

## November 2020

### Purchasing Food And Drink For Children - China

“The shrinking child population and the growing issue of childhood obesity in China is pressuring brands and companies to help parents with premiumised food and drink which accentuates naturalness, nutrient-dense, and functionality in weight management. Meanwhile, long-beloved ‘unhealthy’ food and drinks could still preserve their market share by incorporating superfoods ...

## January 2020

### Consumption Habits Of Alcoholic Drinks - China

“The unshakable leading position of baijiu does not mean the alcohol category has remained unchanged. The growth of Western spirits and the shift in purchase channels remind current players to stay vigilant. As the young generation become more important to the category, innovation answering their needs may serve as inspiration ...

### 酒精饮料的消费习惯 - China

“白酒的主导地位不可撼动，并不意味着酒品类一成不变。西方烈酒的发展和购买渠道的格局变化提醒从事该行业的企业应保持警觉。由于年轻一代对该品类越来越重要，满足该群体需求的创新或将成为进一步增长的灵感所在。”

### 酱料和调味品 - China

“该品类正处于稳定增长阶段，行业向集中化发展。品类的未来在于扩展家庭消费，并打造更多有益健康的产品。消费者健康意识的提升不仅反映在他们对于原料的敏感，也体现在烹饪习惯的改变。国外酱料不俗的渗透率意味着其在国内市场的增长潜力和跨界发展机会。”

— 吴珍妮，研究分析师

## December 2019

### Sauces and Seasonings - China

“The category is experiencing steady growth and improved in concentration. Category’s future lies in expanding household consumption as well as creating more BFY products. Consumers’ rising health consciousness is not only reflected in their sensitivity to ingredients, but also embodied in their changing cooking habits. Optimistic penetration of exotic sauces ...

### 保健品 - China

“疾病预防意识的提升和老龄人口的增加将助力保健品市场未来的增长，但消费者对于保健品效果的顾虑是品牌进一步增长的最大障碍。提供多重沟通渠道并与消费者建立更深层次的关系至关重要。利用高端成分和创新形态升级产品也有助于品牌打造竞争优势。”

- 鲁睿勋，研究分析师

## Health Supplements - China

“Continuously rising awareness of disease prevention and the expanding ageing population will ensure the future growth of the health supplements market, but consumers’ concerns about reliability and effectiveness of health supplements are the biggest obstacles to brands’ further growth. It’s important to provide various communication channels and build deeper relationships ...

## November 2019

### 软饮料趋势 - China

“对高品质和健康功能性软饮料的持续性需求是该市场在2018-2019年增速高达7.6%的关键动因。添加营养、升级加工技术保留的新鲜度和增强美容功效等‘加法’因素可能对品牌和企业保持竞争力十分重要，因为仅有一种高端特质的产品很难满足消费者。同时，天然甜味剂或代糖可以作为缓解有关糖分担忧的替代成分。”

— 徐文馨，高级分析师

### 坚果和种子 - China

“坚果和种子市场的增速放缓不应被看做是饱和的表现；相反，进一步刺激市场增长的机会在于让坚果和种子与其他食物和饮料品类更为兼容，成为其配料甚至是基底。有益健康的坚果种子是又一机会，因为它们可以满足成熟消费者目前没有被满足的需求。有益健康既可以通过‘减’（如低脂肪、低盐），也可以通过‘加’（如高蛋白、高纤维）的宣称来体现。”

## October 2019

### Soft Drink Trends - China

“The ongoing demand for premium quality and healthy, functional soft drinks is a key driver behind a 7.6% growth rate in market value from 2018 to 2019. ‘Plus’ factors such as added nutrients, freshness from upgraded processing techniques, and beauty enhancements could be critical for brands and companies to ...

### Nutrition for Pregnancy - China

“The market potential of pregnancy nutrition is promising. The concept of a more balanced and scientific approach to nutritional intake has provided the foundation for segment growth. The pregnancy nutrition market has seen the entry of multiple new players, including infant milk brands and dairy enterprises. Cultivating consumers’ trust in ...

### 果汁和果汁饮品 - China

“作为一个不断发展的市场，果汁品类的增长依赖于消费者的健康意识，并由先进的制造工艺和运输系统推动。纯果蔬汁正蚕食果汁饮品的市场份额，提示了品类高端化的发展方向。消费场景的增加和重复购买对品类增长至关重要。营养和功能性成为消费者购买的触发因素，两者也都有助于扩张果汁的消费场景。”

— 吴珍妮，研究分析师

## September 2019

### Nuts and Seeds - China

### Juice and Juice Drinks - China

## Food and Drink - China

“The slowing down of the nuts and seeds market should not be interpreted as saturation; instead, the opportunities for further stimulating growth lie in making nuts and seeds more compatible with other food and drink categories as ingredients and even bases. BFY nuts and seeds is another opportunity as they ...

“As a growing market, the juice category is led by consumers’ health consciousness and driven by advanced manufacturing and transportation techniques. Pure juice chips away at juice drinks in share and indicates the direction of premiumisation. Increasing consumption occasions or repeat purchase is critical for category growth. Nutrition and functionality ...

### 酸奶 - China

“总体来说，中国消费者更多的把酸奶看作功能性食品。尽管常温酸奶增长更快，但其处境尴尬，需找到更加合适的定位，因为消费者将会意识到其功能的局限性；而冷藏酸奶要想和常温酸奶差异化竞争，则需通过具体的功效，打造高附加值的形象。”

— 阿芳，研究分析师

## August 2019

### Yogurt - China

“Generally speaking, consumers in China regard yogurt more as a functional food. Although ambient yogurt is growing faster, it faces the dilemma of finding a suitable positioning, as consumers will realise its limitations in terms of functionality; as for chilled yogurt, to distinguish from ambient yogurt, a high added-value image ...

### 馈赠食品 - China

“高档水果、坚果和乳制品饮料在馈赠食品饮料行业中备受欢迎。与水果和牛奶相比，较少消费者选择坚果和酸奶作为赠礼。提高购买的方法之一是推出捆绑组合。此外，坚果企业可以瞄准保健品和代餐等小众市场。而且，三线城市是发展馈赠坚果和酸奶的潜力市场。”

### Gifting Foods - China

“Premium fruit, nuts, and dairy drinks have gained popularity in the gifting food/drink industry. There are fewer buyers choosing nuts and yogurt as gifts compared to fruit and milk. One way of increasing purchase is offering bundle deals of nuts and yogurt. In addition, nuts businesses could target niche ...

### 运动和能量饮料 - China

“消费者对运动健身的认知度和参与度不断提高，推动了运动和能量饮料市场的稳健增长，但随着更多的饮料包含了健康方面的功能性宣称，为了与之相抗衡，运动和能量饮料需要巩固其在定位和便利性方面的优势。”

— 李梦，研究副总监

### 预加工食品 - China

“消费者主要根据营养和原料等内在因素来衡量预加工食品的健康价值，此外，他们也关注成分表。利用上述要素来升级产品是时下的一种趋势。同时，消费者还关注较短的保质期，因此冷藏预加工食品在未来或有更好的商机，尤其是在鲜食应用软件、便利店和社区店蓬勃发展的情况下。”

### 巧克力 - China

“中国巧克力市场受益于电商发展，但仍需要更多创新。零售单价上涨有助于零售额增长，这折射出产品高端化趋势。消费者日益增长的健康意识，对巧克力质量提出更高要求。为了迎合市场和保持竞争力，品牌一直探索电商渠道，调整自身营销战略并不断创新”。

— 吴珍妮，研究分析师

## July 2019

## Food and Drink - China

### Sports and Energy Drinks - China

“Continuously growing awareness and participation of sports and fitness drive the robust growth of sports and energy drinks, but as more drinks include functionality claims related to health, sports and energy drinks need to reinforce their strength on positioning and convenience to compete against them.”

– Loris Li, Category ...

### Ready Meals - China

“Consumers evaluate the healthiness of ready meals based more on intrinsic factors, such as nutrition and ingredients; they also pay attention to labels. Upgrading products leveraging these elements is a current trend. Meanwhile, consumers are also paying attention to short shelf life, so chilled ready meals may have a better ...

### 食品饮料高端化趋势 - China

“现在大多数中国消费者将更健康的生活方式作为一大生活重心，具体表现为购买优质食品饮料产品。由于整体经济能力有所提高，消费者正在积极寻求同时满足改善健康和愉悦味蕾双重需求的高端特性，这是因为他们逐渐转变为以价值为主，而非价格。食品饮料品类的光明前景将推动企业升级生产过程中的每一步，包括采购、加工、包装和宣传。国外竞争对手推出的小众宣称和功能也可作为国内企业的灵感来源。”

### Chocolate Confectionery - China

“The Chinese chocolate market is benefiting from e-commerce but still requires more innovation. The rising price per retail unit has contributed to retail sales value growth, and reflects the trend towards product premiumisation and consumers’ increasing health consciousness, which is creating higher demands on chocolate quality. In order to cater ...

### 早餐 - China

“随着零售与餐饮服务的融合，居家早餐与外食早餐市场之间的界限逐渐模糊，并且二者都在经历着全方位的升级（如供应链、食品安全）。展望未来，随着进驻的企业日益增多，未来的早餐市场会进一步细分；竞争不再局限于现有的产品、服务和渠道中，还会来自于其他品类和其他服务类型。”

– 阿芳，研究分析师

June 2019

### Premiumisation In Food and Drink - China

“The majority of Chinese consumers are prioritising a healthier lifestyle by consuming quality food and drink products. With an overall elevated financial capability, consumers are actively seeking premium cues that can fulfil their needs to improve health as well as satisfy taste buds as they tend towards becoming value-driven rather ...

### 牛奶和调味奶 - China

“就全球范围来看，消费者的兴趣高涨使强化/添加营养的奶产品越来越受欢迎。而在中国，虽然消费者也希望尝试强化营养奶，但目前的创新重点围绕在“减少”宣称以塑造

### Breakfast Foods - China

“With the fusion of retail and foodservice, the at-home breakfast and out-of-home breakfast markets are blurring and both are experiencing upgrade on all fronts (eg supply chain, food safety). Looking ahead, the future breakfast market will be further fragmented as more players are entering; the competition is no longer limited ...

### 婴幼儿营养- 中国 - China

“虽然面临着出生率的下降，但婴幼儿营养总体市场仍然保持稳健增长，这主要得益于强烈的消费升级意愿的驱动。父母有时会纠结于不同的宝宝喂养意见，但他们不断

## Food and Drink - China

“简单”的形象。为了快人一步，制造商和品牌可以更加关注“强化”宣称（除了添加蛋白质和添加钙质），并提供针对不同消费群体的具体功效。”

— 阿芳，研究分析师

学习交流相关知识的决心非常坚定。宣称营养强化、携带方便或具备功能益处（如满足锻炼目的）的婴幼儿食品产品赢得了消费者的青睐。由于大多数父母担心宝宝没有摄入足够的营养，婴幼儿营养补充剂也表现出巨大的增长潜力。”

— 吴丝，研究分析师

### 即饮茶饮料 - China

“中国即饮茶饮料市场增长停滞不前，这是因为品类中围绕保持消费者活跃购物状态而展开的市场竞争比以往更为激烈。为了维持市场增长，品牌和企业可转向打造品牌化，让消费者更好地了解新鲜度、纯净度、功能性益处、整体健康等方面的高端特质。此外，高端萃取工艺和优质成分通过先进贮存和供应链技术得以凸显，获得了更多地区消费者的认可。”

— 徐文馨，高级研究分析师

## May 2019

### Ready-to-drink Tea - China

“The RTD tea beverage market in China is experiencing stagnant market growth due to the hurdle of keeping consumers always excited as competition in the overall drinks category is fiercer than ever. To preserve the market growth, brands and companies could look to branding which could allow consumers to better ...

### Milk and Flavoured Milk - China

“Globally, fortified/added nutrition milk products have gained rising popularity owing to consumers' high interest. Meanwhile in China, though consumers also want milk with fortified nutrition, current innovation focuses on 'minus' claims to build the 'simpleness' image. To keep ahead of the game, manufacturers and brands can pay more attention ...

### Baby Nutrition - China

“Although facing a declining birth rate, the total baby nutrition market still maintains steady growth, mostly driven by a strong desire to trade up. Just as parents are sometimes struggling with contradictory opinions on baby feeding, their determination to continue learning and sharing relevant knowledge is also strong. Baby food ...

### 乳酸菌饮料 - China

“目前，乳酸菌饮料的创新集中在功能性和添加营养。但从长远来看，随着消费者的相关知识日渐丰富，他们将认识到乳酸菌饮料在功能性方面的局限性。制造商和品牌可将乳酸菌饮料定位为‘最健康的休闲饮料’，并通过不断创新为消费者带来新鲜感。来自其他品类及餐饮品牌的新饮料产品、新元素可成为灵感来源。”

— 阿芳，研究分析师

## April 2019

### Lactobacillus Beverages - China

“Current innovation in lactobacillus drinks focuses on functional benefits and added nutrients. But in the long term, as consumers become more knowledgeable, they

### 植物性饮食- 中国 - China

“健康担忧不断增加的消费者正拥抱接受植物的力量。即便这些消费者对植物性饮食持积极的认知，他们也会偏向符合中国口味的饮食。消费者希望高端植物性饮食产品更

will realise the limitations of lactobacillus drinks in terms of functionality. Manufacturers and brands can position lactobacillus drinks as 'the healthiest casual drink' and bring novelty to ...

### 婴幼儿配方奶- 中国 - China

“在‘后注册制’时代，不达标的品牌被淘汰出局，领先品牌的市场份额进一步增加。核心产品策略让品牌能集中资源进行核心产品研发和营销，帮助成熟品牌巩固市场优势地位。

尽管出生率下滑为婴幼儿配方奶的需求量敲响了警钟，但消费者的消费升级意愿强烈，尤其热衷于寻找适合宝宝体质并添加更多强化营养的婴幼儿配方奶。有机配方奶、羊奶配方奶和特殊配方奶等高端品类未来增长前景可观。”

— 吴丝，高级研究分析师

## March 2019

### Infant Milk Formula - China

“In the post registration era, leading players are gaining bigger market share with unqualified players being squeezed out. Big SKU strategies have also helped established brands strengthen winning positions by concentrating resources on research and marketing.

Although a declining birth rate sounds alarm bells for IMF demand, willingness to trade ...

### Attitudes towards Light Meals - China

“The rise of light meals is the result of consumers' growing awareness of the importance of having a healthy diet. To attract more consumers, a light meal should contain nuts and seeds, fruit and coarse grains at the same time, and be paired with nutritious and functional soft drinks, such ...

### 55岁以上人群的饮食习惯 - China

“中国老龄人口的增长给企业带来大量创新的高质量食品和饮料方面的商机，帮助积极寻求措施提升健康状况的老年人打造营养均衡的膳食。在不远的未来，针对健康问题打造的，在数字平台渠道销售的产品可以帮助品牌和公司接触到更多受众。”

— 徐文馨，高级研究分析师，食品和饮料

具多样性的需求为该品类提供了良好的市场前景，并促使企业升级加工技术以及向市场推出新颖食材和新颖的跨子品类产品。此外，蛋白质营养功效的认知度不断提高，可以让品牌和企业有机会凭借植物蛋白的优势改革市场。”

### 对轻食的消费态度 - China

“轻食的崛起是消费者越来越认识到健康饮食的重要性的结果。为了吸引更多消费者，轻食应同时含有坚果和籽仁、水果和粗粮/谷物，并与营养的功能性软饮料搭配，如酸奶、鲜榨果蔬汁和益生菌饮料。这不仅能增强轻食的健康功效，还能带来足够的充饥效果，消除消费者的主要购买障碍——吃完轻食容易饿。”

### Plant-based Diet - China

“Consumers with growing health concerns are embracing the power of plants, and while they hold positive perceptions towards plant-based food and drink, they will lean towards diets that are curated to Chinese palates. The demand for more diverse offerings in premiumised plant-based food and drink provides a healthy market outlook ...

### 饼干 - China

“虽然消费者仍追求纵享体验，但传统饼干已不能满足新一代消费者的需求。饼干市场竞争激烈且产品同质化严重，生产商可创新饼干成分，并注重饼干的健康和新鲜，以满足消费者的需求。”

— 李润阳，研究分析师



February 2019

## Biscuits, Crackers and Cookies - China

“Even though consumers are still craving indulgence, traditional biscuits can no longer meet the needs of new generations of consumers. In a highly competitive market with high product homogeneity, biscuits producers that can provide innovative formulations while considering biscuits’ healthiness and freshness could satisfy consumer needs.”

– Bella Li ...

## 零食消费趋势 - China

“由于现在的消费者更关心零食新鲜度，‘短保’零食已进入公众视野。由于新鲜度通常表示‘不含防腐剂’，选择这一特质的消费者其实是追求‘全天然’产品。‘短保’零食的创新如今集中在烘焙产品上，但由于消费者对新鲜度的追求不断提升，‘短保’可能成为其他主要品类的新常态，因而对生产商的创新能力提出了更高要求。”

- 阿芳，研究分析师，食品和饮料

## Over-55s' Eating Habits - China

“The growing senior segment in China has opened up tremendous opportunities for companies to bring innovative, quality foods and drinks that could help seniors who are actively seeking solutions to improve their health conditions build nutritious and balanced diets. Products developed for health complications and channelled through digital platforms could ...

## Consumer Snacking Trends - China

“As consumers today are concerned more on the freshness of snacks, ‘short-shelf-life’ snacks have entered the spotlight. Consumers who opt for this attribute are actually seeking ‘all natural’ products, as freshness usually means ‘no preservatives’. Innovation in ‘short-shelf-life’ snacks now is concentrated on bakery products, but as consumers’ pursuits for ...