

January 2018

啤酒 - China

“精酿啤酒虽然没有标准定义，但在市场上日益流行。恰恰因为该细分缺乏统一定义，所以啤酒品牌无论规模大小，都可在精酿工艺和理念推广方面发挥创造性。”

— 顾菁，研究总监，食品与饮料

咖啡店 - China

“尽管部分消费者转向在家饮用更方便且优质的咖啡，如在家饮用的挂耳式咖啡和快餐店的现磨咖啡，但消费者在咖啡店内的消费呈稳步增长趋势。咖啡店可考虑丰富食物和酒精饮料选择，吸引更多消费者并扩大光顾场合。”

— 陈杨之，研究分析师

December 2017

Beer - China

“Lack of an official definition will not prevent craft beer from further proliferating in the market. Instead, this will allow market players – both small and large – to be creative crafting the product and marketing the concept.”

Coffee Houses - China

"Consumer spending at coffee houses is in a steady growth although some consumers may be switching to quality yet more convenient and value-for-money options such as in-home drip bag coffee and freshly brewed coffee from fast food restaurants. Coffee houses may consider offering more food and alcoholic drinks to attract ...

November 2017

葡萄酒 - China

“中国葡萄酒市场的零售额增长率保持低迷，但仍快于销售量的增速。中档系列葡萄酒开始流行，未来大有市场潜力——这并非意味着消费者拒绝高档葡萄酒，而是说明消费者既看重趋优购买更优质的葡萄酒，也看重其性价比。葡萄酒商和零售商更紧密无缝地合作，线上购物渠道日益流行，都促进了这一趋势的加快发展。”

— 李蕾，研究分析师

October 2017

Wine - China

“The retail value market growth remains slow but is slight faster than its volume growth. Mid-range wines are triggered and could be the next big thing. This does not mean consumers are avoiding premium wine, but means trading up for quality is as important as value-for-money from consumers' perspective. Online ...

果汁 - China

“在市场销量不断萎缩的大环境下，可持续性升级消费是保证包装果汁市场未来增长的关键。以冷压和非浓缩还原等全新形式生产的优质纯果汁已在中国市场上出现，但仍需进一步发展。无论是100%纯果汁，还是非100%纯果汁，公司和品牌都需要强调产品的健康益处。聚焦就餐场合对提升饮用频率至关重要。”

— 李蕾，研究分析师

咖啡 - China

“中国咖啡市场创新不断，更年轻一代的消费者们对咖啡更感兴趣，因此该市场将保持迅猛增长的势头。一方面，消费者看重安全性和正宗性，出于健康考虑会控制糖分的摄入量；另一方面，情感因素可以有效地带动饮用量的增加，追求纵享的消费者依然偏爱来额外成分带来的浓郁口味。国际品牌开始本地化，本土和新兴品牌表现强劲，市场竞争趋于激烈。品牌将前所未有地面临竞争浪潮中的跌宕起伏。”

— 吴丝，研究分析师

September 2017

Juice - China

“Under a shrinking volume market, sustained trading up for packaged juice is fundamental for future market growth. New interpretations of high-quality pure juice in the forms of cold-pressed and NFC have emerged in China yet still need further progress. Companies and brands may also highlight consumption benefits and not just ...

Coffee - China

“Strong growth momentum of China’s coffee market is likely to continue with blossoming innovations and rising interest from younger consumers. Consumers, on one hand attach great importance to safety and authenticity and try to limit sugar intake for health reasons, while on the other hand, emotional triggers effectively drive greater ...

August 2017

西方烈酒 - China

“相比啤酒和中国烈酒（白酒），中国消费者饮用西方烈酒的频率通常非常低。但不同种类西方烈酒的渗透率实际上并不是非常低。这一发现表明公司和品牌应重点向消费者宣传各种适合饮用西方烈酒的场合，以提高消费频率、鼓励试饮和趋优购买其他类型的酒精饮料。”

— 李蕾，研究分析师

餐饮娱乐渠道酒精饮料 - China

“在消费者对健康日益重视的大环境下，中国餐饮娱乐渠道酒精饮料市场持续走低。品牌应尝试将酒类产品与现代和健康场合相结合，以推动更多的点购。消费者不断寻求在家中无法复制的新奇体验，因此，特色自制酒精饮料可能是另一个机会点。”

— 陈杨之，研究分析师

July 2017

Western Spirits - China

“Western spirits in China generally have very low usage frequency compared to beer and Chinese spirits (ie Baijiu). However, the penetration of different types of Western spirits are actually not very low. This finding suggests companies and brands’ education should focus on telling consumers the various occasions that Western spirits ...

On-trade Alcoholic Drinks - China

“China’s on-trade alcohol market is undergoing a decline due to consumers’ rising health concerns. Brands should try to associate their alcohol products with modern and healthier occasions to encourage more orders. There can also be an opportunity for special home-made alcoholic drinks as consumers continue seeking novel experiences they cannot ...

预调酒精饮料 - China

餐饮娱乐渠道软饮料饮用趋势 - China

“经历了2016年的大幅下滑后，中国预调酒精饮料市场的销量和销售额预计在2017年将缓慢回温。导致市场大起大落的原因主要是公司和品牌太依赖市场营销，却忽略了产品本身。口味和原料应是预调酒精饮料未来创新的主要方向。女性消费者仍是主要的目标消费群体，但除了常见的果味产品外，更多的面向女性的预调酒精饮料（如采用具有健康和美容功效的独特原料制成）可能会为新品研发带来灵感。”

“餐饮娱乐渠道软饮料的核心购买动因是含有多种营养成分。水果和牛奶是受欢迎的饮料成分，所以用水果和牛奶调制的奶昔或将大有市场潜力。与此同时，餐厅和饮料生产商可以运用天然成分调制吸引消费者眼球的饮料。”

— 陈杨之，研究分析师

June 2017

RTD Alcoholic Drinks - China

“China’s RTD alcoholic drinks market is estimated to be slowly recovering in 2017 in both volume and value sales from its significant fall in 2016. Companies and brands were relying too much on marketing and ignoring the products per se, which contributed to the market’s sudden rise as well as ...

牛奶和调味奶 - China

“中国牛奶市场虽增长平缓，但远未达到饱和。巴氏奶和高端超高温灭菌奶均有地域上的扩张空间。品牌还应探索更佳方式与40-49岁中老年消费者沟通，因为目前该群体对牛奶的兴趣较低。生产商应在各种口味、成分和营养之间找到平衡，吸引年轻女性消费者，扭转调味奶的下跌趋势。”

现泡茶和即饮茶 - China

“中国消费者的健康意识不断增强，带动了现泡茶和即饮茶饮料市场销售量的增长。然而，现泡茶面临着如何吸引女性和年轻的消费者的挑战，而茶饮料的挑战来自消费者对正宗性的要求、较低的饮用频率和瓶装水和果汁等类似健康品类带来的竞争。当今市场中，消费者在居家场合饮用更多现泡茶，而在户外场合饮用更多即饮茶饮料。探索更多消费场合，突出茶或茶饮料的新鲜度和正宗性，瞄准对具体的产品功能有需求的消费者——或将助力市场未来的发展。”

— 李蕾，研究分析师

May 2017

Milk and Flavoured Milk - China

“In spite of the flat growth, China’s milk market is far from saturation. There is scope for further geographic expansion of pasteurised milk as well as premium UHT milk. Brands should also discover appropriate ways to talk to middle-aged consumers aged 40-49 who are currently less engaged with the category ...

对功能性饮料的态度 - China

“并非所有的消费者都需要高浓度和效果明显的能量补充饮料。相反，有些人可能只是需要补充轻微的能量来提升情绪。因此，单一强效型的能量饮料可能会限制品牌的消费渗透。提供较轻型的能量饮料很有机会能提高消费者的饮用频度，特别是针对目前较少饮用能量饮料的女性和年轻消费者族群。”

On-trade Soft Drinks - China

“Multiple healthy ingredients are the essential purchase driver of on-trade soft drinks. Fruit- and milk-based blended smoothie can harness an opportunity as they

Consumer Attitudes towards Functional Drinks - China

“Not all consumers need an intense and immediate energy shot. Instead, some may just need a slight energy

are the most preferred ingredients. At the same time, restaurants and beverage manufacturers may also want to utilise natural ingredients to create strong sensorial appeal to attract ...

Tea Infusions and Tea Drinks - China

“The rising health awareness of consumers in China has driven consumption increase in tea infusions and RTD tea drinks markets. However, tea infusions face the challenges of attracting women and younger consumers; tea drinks face the challenges of demand for authenticity, relatively lower consumption frequency, and threat from similar healthy ...

April 2017

瓶装水 - China

“中国瓶装水市场发展稳健，但销售额和销量增速已呈现放缓迹象。高端化以及健康水的发展仍然是驱动销售额增长的主要因素。同时，越来越多的精明消费者会在购买前证明溢价的合理性。而高质量水源与“高端”瓶装水的关系仍然最紧密，不同年龄群体对“高端”有不同的看法，因此，公司和品牌应采用相应的定位策略。出行和户外活动等饮用场合不断增多，消费者对污染的日益关注使具有健康功效的瓶装水呈现广阔前景。”

— 李蕾，研究分析师

March 2017

Bottled Water - China

“The bottled water market in China is stable yet the growing speed in value and volume sales has shown signs of a slowdown. Premiumisation, along with the development of healthy water, is still a key trend that drives value consumption. Meanwhile increasingly sophisticated consumers will look for more justifications before ...

February 2017

Plant Protein Drinks - China

Drink - China

kick to enhance their mood. Therefore, a one-size-fit all approach in energy drinks could limit a brand's consumer penetration. Lighter versions of energy drinks have good potential to increase usage, especially among ...

婴幼儿配方奶 - China

“对于顺利注册配方的领先企业，高端婴幼儿配方奶将成为其重心。顺应新兴的销售渠道将是推动业务增长的主要驱动力之一。品牌应当找到与妈妈沟通的正确方式，发现其生活中的实际需求，并以确凿证据证明其产品的优势。”

Infant Milk Formula - China

“Premium IMF products will become the focus of leading companies who complete the registration of formulas. Adapting to the evolving distribution channels will be one of the key business growth drivers. Brands should find the right way to communicate with mums, probe into their needs in real life, and provide ...

植物蛋白饮料 - China

“拓展消费场合是植物蛋白饮料未来发展的关键。除了早餐，植物蛋白饮料的饮用场合可延伸到一天中的不同时段，而厂商或品牌还可探索开发大豆或核桃等传统饮料之外的其他不同类型的植物蛋白饮料。将植物蛋白饮料打造成健康生活的一部分可能会为日益放缓的当前市场增添一种营销新触角，并有效吸引非饮用者。除了包装设计，儿童植物蛋白饮料还应在功效性和营养方面提升吸引力。”

— 李蕾，研究分析师



Drink - China

“Expanding consumption occasions is the key for PPDs’ future development. Usage of PPD can be expanded to different times of the day beyond breakfast only, while different types of PPDs beyond the traditional types such as soy or walnut drinks can also be explored and developed. Promoting PPDs consumption as ...