

January 2022

白酒 - China

“由于中国白酒领先品牌获得越来越多市场份额，该市场正趋向集中化。然而，消费者对白酒的刻板印象，以及市场上琳琅满目的酒精饮料选择将影响白酒的未来市场增长。在消费升级的浪潮下，白酒品牌不仅需要抓住消费者不断提升的健康意识，推出更健康的选择，也要回应他们对附加价值的需求，例如可持续性和平等性。”

— 张辰钰，高级研究分析师

Beer - China

“Rejuvenation and premiumisation have been the growth engines and development directions of beer brands. To differentiate products from the competition, brands need to target the increasingly segmented demands of different consumer groups, with more purist beer launches for males and more imaginative flavour innovation for females. Building a distinctive brand ...

December 2021

西方烈酒 - China

后疫情时期，烈酒市场正在以前所未有的速度复苏，消费者的饮酒意愿受两大因素驱动——一是居家防疫之后的补偿性消费；二是紧跟流行的生活方式。消费者正在拥抱多种饮用场合，企业可以借此推出更加大胆的创新口味和创意推广活动，从而吸引新的消费者。同时，尽管白兰地和威士忌在中国市场的发展历史较长，但琴酒/金酒凭借其独特性，成为了中国市场上冉冉升起的一颗新星。”

Chinese Spirits - China

“The Chinese spirits market is moving towards centralisation, with leading brands gaining ever greater value share. However, consumers’ exposure to a plethora of alcoholic beverage options and stereotypes about baijiu will impact future market growth. Chinese spirits brands should not only capture rising health consciousness by providing healthy alternatives, but ...

速溶，挂耳，胶囊咖啡 - China

“速溶咖啡是许多消费者‘第一杯咖啡’的启蒙选择，在中国咖啡消费中扮演重要角色。围绕风味和形态的产品升级可满足消费者不断演变的需求，并为该品类注入活力。品牌可主动帮助消费者保持自新冠疫情以来培养的居家消费习惯，并通过创新风味和有趣的调配方式创造新的饮用场景。同时，随着消费者对环境问题愈发关注，品牌需在推出新颖包装之余减少对环境的影响，并树立道德品牌形象。”

— 鲁睿勋，高级研究分析师

November 2021

Western Spirits - China

“The spirit market is recovering with unprecedented speed after the pandemic, consumers’ willingness to drink is driven by not only post-lockdown compensatory spending but also by ever adapted trendy lifestyle. Consumers are embracing multiple drinking occasions, which provide companies opportunities to go bolder in both flavour innovation and creative engaging ...

Instant, Drip Bag and Pod Coffee - China

“Instant coffee, being as the first cup of coffee among many consumers, has an important role in China’s coffee consumption. Product upgrades around flavour and format help rejuvenate the category by satisfying consumers’ evolving needs. Brands can proactively help consumers sustain their in-home habits since the COVID-19 outbreak as well ...

气泡饮料 - China

“在气泡水的持续走热后，气泡饮料被无糖、低/无/减卡路里和低/无/减脂的宣称重新定义。但新品中‘减少’类宣称的盛行也导致产品同质化加剧。品牌应迎合消费者在疫情之后的新消费习惯，提升他们的居家体验，围绕营养功效和低甜度进行创新，寻求突破。”

功能性饮料 - China

“与运动和能量饮料挂钩的传统功能性饮料正逐步从疫情中恢复。工作和生活压力加剧推动了对提神和缓解疲劳的需求，但持续的不确定性也对关键户外消费场合构成威胁。此外，消费者一方面对添加剂及传统功能性饮料的潜在副作用表示担忧，而另一方面他们也要求特定的功能性解决方案（如美容养颜和增强免疫力）。这给产品创新带来压力，但也为那些凭借天然成分赢得消费者青睐的非传统企业提供进入市场的机会。”

— 黄梦菲，研究分析师

October 2021

Infant Milk Formula - China

“Although the decline of new births is hard to reverse, IMF brands still have chances to secure revenue with premium product innovations in the growing-up milk formula sector in particular, with a focus on upgraded nutrition compositions targeting specific health functions such as gut-friendliness, body development and sleep benefits. "Personalised ...

即饮咖啡 - China

“即饮咖啡市场预计将快速复苏，并在未来5年间继续保持两位数的增长。然而，该市场也面临着来自速溶与现磨咖啡品类的威胁。若要与时俱进，品牌应迎头赶上植物基潮流，并持续为口味创新进行投资。与此同时，品牌也有必要推广即饮咖啡产品除提神效果以外的功能性优势，以区别于其他类型的咖啡。”

— 殷如君，高级研究分析师

RTD Coffee - China

“The RTD coffee market is expected to recover quickly and continue a double-digit growth momentum in the next five years. However, it faces threats from instant and freshly made coffee. To stay relevant, brands should catch up with the plant-based trend and continue investment in flavour innovations. At the same ...

Sparkling Drinks - China

“Sparkling drinks have been refined with sugar-free, low/no/reduced calorie and fat claims following the growing popularity of sparkling water. However, the prevalence of these minus claims in new products also results in increasing homogeneity. Brands should support consumers' new consumption habits after COVID-19 by elevating their in-home experiences ...

September 2021

Functional Drinks - China

“Conventional functional drinks associated with sports drinks and energy drinks are recovering slowly from the pandemic, with increasing work-life pressure boosting demand for energising and fatigue relief, while persistent uncertainties pose a threat to key outdoor consumption occasions. In addition, consumers show concern about additives and potential side effects of ...

July 2021

早餐 - China

植物基饮料 - 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

“植物基饮料市场预计将迅速反弹至疫情前的水平，但从长远来看，仍将缓慢增长。为了在激烈的竞争中脱颖而出，品牌应该加快产品创新的步伐，以服务于消费者不同的细分需求。品牌还可以将植物基概念扩展到其他饮料品类，以拓宽消费场合并促进零售额增长。”

— 殷如君，高级研究分析师

June 2021

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 ...

Plant-based Drinks - China

“The plant-based drinks market is expected to bounce back quickly to pre-pandemic levels but growth will remain slow in the long run. To stand out amid intense competition, brands should accelerate the pace of their product innovation to serve different need spaces. They could also expand into other beverage categories ...

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

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

跨界饮料 - China

“茶饮店和咖啡店层出不穷的创新‘惯坏了’消费者的味蕾。在这样的背景下，通过跨界来提升风味以外的饮用体验对于推动非酒精饮料行业的增长非常重要。消费者对健康饮食的重视，不仅会推动对高营养价值的需求，也让消费者对不健康成分的摄入更加谨慎。重新定义健康的升级产品将有助于实现差异化，并让包装产品的形象焕然一新。”

— 鲁睿勋，研究分析师

March 2021

Beverage Blurring - China

“Facing with consumers’ spoiled taste as a result of continuous innovation from tea and coffee houses, enhancing overall consumption experience beyond flavour with the assistance of blurring will be important in driving the growth in non-alcoholic drinks sector. Rising priorities of healthy eating not only contribute to the demand of ...