

February 2022

酱料、调味料和涂抹酱 - China

“由于餐饮业逐渐恢复，2021年酱料和调味料零售市场增长放缓。复合调味料细分品类保持了强劲的表现，并围绕口味和便利性持续创新，预计将对预加工食品市场构成威胁。除了与相邻品类竞争以外，品牌还可以通过菜场等传统购买渠道瞄准年轻消费者，并强调国外酱料和调味品产品的广泛用途，从而获得增长机会。”

— 殷如君，高级研究分析师

January 2022

烹饪和烘焙习惯 - China

“自新冠疫情爆发以来，消费者对健康饮食的日益重视驱使他们更常采用更健康的烹饪方式，以及保持饮食清淡。开发低/无/减钠解决方案存在机遇，其关注度目前仍不及无糖产品，以迎合消费者不断演变的口味偏好。与此同时，品牌应积极地利用数字渠道激发消费者在烹饪和烘焙上的探索欲，并强化与他们之间的情感联系。”

— 鲁睿勋，高级研究分析师

报告关键议题

奶酪 - China

“得益于儿童奶酪的流行，消费者对奶酪的认知自2014年以来有所改观。奶酪对于儿童来说仍是一种功能性食品，在补钙与补充蛋白质方面尤其如此，因此利用强化营养将有助于实现产品差异化。对于年轻消费者来说，零食化的产品形态以及风味和口感方面的创新将是未来决胜的关键。”

— 彭袁君，研究分析师

Cheese - China

“Consumers' perception of cheese has improved since 2014, thanks to the popularity of kids' cheese. For kids, cheese is still regarded more as a functional food, especially for calcium and protein supplementation, thus differentiating products by fortified nutrition will help to differentiate. For young adult consumers, snackish formats, innovations among ...

啤酒 - China

“年轻化和高端化已成为啤酒品牌的增长动力和发展方向。为使产品从竞争中脱颖而出，品牌需要瞄准不同消费群体日益细分的需求，为男性消费者推出更多纯粹的啤酒新品，为女性消费者带来更多富有想象力的口味创新。打造独树一帜的品牌形象也很重要，以使高端化和营销更具说服力和吸引力。”

— 黄梦菲，研究分析师

Sauces, Seasonings and Spreads - China

“Growth in the sauces and seasonings retail market has slowed in 2021 due to the recovering foodservice sector. The compound seasoning segment retains its robust performance and is expected to pose a threat to ready meals with continued innovations around flavours and convenience. Besides competing with adjacent categories, brands can ...

Cooking and Baking Habits - China

“The rising priority of healthy eating since the COVID-19 outbreak drives increased adoption of healthier cooking methods and lighter diets. Opportunities exist in developing low/no/reduced sodium solutions, which still receive less attention than sugar-free products, to support consumers' evolving taste preference. At the same time, brands should proactively ...

December 2021

婴幼儿辅食 - China

“尽管新生儿数量持续下降，婴幼儿辅食市场的销售额与销售量将有所增长。英敏特预测，婴幼儿辅食市场将继续保持竞争态势；因此，包装婴儿食品企业将其产品定位为家中自制餐食的快捷原料，并强调其特定健康益处而非提供多种功效，将有助于品牌赢得市场份额。婴幼儿辅食品牌也应关注草本成分，因为相比于常见的有机特征，草本成分对寻求高端产品的家长更具吸引力。”

——刘文诗，高级研究分析师

糖果 - China

“控糖方面的指导发布以及消费者的健康意识增强导致糖果的生产放缓。尽管如此，功能性糖果仍可为生产商带来商机。含天然果汁的凝胶糖果或将帮助产品脱颖而出。与此同时，风味与口感仍是消费者购买糖果时的关键考虑因素。”

November 2021

Baby Supplementary Foods - China

“The baby supplementary food market will witness growth in market value and volume despite the continuous decline in new births. Positioning packaged baby food as shortcut for home-cooked meals and providing specific health benefits rather than being multifunctional would help companies gain market share, given that Mintel predicts the market ...

Sugar Confectionery - China

“Sugar confectionery production has slowed down due to sugar control guidance and consumers’ increased health consciousness. Nevertheless, functional candy offers potential for manufacturers to tap into. Jelly candy with natural fruit juice may help products stand out. Meanwhile, flavours and mouthfeel are still key factors for consumers when it comes ...

Cooking Oils - China

“The retail value of cooking oil continues growth momentum in the post-pandemic era thanks to the rising oil prices. However, the long-term growth is expected to slow down as the consumption of oil has been declining with consumers eating out occasions increases. To sustain the value growth, brands should tailor ...

配方奶 - China

“虽然新生儿数量下滑的情况难以逆转，但婴幼儿配方奶品牌仍有机会通过聚焦成长配方奶品类的高端产品创新，以及侧重针对特定健康功能（如对肠道友好、促进身体发育和助眠等功效）的营养强化以保障营收。婴幼儿配方奶品牌可发掘“个性化营养”领域的潜力，以进一步提升差异性和竞争力，进而赢得更多市场份额。”

宠物食品 - China

[graphic:]

October 2021

Pet Food - China

“People’s willingness to own pets in the post-COVID-19 period is increasing, especially among younger and older generations, stimulating a boom in the pet food market. There has been a surge in new starter pet owners asking for easy-to-follow and professional guidance, while experienced pet owners are seeking more refined feeding ...

September 2021

酸奶 - China

“常温酸奶的增速持续超越冷藏酸奶，但也同时面临冷藏饮用型酸奶的威胁，尤其是带有高蛋白质宣称的产品。帮助消化依然是最主要的消费目的，而对其他功能性和纵享属性的需求则因消费群体而异。消费习惯和消费目的的差异表明，酸奶品牌需针对不同价位的商品区分功能性和纵享定位。”

— 殷如君，高级研究分析师

包装烘焙食品 - China

“消费者对包装烘焙产品的营养特点抱有浓厚的兴趣，尤其是它们的新鲜度、营养价值及成分。包装烘焙产品将来越细分化，以满足特定消费群体的不同健康需求。对儿童健康及体重管理的需求大大影响消费者对包装烘焙产品的偏好及选择。进一步专业化以满足消费者日益具体和独特需求可填补市场机遇。”

— 黄梦菲，研究分析师

August 2021

Yogurt - China

“The growth of ambient yogurt continues to outpace chilled yogurt, but it is facing a threat from chilled drinking yogurt, especially those products with high protein claims. Digestion improvement remains the top consumption purpose while the need for other functions and indulgence varies across consumer groups. The divergence in consumers’ ...

代餐 - China

“不断扩大的超重人口和日益增加的健康问题为功能性代餐创造了商机。随着健康意识不断提高，该类产品有机会帮助消费者管理体重和健康问题。新冠疫情爆发之后，消费者更重视健康饮食。代餐也有机会通过更灵活和多样的产品形态，关注功能性以外的需求，以现代解决方案的形式融入到日常饮食。”

— 鲁睿勋，高级研究分析师

Packaged Bakery Foods - China

“Consumers have a great interest in the healthy attributes of packaged bakery products, especially in their freshness, nutrition, and ingredients. Packaged bakery products will be increasingly segmented according to different wellbeing needs for specific consumer groups. The demand for children’s health and weight management significantly impacts consumers’ preferences and selection ...

预加工食品 - China

“新冠疫情防控得当，使得速冻食品品类增长趋于平稳，冷藏食品品类逐渐复苏。传统预加工食品市场将受益于食品的营养强化以及明确的消费场景。随着社会老龄化，针对老年人设计的特殊营养食品需求量将会增加。消费者追求更便利有趣的烹饪体验以及更好的用餐过程，这将促使预制菜品类加码产品创新。”

——彭袁君，研究分析师

Meal Replacements - China

“An increasing overweight population and the growing prevalence of health issues create opportunities for functional meal replacements which can help consumers

Ready Meals - China

“Better control over the COVID-19 epidemic has seen growth stabilise in the frozen sector and a recovery in the chilled segment. The conventional ready meals

Food - China

manage weight as well as health issues in light of increasing health awareness. With a high priority on healthy eating after the COVID-19 outbreak, meal replacements also have the ...

冰淇淋 - China

“疫情爆发后，包装冰淇淋受益于居家消费量的增加以及线上和新零售渠道带来的产品可获得性的提高。除清凉降温之外的多样食用场景，意味着品牌有机会增强冰淇淋作为居家零食和慰藉食品的角色，从而打破消费的季节性限制。植物基和有益健康的产品可以帮助品牌将其受众群体进一步扩大到关注健康的消费者。”

— 鲁睿勋，高级研究分析师

market will benefit from fortified nutrition and clear consumption occasions. As society ages, there will be demand for products with specialised nutrition designed for seniors ...

植物基食品 - China

“由于消费者对健康饮食的认识和需求不断提高，植物肉市场日渐增长。对植物肉了解有限及对传统大豆肉的认知可能会阻碍消费者尝新的兴趣，但持续的营销教育和产品创新有望推动未来的市场增长。”

— 顾菁，品类总监

July 2021

Ice Cream - China

“Packaged ice cream benefits from rising in-home consumption after the COVID-19 outbreak, aided by growing product availability from online and New Retail channels. Various consumption occasions beyond chilling out indicate the opportunity to strengthen the role of ice cream as an in-home snack and comfort food to break the seasonal ...

早餐 - China

“新冠疫情对早餐市场的冲击主要集中在外食早餐场景。但疫情促进了居家早餐消费的增长，进而培养了寻求营养均衡和新鲜食材的消费者。消费者追求区域风味的新诉求带来了外食早餐品类产品创新压力，而居家早餐市场将从更快捷、健康和小份量的早餐解决方案中获益。”

— 彭袁君，研究分析师

零食消费趋势 - China

“2020年居家食品消费增长，零食销量从中受益。未来，零食与正餐将会持续融合，食用场合更加多元，推动零食销量增长。在产品高端化的诉求中，原料更加健康最受青睐。由此可见，要在口味至上的品类中提升健康感，原料故事依然最能直接打动消费者。”

— 蒋安妮，食品与饮料研究分析师

June 2021

Plant-based Food - China

“The plant-based meat market is growing, driven by consumers' increasing awareness of and needs for a healthy diet. Although limited familiarity and previous perceptions of traditional soy meat may hinder consumers' interest in trying, continuous marketing education and product innovation are expected to support future market growth.”

Breakfast Foods - China

“COVID has hit the breakfast market mostly on out-of-home occasions, but grown in-home consumptions that breed consumers seeking for balanced nutrition and fresh ingredients. The new consumer aspiration of regional taste also puts pressure on product innovation for the out-of-home sector, while in-home market will benefit from quicker, healthier and ...

Food - China

茶饮料 - China

“不同形态的茶饮料受疫情的影响有所不同，即饮茶饮料细分市场面临着户外消费限制所带来的挑战，由于人们宅家时间增加，现泡茶的消费量却有所提高。茶饮料企业借鉴了速溶咖啡市场的成功经验，呈现出高端化消费趋势。为满足女性饮茶者对解压和美容的消费需求，茶饮料市场也迎来了功能性创新。”

— 李泓佳，品类总监

牛奶和乳饮料 - China

“消费者的需求不断增加和消费场景的日益拓展，使牛奶和乳制品饮料无论是在该本市场内还是在更大范围的休闲饮料市场都具有增长潜力。冷藏牛奶可突出宣传营养价值高于常温牛奶和常温酸奶，以获得更大增长。由于乳制品自带健康光环，加之消费者对肠道健康明星成分（如乳酸菌）的认识更加广泛，品牌向更广饮料市场的进军之路将更为顺畅。”

— 彭袁君，研究分析师

肉类零食 - China

“相比零食总品类，肉类零食的增长潜力更高。肉类零食的消费很大程度上由解馋驱动。然而，当前市场新品大多主打健康宣称，并未关注解馋需求。鉴于该市场竞争激烈，新入局者可通过聚焦某一特定的子细分打造竞争优势。儿童零食领域对食品安全和品牌信誉要求更高，这对儿童营养的专业品牌而言是品类拓展的机遇。”

— 赵凌波，高级研究分析师

方便食品 - China

“方便面不再是为了充饥万不得已的选择。技术进步带来的产品升级帮助方便面摆脱没有营养的负面形象，并清除消费障碍。拥有全新形象的方便食品将在便利的基础上更好地满足消费者更多元的饮食需求，并且成为餐饮品牌提供“无界餐饮”的理想形式。”

— 鲁睿勋，研究分析师

May 2021

Tea Drinks - China

“Tea drinks of different formats have experienced the pandemic differently, with the RTD segment facing challenges posed by limits on out-of-home consumption, while tea infusions enjoyed an uplift thanks to the increased time spent at home. Successful practices have been borrowed from the instant coffee market, precipitating a premiumised consumption ...

Milk and Dairy Beverages - China

“Consumers' increasing needs and expansion in consumption occasions give milk and dairy beverages market growth potential both within the market and from bigger casual drinks market. Chilled milk will benefit from highlighting its nutrition advantages over ambient milk and ambient yogurt. While health halo of dairy and wider awareness of ...

April 2021

Meat Snacks - China

“Meat snacks enjoy higher growth potential in total snack category. Consumption is considerably driven by food craving. However, this factor is not sufficiently addressed in current new product launches which mainly feature healthy claims. While the market is highly competitive, new entrants can consider focusing on very specific sub-segments to ...

Instant Foods - China

“Instant noodles are no longer the last resort for satisfying hunger. Product upgrades thanks to technological improvements help instant noodles cast aside the negative image of being low in nutrition and overcome consumption barriers. Updated perceptions of instant foods will grant them more important roles in satisfying consumers' diversified dietary ...

节庆食品 - China

“新冠疫情的蔓延加快了电子商务在低线城市的扩张。随着传统文化逐渐复兴，地方品牌将从发展成熟的电子商务和地方文化中受益匪浅。长远来看，如何使节庆食品变得更新奇有趣是品牌将长期面临的重要任务。技术或许是达到这一目标的有效工具。同时，环境友好的包装也会纳入健康节庆食品的宣称范围中，因为消费者日趋拥抱全面的健康理念——健康不再局限于产品的可食用部分。”

— 彭袁君，研究分析师

March 2021

Consumer Snacking Trends - China

“Snack sales have benefited from increased in-home food consumption in 2020 and future growth will be driven by more diversified consumption occasions as the boundaries of snacks and meals continue to blur. Healthier ingredients have become the most wanted premium feature, suggesting ingredient stories are still the most intuitive ...

Festive Foods - China

“Due to the epidemic, e-commerce has expanded faster in lower tier cities and along with the revival of traditional culture, regional brands will benefit a lot from mature e-commerce and regional culture. In the long term, how to make festive foods fun and novel will be an important, ongoing task ...