

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

糖果 - China

“糖果市场的销售额终于出现反弹，但销量仍在下滑，原因在于越来越多的消费者降低吃糖果频率，或转向邻近品类或其他零食。

消费者零散的个人消费或送礼需求形成一种分散的竞争格局。无论品牌大小，糖果公司仍有机会通过以下方式提高竞争优势：强化健康功效和通过传达更多的互动体验增强情感依恋。”

— 吴丝，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.”

Sugar Confectionery - China

“The sugar confectionery market has finally regained resilience in retail value, though volume sales are still in decline as more health-conscious consumers are cutting down consumption frequency or switching to adjacent categories or other snacks.

Consumers’ scattered needs for either personal consumption or gifting speak volumes for the fragmented competition ...

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

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

婴幼儿辅食 - China

Food and Drink - 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

“婴幼儿饼干和零食是深受父母喜欢的婴幼儿辅食种类，使其成为吸引潜在用户的理想入门产品。强调包装婴幼儿食品的天然性举足轻重，而有助培养宝宝技能的产品对4-6个月的宝宝至关重要。”

— 倪倩雯，食品和饮料研究分析师

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 ...

酸奶 - China

“领先的公司持续投资常温酸奶，在所有类型的酸奶或酸奶饮料中，该品类的渗透率最高。为了进一步提高消费频率，品牌正在寻求新方式，以创建与特定场合的关联性。虽然有益健康是终极趋势，但酸奶品牌仍需注重口味享受”。

— 倪倩雯，研究分析师:食品和饮料

August 2017

Yogurt - China

“Leading companies keep investing in ambient yogurt, which has the highest penetration among all types of yogurt or yogurt drinks. To further increase consumption frequency, brands are looking for new approaches to build association with certain occasions. Though better-for-you is the ultimate trend, yogurt brands should not take away all ...

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

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

速冻预加工食品 - China

“食品外送服务满足了消费者对食物多样性和便利性的需求，加之中国消费者对营养成分的了解越来越多，更乐于探索产品新种类。因此，消费者开始出于不同需求食用速冻预加工食品，并扩充新的食用场合。”

Frozen Ready Meals - China

“With needs for convenience and variety well catered for by food delivery services, and Chinese consumers becoming more nutritionally savvy and open to exploring product varieties, frozen ready meals are being consumed for different reasons and on new occasions.”

冰淇淋 - China

“来自非零售渠道的挑战迫使冰淇淋生产商通过强调天然和成分真实为市场注入更多新鲜刺激。与此同时，消费者也仍然看重纵享时刻，因此这方面不能妥协折扣。冰淇淋有机会成为心情食品溢价销售，舒缓年轻一代的紧张生活。”

Food and Drink - China

drinks as consumers continue seeking novel experiences they cannot ...

— 倪倩雯，食品和饮料研究分析师

预调酒精饮料 - 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。”

巧克力 - China

“中国消费者吃巧克力主要是为了提升心情，而不是当作零食，因此，推出更像零食的巧克力应会增加消费量。厂商可在巧克力中添加坚果、水果干或膨化谷物等消费者喜爱的健康零食食品，这种方法不仅能丰富产品口味和带来健康益处，而且也能天然降低巧克力的脂肪和糖含量（这两方面是消费者的主要顾虑）。”

— 杨晴，高级研究分析师

早餐 - China

消费者越来越倾向于在外面吃早餐，方便、性价比高和早餐种类多样的便利店尤其受欢迎。其他售卖早餐的场所可通过提供更多的每日特惠早餐来提高竞争力。同时，消费者习惯于吃中式早餐，外国企业可考虑在流行的西式早餐食品中添加中式养生食材或口味，以提高吸引力。”

餐饮娱乐渠道软饮料饮用趋势 - China

“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

Ice Cream - China

“The challenges from non-retail channels urge ice cream manufacturers to bring more excitement, by emphasising naturalness and authenticity. In the meantime, consumers are still looking for indulgence, which should not be compromised. There is scope for ice cream as a mood food with a premium price, to sooth the stressful ...

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 ...

Chocolate Confectionery - China

“Chinese consumers primarily consume chocolate to enhance the mood rather than as a snack, so making chocolate more snack-like should potentially expand the usage. Manufacturers can include popular healthy snack foods such as nuts, dried fruits, or puffed grains to not only add flavour and health benefits to the product ...

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

Breakfast Foods - China

“Consumers are shifting to out-of-home breakfast venues, especially convenience stores, which offer convenience, value for money and a variety of choices. Other out-of-home breakfast venues can offer more daily specials to improve their competitiveness. At the same time, consumers are sticking to Chinese foods at breakfast, and international players should ...

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。”

Consumer Attitudes towards Functional Drinks - China

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

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 ...

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 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

Food and Drink - China

饼干 - China

“消费者食用饼干的主要原因是放纵味蕾、纵享美味,而中国消费者眼中的享受型饼干并不是厚重甜腻的,而应该是酥脆清爽、口味和质地有丰富的层次感,以及适合搭配饮料一起吃。”

— 杨晴,高级研究分析师

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

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 ...

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 ...

Biscuits, Cookies and Crackers - China

“Indulgence has been a main driver of biscuit consumption. Rather than a piece of heavy and intensively sweet biscuit, Chinese consumers define indulgence as lighter bites that are crispy, with multiple flavour and texture experiences, and are suitable to pair with their drinks.”

方便面 - China

“人口特征的变化正在改变着方便面主要消费群体的构成。方便面类别因此面临着巨大挑战。生产商应采取行动,回应消费者需求的升级,以维持竞争力。企业采取多品牌战略和明确的品牌定位,有助于精确定位目标客户,提升消费者对品牌的忠诚度。”

February 2017

Plant Protein Drinks - 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

零食消费趋势 - China

“消费者对高蛋白零食的浓厚兴趣使肉类零食在去年成为全球零食市场上的新宠。几百年来,肉类零食都是中国传统零食的一部分,但很少被定位为高蛋白零食。厂商和品

such as soy or walnut drinks can also be explored and developed. Promoting PPDs consumption as ...

牌可能有机会利用蛋白含量和食用方便的特征来重新定位这一深受市场欢迎但仍缺乏创新的零食品类。”

Instant Noodles - China

“The instant noodle category is facing great challenges as demographic changes are reshaping the main consumer group of the category. Manufacturers should take action and respond to consumers’ upgraded needs to stay competitive. A multi-brand strategy and clear positioning will enable more precise targeting and strengthen brand loyalty.”

— ...

January 2017

Consumer Snacking Trends - China

“Globally, meat-based snacks have moved into the spotlight in the last year owing to consumers’ high interests in protein-rich snacks. The category has been a part of traditional Chinese snacks for centuries but has rarely been positioned as a high-protein snack. Featuring its protein level and making them more convenient ...