Breakfast

Family composition also matters, but the effect differs across food types. For instance, families with children

tend to consume bread at breakfast than other families, but the difference is not that remarkable for milk and other western foods. Also, families with adolescents or young adults more frequently consume bread at breakfast than their counterparts, but families with seniors consume bread less frequently, but more frequently consume other western food products. Families with dual-career parents do not present consistent differences from single-career families.

Table 3 Effects of Family Composition on the Western Food Consumption

Family Composition	Number of Breakfasts Including:				Per capita consumption of (kg):			
	Bread	Milk	Others	Either	Bread	Milk	Others	Total
1) Family with children (<12yrs)	1.13	3.63	0.43	3.95	0.08	0.91	0.04	1.03
Family without children	1.61	3.45	0.42	3.90	0.11	0.86	0.03	1.01
2) Family with adolescent (13~22yrs)	1.70	3.60	0.39	4.06	0.13	0.83	0.03	0.99
Family without adolescent	1.43	3.45	0.44	3.86	0.10	0.89	0.04	1.02
3) Family with adult (23~55yrs)	1.55	3.50	0.42	3.92	0.11	0.86	0.03	1.00
Family without adult	1.23	3.45	0.47	3.86	0.07	0.96	0.05	1.09
4) Family with senior (55yrs or up)	1.22	3.55	0.54	3.97	0.08	0.89	0.03	1.00
Family without senior	1.73	3.45	0.33	3.87	0.13	0.86	0.03	1.02

A. Regional Effects Are Significant

Western food consumption differs remarkably across cities. Beijing is leading in consuming western foods in terms of the number of breakfasts consuming western foods. On average, there are 4.42 breakfasts including at least one type of western-style food, which leads Chengdu by 0.42 breakfast meals and Nanjing by 1.23. Similar comparisons can be found if we focus on bread, milk, and other western foods. In terms of consumption quantity, however, Chengdu takes over the leading position with per person consumption of 1.53kg, nearly double the level of Beijing (0.85kg) and Nanjing (0.79kg). It is noted that the differences across cities may not exactly reflect the regional difference as these surveys in three cities were not conducted at the same time.

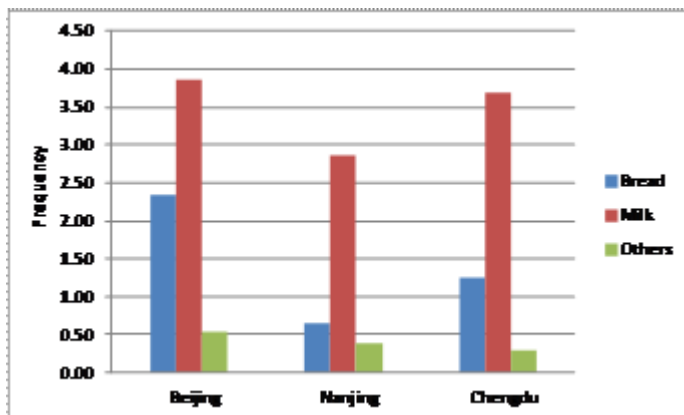


Figure 3: Western Food Consumption by City

Conclusions:

The western-style foods, in particular bread and milk, have gained popularity in China and become an

important part of urban Chinese breakfasts. In the future, with further income growth, the demand for the western foods will continue to grow remarkably. This finding has important implications for agricultural production and food processing industry. Since making bread requires higher protein wheat flour relative to making noodles, fried dough (“*youtiao*”), and steamed buns. The increasing demand for bread herein is challenging China’s wheat breeding and high-protein wheat production. A potential to rely on imports might be a solution considering China’s limited land for high-protein wheat production such as hard red winter and hard red spring, and its relatively lagged wheat breeding technologies.

Regarding milk, it is well known that the recent milk safety incidents such as melamine-contaminated baby formula have terribly damaged consumers’ confidence in consuming domestic produced milk and shocked milk production in China. The fact that Chinese consumers are demanding more milk with the growing income and health desire, however, is unchanged according to our findings from this study. Therefore, how to supply sufficient and safe milk becomes a critical question for policymakers and milk industry to pay enough attention. The western-style food consumption is also significantly related the female head of household’s education achievement and family composition. Particularly, we found that younger generations in urban household are leading the trend for westernization of Chinese breakfasts. Since people often formed their food preferences at young and will stick on when aging, the findings thereby suggests that western-style foods will be included in all age groups in the foreseeable future. Meanwhile, the FHH’s education is found to have a significantly positive effect on western food consumption, both in frequency and in consumption level. This result suggests that any effort to promote western-style foods in China’s market can increase returns by targeting the FHH.