

# Comparatively Analysis of Chinese and Foreign Coffee Brands in China: Starbucks and MANNER COFFEE

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**Abstract.** The average disposable income in China is obviously rising in recent years, leading to the increase and diversity of people's consumption behavior. More and more coffee brands are appearing in the Chinese market to segment their clients to keep up with this trend. This paper investigates the current marketing strategy of Starbucks and MANNER COFFEE using the marketing theory of the 4Ps. Also, through some comparison in data, it is obvious to find distinct development ways of these two brands. The study concluded that these two brands are conducting significantly different management models in China coffee market. Starbucks takes the advantages of its awareness and place, and MANNER COFFEE is better in product and price. To continue increasing the market share, Starbucks is suggested to explore the tier-3 and tier-4 cities and MANNER COFFEE is better to adjust the store model to match other cities, not like Shanghai. No matter using which management model, the other coffee brands in China could learn from these two brands and develop their own management strategy from the analysis approaches in this paper.

**Keywords:** Starbucks; MANNER COFFEE; Marketing Theory of 4Ps; Data Analysis.

## 1. Introduction

With the continuous improvement of people's living standards, coffee, as a western-style drink, is being accepted by more and more Chinese people. Coffee is no longer just a beverage but is gradually associated with fashion and taste, reflecting a daily habit of modern life. Since Starbucks opened its first store in Beijing in 1999, the Chinese freshly brewed coffee market has developed for more than 20 years. According to the data from iiMedia Research, the Chinese coffee market was about 387.1 billion yuan in 2021[1]. With the popularity of coffee in consumers' lives, this market has entered a period of rapid increase. In 2025, the market scale will achieve 1000 billion yuan. This potential huge coffee market has attracted many famous international coffee brands to enter China. Besides Starbucks, such as Costa and Peets, more and more foreign brands came to China to open franchising stores. At the same time, domestic brands have also grown up in the past few years to show great competitiveness, such as MANNER COFFEE and Luckin Coffee.

The marketing theory of the 4Ps is the classic theory in marketing analytics, based on the marketing mix theory. The marketing theory of 4Ps includes Product, Price, Place, and Promotion, which are seen as the basic factors of marketing. A.M. Mwabu<sup>1</sup>, in 2021, raised evidence to prove the tight relationship between product differentiation and brand loyalty. It is believed that if companies could differentiate their products from others, they can add more value to the products, making them more attractive to existing consumers and potential consumers [2]. Ivana Hustić and others pointed out that although non-price elements have been gaining significance in customers' purchase decisions, customers always follow the activities of price and will continue to follow them [3]. In 2021, Wursan and others designed questionnaires and collected the data to prove the relationship between social media promotion and purchasing decisions. They concluded that social media promotion clearly shows a positive influence on purchasing decisions [4]. Salimova, in 2021, suggested that place marketing helps meet customers' needs through manufacturers' creation of services and how products launch to customers. Furthermore, it will also influence customers' motivation to achieve the brand [5]. There are many studies on the coffee industry in China, including the whole coffee freshly brewed market and individual brands. Ran Zhu mentioned in the research on Coffee Market in China that Chinese consumers pay more attention to the attractiveness and quality of coffee. Sales and discounts make people continue returning for one brand [6]. Liu, Tang, and Wang proposed that Starbucks has

advantages of high brand awareness and huge market share, but poor customer satisfaction and service of the individual store [7]. Congzhi Zhou raised that customer engagement plays a significant role in the expedition of MANNER COFFEE [8].

However, current evidence shows that no research has explored the difference between the current situation and the future trend between foreign brands and domestic brands. The study is going to take Starbucks and Manner as examples to analyze the difference between Chinese coffee brands and foreign coffee brands in the Chinese market. This objective was achieved by comparatively analyzing Starbucks and MANNER COFFEE based on the 4Ps theory. From these comparisons, this study aims to figure out the useful methods used by Chinese and foreign brands in the process of market development, so that new brands can be used as a reference when entering China. From the marketing strategy difference of the two brands, it can also investigate the development trend of the Chinese freshly brewed coffee market.

## 2. Methodology

### 2.1 Research Design

The study is supposed to use data analysis to compare some aspects of Starbucks and Manner. Through data, it will be clear to see their differences. This project used the data from the iiMedia Research in 2021. The dataset includes the Coffee Industry Market size and forecast in China in 2020-2025, the number of stores of leading coffee brands in China in 2021, detailed surveys of Chinese consumers' habits, and so on. It is comprehensive to acknowledge the Chinese coffee market. What's more, when discussing the current positioning strategies of two brands, the marketing theory of 4Ps would also be used, helping analyze one brand's marketing strategies. This article can figure out the problems brands have, find out the solutions, and investigate the future development of two brands in the Chinese market.

### 2.2 Starbucks and MANNER COFFEE

As the leading coffee brand in China, Starbucks has developed in the Chinese market for more than 20 years. This international famous brand opened its store in the first-tier city at the beginning, then it explored the market in other cities. Considering the consumption value, Starbucks opened more stores in new tier-1 and tier-2 cities, which have developed many new coffee drinkers, exceeding the tier-1 cities. As shown in Figure 1, by the end of August 2022, Starbucks has opened 5930 stores in China [9].

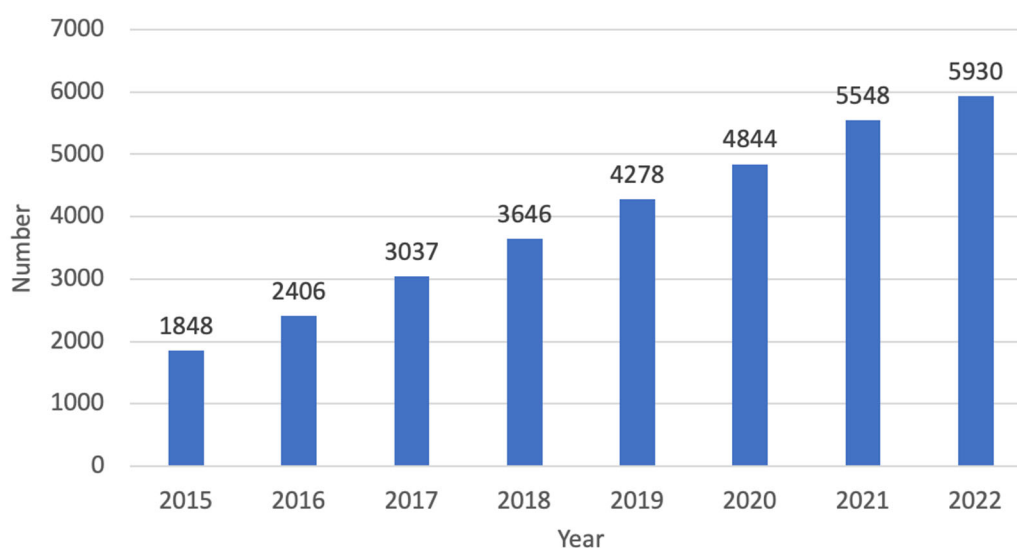


Fig. 1 Number of Starbucks stores in China from 2015 to 2022

In 2015, Han Yulong opened a 2 square-meter coffee store in Shanghai and named it MANNER COFFEE. This is where MANNER COFFEE originated from. In the past few years, MANNER COFFEE was preferred by many investors and received billions of yuan to explore its market not only in Shanghai but also in China. After receiving several hundred of million dollars from financing, MANNER COFFEE opened many stores in 2021. Shown in Figure 2, by the end of 2021, the number of offline stores of MANNER COFFEE was predicted to exceed 300; by the end of August 2022, the number achieved 477 in China. Although in terms of the number of stores, Manner is not as much as Starbucks and other brands, its fast speed of opening stores proves that Manner has a huge possibility to become a new brand with strong competitiveness. Compared to the distribution of stores in Figure 3, it is obvious that MANNER COFFEE is still exploring the tier-1 cities market, especially in Shanghai.

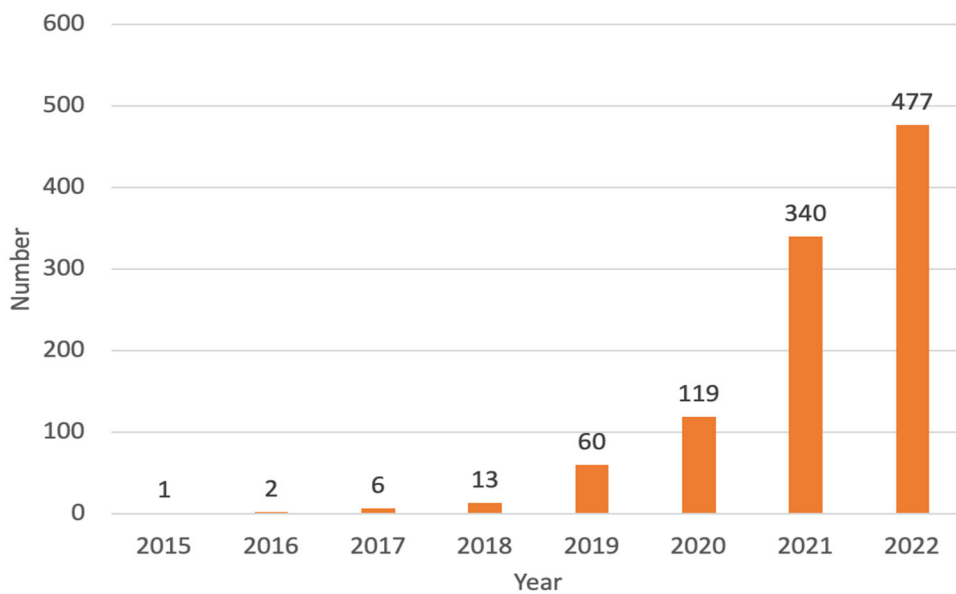


Fig. 2 Number of MANNER COFFEE stores in China from 2015 to 2022

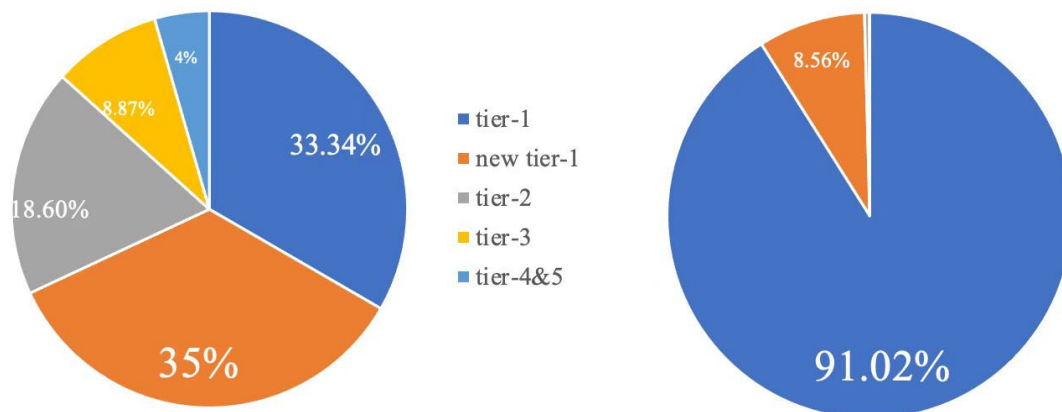


Fig. 3 Distribution of Starbucks and MANNER COFFEE in China in 2022, by city tier

### 3. Results

#### 3.1 4Ps-Product

According to the official website in China, shown in Table 1, the product matrix of Starbucks can be divided into eight parts. The main part must be the beverages. It has 28 kinds of basic beverages, including traditional coffee drinks, Frappuccino, tea drinks, and chocolate. Besides drinks, Starbucks

also offers 47 kinds of snacks, like sandwiches, cookies, and cakes. They are all shown near the counter, so when customers are buying a coffee, it is convenient for them to also choose some snacks. In addition to these, Starbucks also offers coffee-related products, including raw coffee beans, coffee cups, and other related products of Starbucks, taking up a part of the revenue of stores. Shown in Table 1, to explore the higher-price market and differentiate products, Starbucks opened some Reserve stores to provide additional pour-over coffee, which has higher quality than the normal coffee drinks [10].

**Table 1.** The product matrix of Starbucks

Store	Product	Position	Number
Normal store	Fresh brewed drink	Drinks	28
	Cake / Sandwich / Cookie / Candy	Food	47
	Coffee beans	Coffee related	10
	Cup and bottle	Coffee related	More than 10
Reserve store	Fresh brewed drink	Drinks	28
	Pour-over coffee	Drinks	6
	Cake / Sandwich / Cookie / Candy	Food	37
	Coffee beans	Coffee related	10
	Cup and bottle	Coffee related	More than 10

As for MANNER COFFEE, it shows 37 kinds of basic beverages, several seasonal drinks, and two kinds of drip coffee products. Compared with Starbucks, MANNER has no snacks in normal stores. Shown in Table 2, to explore product categories, since 2019, MANNER COFFEE opened some stores with five baking products, including toast, bagels, and sausage bread. In 2021, MANNER COFFEE opened the first MANNER CAFÉ in Shanghai. In this café, 17 simple light meals are offered. Since the café is in the busiest CBD of Shanghai, the café is welcomed by office workers who work nearby. At the same time, convenient drip coffee is also designed for customers who want to have MANNER COFFEE at home.

**Table 2.** The product matrix of MANNER COFFEE

Store	Product	Position	Number
Normal store	Fresh brewed drink	Drinks	37
	Drip coffee	Drinks	2
Baking store	Fresh brewed drink	Drinks	37
	Bread	Baking	5
	Drip coffee	Drinks	2
CAFE	Fresh brewed drink	Drinks	37
	Appetizer / Salad / Chief's recommendation	Light meals	17
	Drip coffee	Drinks	2
	Bread	Baking	5

As a coffee brand, coffee drink products must be the main products to show a brand's competitiveness. Starbucks designs three kinds of cup sizes in China: Medium, Big, and Super-big, which come from the cup sizes in America: Tall, Grande, and Venti. The capacities of the three cups are about 360ml, 480ml, and 600ml. Compared with Starbucks, MANNER uses two kinds of cup sizes: small for 237ml and big for 355ml. The big one is usually for ice drinks and the small one for hot. However, although MANNER COFFEE has a smaller cup size, it gives more coffee powder in

its drinks. The big-size drink of MANNER COFFEE contains 24g of powder per ounce. Compared to the similar size cup of Starbucks, there is only 14-18g.

Comparing these two brands, Starbucks has more kinds of products for customers to choose from. With 20 years of experience in the Chinese market, Starbucks developed in various categories to increase revenue. Besides, with a big store, Starbucks has enough space to show these products. On the contract, within a smaller store, MANNER COFFEE doesn't have enough space to do so as Starbucks, so it only has coffee in most stores. The products that update the most quickly are coffee cups. Starbucks updates the cups based on season and festival basically, like the Chinese New Year and Mid-Autumn Festival. Starbucks updates the cups every month almost. Up to now, MANNER COFFEE has its cup products in 5-6 types. As a good way of marketing, cup products could be the next important product line of MANNER COFFEE.

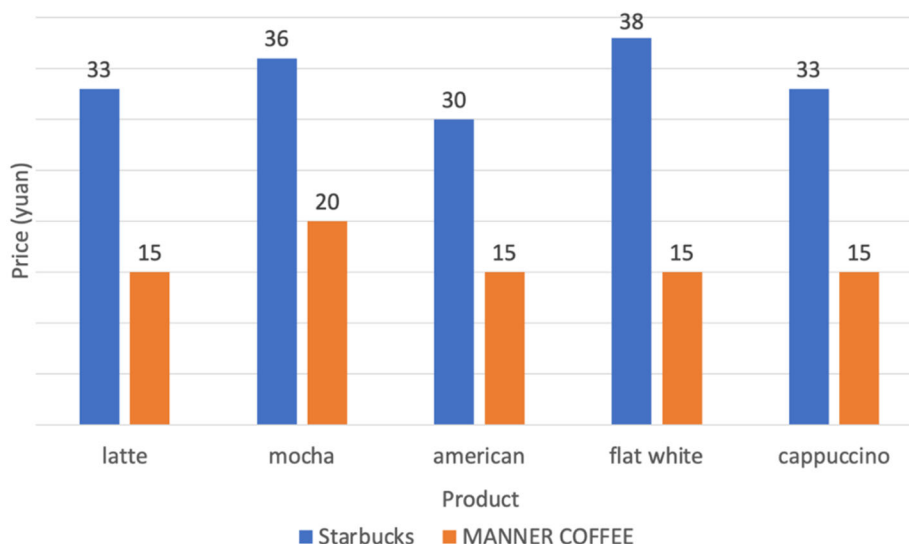
### 3.2 4Ps-Price

As the biggest coffee brand in the world, Starbucks used a premium pricing strategy in the Chinese market, where customers regard the high price provides high quality. The Grande size of drinks in Starbucks cost 30-40 yuan, and the tall size will be minus 3 yuan while the venti size plus 3 yuan. Showed in table 3, to differentiate products, Starbucks opened Starbucks Reserve to produce more high-quality and high-price coffee, like pour-over coffee, whose price will achieve 70 yuan per cup. The coffee beans sold in Reserve stores are also more expensive than in normal stores.

**Table 3.** The price of products in Starbucks

Store	Product	Price
Normal store	Fresh brewed drink	20-40
	Cake / Sandwich / Cookie / Candy	7-50
	Coffee beans	100-200
	Cup and bottle	100-300
Reserve store	Fresh brewed drink	20-40
	Pour-over coffee	35-75
	Cake / Sandwich / Cookie / Candy	7-50
	Cup and bottle	100-300

Nevertheless, MANNER COFFEE broke customers' perceptions by offering high-quality coffee drinks at lower prices. Shown in Figure 4, through a comparison of the five main products from the two brands, it is obvious that MANNER COFFEE only almost costs half of Starbucks.



**Fig 4.** The comparison of the prices of five main products

The price of baking products also shows the difference between the two brands. The snacks in Starbucks cost 15-39 yuan and the cakes are all over 30 yuan. As for MANNER COFFEE, the price of five normal baking products costs from 5 to 18 yuan, which is much lower than those in Starbucks. The pricing strategy of brands is associated with their brand positioning. For a long time, Starbucks has been committed to providing customers with the best quality coffee and service, creating a unique "Starbucks experience", and making Starbucks stores become the "third living space" for people. To make customers better experience the "third space" and make them feel at ease, Starbucks needs a larger space and comfortable tables and chairs. What's more, to make up the atmosphere, decoration is also needed to keep the brand image of Starbucks. On the contrary, MANNER COFFEE insists "Make Coffee Part of Your Life", so the store won't be a space for customers to enjoy coffee. The store of MANNER COFFEE is always 20-50 meter-square and even smaller in some subway stations and office buildings. There are almost no tables and chairs in the store, but it is convenient for people who pass by to get their coffee in the morning. Smaller stores mean less average space rent, resulting that MANNER COFFEE could provide products at a lower price.

### 3.3 4Ps-Place

As for placement, Starbucks and MANNER COFFEE implemented different location policies. To provide a coffee third space, when going to a new second or third-tier city, Starbucks also opens new stores in the main shopping mall for people in these cities to have social activities. Therefore, shown in Figure 5, many Starbucks stores are located near shopping malls, taking about 41.76% of all stores. As for MANNER COFFEE, the brand is still exploring the market in first-tier cities. To better close to its target customers, MANNER COFFEE usually chooses to open near administration buildings, taking about 54.76% of all stores [11].

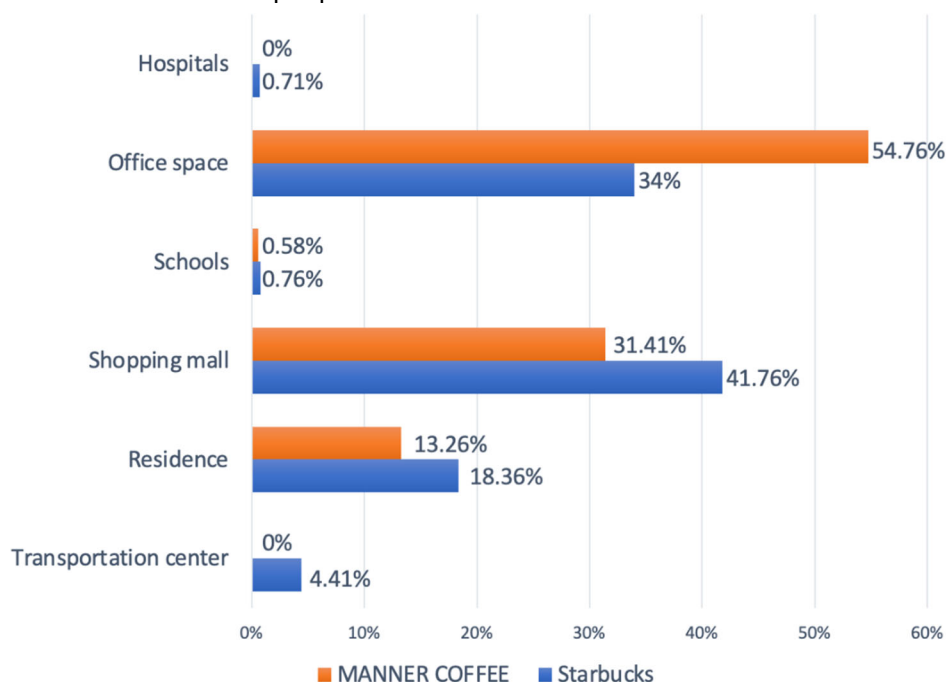


Fig. 5 The comparison of locations of two brands

These different location policies are also determined the brand positioning. As mentioned before, "the third space" means a large space for customers to enjoy coffee and socialize, shopping malls are good choices. Since after shopping, customers always choose a place to take a break and coffee shops would be a nice place. Comparably, MANNER COFFEE targets customers who drink coffee as a daily need, so convenience is their first consideration. They would prefer coffee shops near the place they work. Considering that, MANNER COFFEE is always located near office buildings or subway stations. It is convenient for office workers to take a cup of coffee away before work. This "small shop and quickly take" model is easy to be duplicated.

In addition to the offline service, the online delivery service of coffee stores is seen as a new market for brands. In 2018, Starbucks started the delivery service “Zhuanxingsong”, cooperating with one of the biggest take-out websites “ELEME”. In this app, customers will conveniently order their drinks and get them in 30 minutes to ensure the quality of coffee. At the same time, Starbucks also does its self-operated delivery service in the Starbucks app. However, only if the total price of products exceeds 80 yuan, the delivery fee can be waived, otherwise, an additional 9 yuan will be required. For customers who are used to non-delivery fees in China, Starbucks must rely on Chinese take-out websites. After cooperating with ELEME for three years, Starbucks chose another take-out website Meituan as a new partner. There is also no delivery fee for Meituan, which means customers could order coffee as conveniently as possible. Because of COVID-19, MANNER COFFEE must start its delivery service in 2022. The bottom line for delivery is 30 yuan, considering one cup of coffee costs 15 yuan in MANNER, so customers may be likely to order at least 2 cups and share with others to save the delivery fee. MANNER COFFEE also cooperates with the two biggest take-out websites ELEME and Meituan, which are covering most of the customers. In comparison, Starbucks has more stores covered many customers in China for over 20 years. MANNER COFFEE developed in recent years, so it is still a long way for the brand to explore its market in China. For the online place, the two brands both choose to rely on developed online delivery services in China, which has already accumulated billions of users.

### 3.4 4Ps-Promotion

Considering environmental protection, Starbucks started a policy in 1985 that customer could use their own cups to get coffee and get discounts. In China, using their own cups could be minus 4 yuan of product for each cup. MANNER COFFEE also gave the same policy to benefit customers that using their own cups could be minus 5 yuan. Since the average price of MANNER COFFEE is low, it is more beneficial for customers.

Besides discounts, the two brands both make efforts on stimulating consumers' purchasing desires. In 2021, Starbucks began a new promotion activity “Chasing Star Station”. During a certain range of days, customers can accumulate stars to exchange for special gifts, which are not for sale, including tote bags, mobile-phone shells, and stuffed toys. Shown in Figure 6, these products were designed within Starbucks elements and couldn't be purchased with money, so it stimulated customers to buy more products to exchange limited gifts.

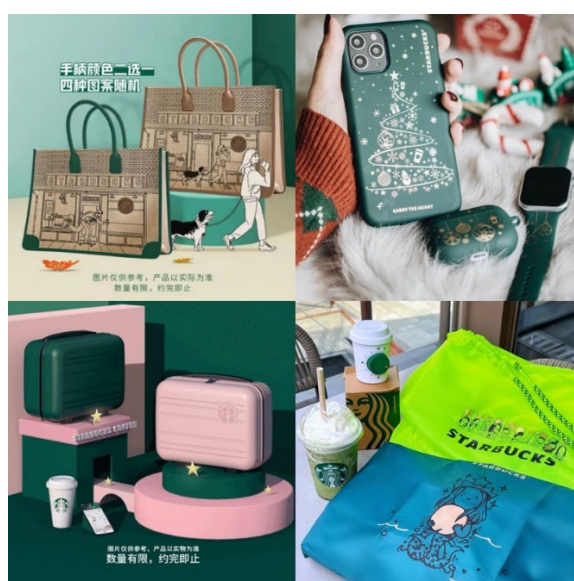


Fig. 6 Some promotion products of Starbucks

Different from Starbucks, MANNER COFFEE prefers designing brand-jointly products to make promotions. Take the recent promotion with Helena Rubinstein, a world-famous skincare brand, as

an example. The concept of this promotion is “Back to Youth with One Night”. This concept nicely matches the function of products of HR to make skin younger. To fit this concept, MANNER COFFEE designs a new product “Back to Youth with One Cup”, a new matcha latte. The green color of the matcha latte is also the same type of color as HR. During the activities, wearing green clothes or bags can get a free coffee, and buying a cup of coffee will get the sample products of HR, attracting many customers.



**Fig 7.** The special cup design for cooperation with HR

The promotion strategy of Starbucks pays more attention to its current customers. These customers have their brand loyalty and would be attracted by these limited Starbucks-related products, which could prove that they are loyal customers of this brand. For MANNER COFFEE, it is more likely to break the current customer group and draw more customers from other brands. In cooperation with HR, for customers who can't afford an expensive product of HR, it is a good approach for them to get a sample and try for only 20 yuan. It is also a way for the customers of HR to get to know MANNER COFFEE. Besides HR, MANNER COFFEE has cooperated with BEAST, NEIWAI, NIO, and many other new Chinese brands. Each of these brands is the top brand in their industry and owns many loyal customers. In conclusion, this kind of cooperation with other brands like HR could be beneficial for MANNER COFFEE to open new target markets and attract new customers.

#### 4. Discussion

According to Starbucks reports for Q3 2022, comparable store sales in China decreased from \$905.2 to \$544.5, falling by 44%, which was driven by a 43% decline in comparable customer transactions and a 1% decline in average tickets. The COVID-19-related restrictions are blamed as the primary attribute. [12] Within the restrictions, Starbucks couldn't offer the value of a “third space” for people to stay and socialize. The high price of Starbucks of course includes the right to stay in the stores. When people can't have this right, as a result, customers would prefer other brands to take the coffee away more conveniently. Besides this attribute, the other individual local coffee brands have grown up and used more fashionable designs and concepts to attract newer customers. Like Starbucks, these brands put more effort into decorating offline spaces and providing a beautiful environment for customers to enjoy and take photos. On the contract, with more stores opened offline, the sale of MANNER COFFEE on Tmall.com, the biggest Chinese online shopping website, has increased at a quick speed. In Q3 2020, the online sales were only 1.1 million yuan. However, the sales received 7.2 billion yuan in Q4 2021 in one year [13]. With the effect of COVID-19, people may be asked to self-isolate at home at any time, so it is necessary for coffee drinkers to store enough coffee beans and instant coffee at home. Considering the high price of Starbucks, the low-price MANNER COFFEE becomes many people's choice.

Through the comparison of 4P between the two brands, the strengths and weaknesses of each brand are obvious. Undoubtedly, Starbucks is the top coffee brand in the Chinese market, no matter the number of stores, city coverage, or customer base. A variety of products meet the needs of Chinese consumers for coffee drinks. In tier-2 cities with a small coffee crowd, Starbucks is usually one of the few coffee shops in the city. Because of its high popularity, Starbucks often becomes a new social place for people. Therefore, in the tier-2 and tier-3 cities in China, Starbucks has great dominance in this coffee market. However, the increasing number of stores means that the quality of the products is difficult to control. Although as a mature chain brand, maintaining high-quality coffee has always been a requirement of Starbucks. In fact, the quality of coffee in some regions may be different. Although Starbucks already has a huge consumer base, with the rise of other brands, the loss of original consumers is a problem that Starbucks must face. Promotion activities for members may increase customers' desire to buy in a short time, but frequent activities will kill the freshness of customers, and the promotion effect will be counterproductive.

To ensure the advantage of awareness, it is necessary for Starbucks to keep exploring markets in lower-tier cities. On September 14, 2022, at the biennial Investor Day conference, Starbucks claimed that by the end of 2025, the number of stores in China will achieve 9000, which means the brand will cover more cities and areas in the Chinese market. In addition to offline business, the online business also deserves more attention from Starbucks. Because of the continued impact of COVID-19 in China, takeaway services may be the first choice for consumers. At the conference, Starbucks set a goal of doubling its current performance of takeaway services. To achieve this goal, Starbucks could try more promotions in its takeaway services. For example, the delivery fee could be canceled, so that customers wouldn't pay more for their coffee. What's more, Starbucks is supposed to give more benefits to takeaway customers. Recently, to celebrate the 4th anniversary of "Zhuanxingsong", when customers order meals through Zhuanxingsong, they can pay an additional 19.9yuan to get a limited tableware set. For loyal customers, it is a good way to promote the sales of takeaway services, but for normal customers, this promotion doesn't have too much attractiveness. To better match the promotion targeting members, Starbucks aims to attract more customers to join the membership, achieving 170 million. In this way, Starbucks could get more loyal customers to implement its promotion strategies.

As for MANNER COFFEE, it provides high-quality coffee at a low price, which matches the customers who have coffee needs every day. Now the stores are concentrated in tier-1 cities, mainly Shanghai, and the target customers in China that can be covered are still a few. How to get out of Shanghai and touch more customers are the main problems faced by MANNER COFFEE. Accurate crowd positioning, simple decoration, and simplified menu are the reasons why manner can replicate more than 300 stores in Shanghai. However, when the brand tries to enter other cities, the target group of the brand will be differentiated. Compared with Shanghai, smaller cities will pay more attention to the social functions of coffee and coffee shops, which does not match the "small shop and quickly take" model that Manner is good at. MANNER COFFEE has now developed a variety of coffee drinks, but the product categories still need to be enriched. Because there is no membership mechanism, consumers don't have much brand loyalty. For consumers, these coffee products are highly replaceable.

On the one hand, to better go out of Shanghai and expand the other market, MANNER COFFEE should think carefully about new customer groups and location selection. In cities where coffee demand is not as huge as in Shanghai, MANNER COFFEE can consider paying attention to its offline decoration, creating an enjoyable atmosphere, and becoming a new local landmark coffee shop. Exquisite offline stores are still attractive to consumers and can be a suitable place for people's social life. On the other hand, building a membership mechanism is an effective way to increase brand loyalty, which can study by Starbucks. Customers could accumulate their purchases as stars and use nine stars to exchange for a free coffee, in which way customers would form habits and become the brand's customers. In addition, if MANNER COFFEE chooses to use attractive offline stores to explore new markets, the product categories should be verified. Delicious western cakes could be the

best partner with coffee drinks. With cakes and coffee, customers can better enjoy the comfortable atmosphere in the new MANNER COFFEE store.

when comparing different developing models of coffee brands, it can be found that the most important thing for Chinese coffee brands is to understand their target customers and make the right position. Based on these, brands design their products and price them. The location and promotion are also determined by brand positioning. Based on this huge customer market, no matter chooses a high-price market or a low-price market, brands could find their segmentation and provide suitable products. Starbucks and MANNER COFFEE both develop respective advantages according to their brand positioning. For other local coffee brands, they could learn from the experience of Starbucks or MANNER COFFEE. to stand out from the market, brands could consider something more unique and fashionable. For example, China is not a country with a coffee-drinking tradition. Therefore, for young consumers, the habit of drinking coffee can be cultivated. Consumers who have never drunk coffee may also be attracted by novel and fashionable shops or drinks. To attract these customers, brands could integrate Chinese elements into the coffee culture to make combinations, highlighting the differentiated characteristics of the brand.

## 5. Conclusion

This paper concluded that Starbucks and MANNER COFFEE take advantages at different aspects. As the most famous coffee brand around the world, Starbucks has the widest coverage in China and can reach many consumers, which is the biggest advantage of Starbucks. However, high pricing and unstable quality are Starbucks' weaknesses. In the future, Starbucks should continue to expand the sinking market and discover more potential consumers in tier-3 and tier-4 cities. Besides more stores, Starbucks is also supposed to pay more attention to its takeaway service. On the other hand, as a local brand, MANNER COFFEE found its clear position as a high-quality brand at a low price. Also, the location close to the office area attracts many office workers. Nowadays in Shanghai, MANNER COFFEE has become a new popular brand among young customers, but when getting out of Shanghai, MANNER COFFEE still needs a long time to be familiar with other customers. If exploring other cities' markets, MANNER COFFEE should consider its new location to match the situation. Current promotion strategies are suitable for MANNER COFFEE to attract new consumers, and it would be favorable for the brand to cooperate with more famous brands in the future.

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