

March 2021

食用油 - China

“受新冠疫情影响，消费者对食用油的需求不断提升。消费者的用餐习惯从外出就餐变为在家烹饪，这一趋势显著加速了食用油零售市场的增长。在选购食用油时，消费者特别关注营养，并且会经常更换不同种类的食用油。因此，品牌应优化自己的产品组合，通过提供更健康的油种，和改良的传统油种产品，满足消费者的消费升级需求。随着健康饮食越来越受重视，消费者在食用油的消费上将会持更为谨慎的态度。因此，品牌有必要迎合消费者烹饪习惯的变化，与健康饮食建立联系，倡导更健康的消费方式。”

— 鲁睿勋，研究分析师

February 2021

奶酪 - China

“奶酪市场尽管基数较小，但将继续其增长轨迹，成为增长最快的乳制品品类。品牌可扩展奶酪的产品形式，将其置于更广的零食品类竞争之中，更加瞄准成人消费者，而不是仅仅注重其营养价值。与餐饮渠道的餐厅合作可以向非奶酪消费者推广新的食用方式，培养更强的烹饪和烘焙习惯。”

— 蒋安妮，研究分析师，食品与饮料

烹饪和烘焙习惯 - China

“新冠疫情导致人们从外出用餐转变为居家烹饪和烘焙。大多数过去不负责做饭的18-24岁年轻消费者也步入厨房，并在后新冠疫情时代保持了烹饪习惯。预制菜和复合调味料包可瞄准这些更加被便利驱动的新兴烹饪人群。健康饮食越来越重要，这也指明了推出更有益健康的酱料和调味料的市场机会，以帮助消费者更健康地烹饪和饮食。此外，随着许多消费者把烹饪和烘焙当做家庭或休闲活动，营销烹饪产品和厨房电器时，乐趣和愉悦的体验值得特别关注。”

— 鲁睿勋，研究分析师

January 2021

Cooking Oils - China

酱料、调味料和涂抹酱 - China

“得益于居家烹饪频率的提高，酱料、调味料和涂抹酱市场预计在新冠疫情后将保持稳定增长。各细分的零售额都将增长，领先品牌将占领更多市场份额，市场集中度更高。消费者的用餐习惯不断改变，而且健康意识不断提高，将促进渠道多样性和产品形态创新。”

— 徐如一，北亚区报告总监

Sauces, Seasonings and Spreads - China

Food - China

“The COVID-19 outbreak has raised the demand for cooking oil as part of the shift from dining out to cooking at home, which has accelerated the growth in the retail market of cooking oil. Consumers’ special attention to nutrients and tendency to switch between oil types indicates that brands should ...

婴幼儿营养 - China

“虽然出生率持续下滑，但婴幼儿营养市场整体保持稳定增长，这主要得益于配方奶的高端化趋势以及婴幼儿辅食和营养补充剂渗透率不断提高。市场机遇在于针对前沿的配方奶成分进行互动型市场教育，推出多种类型的功能型辅食产品（如将新配方和感官刺激相结合），以及搭乘零食趋势推进营养补充剂的创新。”

酸奶 - China

“今年酸奶市场的增速有所放缓，但2021年很可能再度回升并迎来高个位数增长。新冠疫情促进了消费者对酸奶的需求，因为他们寻求更好的免疫力。常温酸奶的增速仍然跑赢冷藏酸奶，因为常温酸奶更容易买到，并且在低线城市和农村地区的渗透率更高。冷藏酸奶很可能会经历小幅增长。在市场方面，冻干技术和渠道协同将带来新机遇。同时，新颖的口味和质地以及具备特定具体功能的酸奶也在刺激该品类的消费者需求。”

— 彭袁君，研究分析师

“Sauces, seasonings, and spreads is expected to enjoy a steady growth after COVID-19 due to growing frequency of in-home cooking. Retail value sales are expected to grow in all segments, with more concentrated market share to leading players. Consumers’ changing dining habits and growing healthy consciousness is driving the channel ...

Cheese - China

“The cheese market will continue its growth trajectory as the fastest growing dairy category, albeit from a smaller base. Brands can expand the formats of cheese to place it in competition with the broadening snack category and target more adult consumers, rather than focusing purely on its nutritional value. Collaborations ...

December 2020

Baby Nutrition - China

“Although continuing to face a declining birth rate, the total baby nutrition market still maintains steady growth, mostly driven by premiumisation in IMF as well as increasing penetration of baby supplementary foods and baby health supplements. Opportunities lie in interactive marketing education for cutting-edge IMF formulae, category expansion to offer ...

Cooking and Baking Habits - China

“The COVID-19 outbreak has resulted in the shift from dining out to cooking and baking at home. Most young consumers aged 18-24, who used to bear less cooking responsibility, have stepped into the kitchen and kept

Yogurt - China

“The growth rate of the yogurt market slowed down this year but will likely pick up at a high single-digit level again in 2021. The outbreak has driven consumer demand for yogurt as consumers seek better immunity. Ambient yogurt will still grow faster than chilled yogurt because of easier accessibility ...

their cooking habits in the post-COVID-19 period. Ready-to-cook products and compound seasoning packs could ...

November 2020

宠物食品 - China

“宠物主人在选择宠物食品方面变得更为成熟且更有经验，因为他们在做出购买决定前会主动搜寻信息。他们对食品安全的担忧和对营养的关注表明，品牌不仅应强化营养，还应提供透明的产品信息。随着人们对待宠物的态度不断转变，将其视为家人和朋友，对功能的关注将有助于提升宠物的全方位健康。此外，人们对人宠关系的重视也表明，提升食用体验是宠物食品值得关注的创新途径。”

— 鲁睿勋，研究分析师

早餐 - China

“疫情期间，更多消费者在家吃早餐，这给零售产品带来契机。各商家正搭乘数字化趋势，构建便利的早餐服务设施，以努力满足每位消费者的早餐需求。尽管早餐被誉为一天中最重要的一餐，但由于消费者早上时间紧张和胃口不佳，早餐经常会被省略。谷物食品方便准备，除此之外，谷物食品品牌还可以添加“更多有益成分”，以加强该品类的健康形象。”

— 吴珍妮，研究分析师

October 2020

Pet Foods - China

“Pet owners are becoming knowledgeable and sophisticated in selecting pet food, as they will proactively seek information before making purchase decisions. Their concern around food safety and attention to nutrition suggest brands should not only fortify nutrition but also provide transparent information. With the evolving attitudes of treating pets as ...

预加工食品 - China

“新冠疫情改变了消费者的用餐习惯，消费者从外出用餐向居家烹饪的转变，为预加工食品创造了市场机遇。随着对便捷定义的不断改变，品牌既要迎合消费者对更大便利性的追求，也要满足他们对营养和风味的更高需求。随着在家做饭的消费者越来越多，定制化产品可帮助品牌更好地满足其多元化的需求。同时，拥抱新零售和外卖渠道也是品牌为消费者提供更大便捷的另一途径。”

— 鲁睿勋，研究分析师

Breakfast Foods - China

“During the outbreak, more consumers have taken breakfast at home, which provides good opportunities for retail products. By leveraging digitalization, players are endeavouring to meet the breakfast needs of every consumer by building up convenient breakfast service facilities. Despite being touted as the most important meal during one's day, breakfast ...

September 2020

冰淇淋 - China

“国内冰淇淋市场极大程度上受益于冷链分销的扩张，这给品牌带来了商机，通过线上渠道，将冰淇淋重新定义为适合居家食用的甜品。添加丰富的口感、纵享型的独特原料、或使用正宗的生产方式都有助于打造更高端的形象，现代化的冰淇淋产品可通过这些方式脱颖而出。”

— 蒋安妮，食品和饮料研究分析师

August 2020

Ready Meals - China

“Consumers’ changing dining habits from eating out to cooking at home due to COVID-19 bring market opportunities for ready meals. With the evolving definition of convenience, brands should satisfy consumers’ desire for elevated convenience without compromising their upgraded requirements for nutrition and flavour. Customised products could help brands better serve ...

包装烘焙食品 (新冠疫情后的增长) - China

“近年来，包装烘焙食品品类稳定增长，未来几年将继续保持增势。层出不穷的风味和口感创新迎合了市场动态，是该品类增长的主要动力。市场竞争环境激烈，驱使品牌致力于彰显产品多样性，并且进军更多消费场合。新冠疫情期间，包装烘焙食品的市场需求增加，因为消费者希望能从此类食品中寻求慰藉，提振心情。长远来看，由于消费者更注重健康饮食和身心健康，他们未来会热衷于更健康的产品选择。”

— 吴珍妮，研究分析师

July 2020

Packaged Bakery Foods (Growing after COVID-19) - China

“The category of packaged bakery foods has kept steady growth in recent years and will continue on an upward trajectory in the coming years. Continuous flavour innovation and texture experimentation are shaping market dynamics, which are the major driving force of category growth. The market landscape is competitive, and brands ...

Ice Cream - China

“The domestic ice cream market has benefited greatly from the expansion in cold-chain distribution, providing opportunities in redefining ice cream as a dessert suitable for in-home consumption through online channels. Modernized ice cream products may differentiate through inclusion of additional textures, distinctive and indulgent ingredients or use of authentic manufacturing ...

植物基饮食 (含新冠疫情分析) - China

“植物基食品和饮料包装上的醒目标签能给消费者留下来清洁、新鲜的印象，植物基食品和饮料可从中受益。疫情之后，消费者迫切地想要增进身心健康，同时对美味诱人的创新兴趣浓厚，这给植物蛋白饮料中的优质成分和肉食替代品的登场带来了机会。尽管新冠疫情带来了经济上的不稳定性，但创新植物肉的主要受众群体是相对富裕的人群。对于心怀抱负，想要开辟新的疆域的企业来说，这意味着机会。”

— 徐文馨，高级分析师，2020年5月31日

牛奶和乳饮料 (含新冠疫情分析) - China

“近几年，牛奶和乳饮料市场的增速有所放缓，但将保持缓慢且稳定的增速。除了当前正在进行的供应链改革（如上游供应商的整合或建立以数据为中心的物流系统），产品还需进行其他升级，以证明其溢价的合理性。品牌将进一步开发冷藏细分品类，以满足消费者对营养和新鲜度日益增长的需求。在纯牛奶中，更多的功能性宣称将与营养宣称融合，而增加风味牛奶的饮用场合或许是扭转下滑趋势的有效之策。市场将从新冠疫情造成的短期物流中断中恢复到先前的水平。长期市场前景并未动摇，因为许多消费者认为牛奶有助于增强免疫力，这是新冠疫情之后消费者越来越重视的健康益处。”

——蒋安妮，研究分析师，食品和饮料，2020年4月30日

Plant-based Diets (Incl Impact of COVID-19) - China

“Plant-based food and drink products benefit from consumers’ positive perceptions of their cleanness and freshness through bold on-packaging claims. The urge to improve health and wellness after the COVID-19 outbreak, along with the curiosity for mouth-watering innovations, present opportunities for prime ingredients in plant-protein drinks and the introduction of innovative ...

June 2020

Milk and Dairy Beverages (Incl Impact of COVID-19) - China

“The growth rate of the milk and dairy beverages market has slowed in recent years but will likely continue at a low and steady rate. In addition to the supply chain reforms currently underway, such as integration of upstream suppliers or establishing data-centric logistics systems, products will include additional upgrades ...

April 2020

方便食品 - China

“由于线上渠道的扩张，方便食品触及到更多消费者，消费者不再满足于一个便利的替餐，并且已开始寻求营养和质量方面的因素。消费者将期盼方便食品越来越像新鲜现做食品。未来的产品创新将需要更主动为消费者在健康益

肉类零食 (含新冠疫情分析) - China

“新冠疫情爆发后，消费者对健康饮食的意愿愈发强烈，对提高免疫力的需求也在不断提升。因而在做肉类零食购买决策时，营养会成为特别关注的因素。对于品牌而言，与消费者沟通升级的制作工艺和原料，是增强肉类零食作为蛋白质补充产品的关键。消费者对“不含”宣称产品的需求也为高端化提供了一条“捷径”——可以进一步促进业务增长。”

— 鲁睿勋，研究分析师，2020年4月30日

Meat Snacks (Incl Impact of COVID-19) - China

“Rising willingness to healthy eating and demand in immunity improvement after the outbreak of COVID-19 will result in special attention to nutrition when making purchase decision for meat snacks. Communication on upgrades in processing technique and ingredients sourcing will be the key for brands to strengthen the role of meat ...

处、风味选择、产品安全性、原料质量和生产技术上提供额外的价值和功能性。”

- 蒋安妮，食品和饮料研究分析师

March 2020

Instant Foods - China

“As instant foods reach more consumers with the expansion of online channels, consumers are no longer satisfied with just a convenient solution and have started looking for factors regarding nutrition and quality. Consumers will expect instant foods to evolve towards becoming more like freshly made meals. Product innovation in the ...

节庆食品 - China

“象征意义维持了传统节庆食品在礼品市场中的主导地位。传统节庆食品品牌为增强在市场中的地位，正积极利用国潮复兴之势，并在产品口味、成分和包装创新上不断进行尝试。跨品类合作助力品牌在同质化的市场中提升品牌知名度。此外，除了定位传统节日，品牌还可进一步涉足西方节日。”

- 吴珍妮，研究分析师

February 2020

Festive Foods - China

“Symbolic meaning helps maintain traditional festive foods’ mainstream position in gifting. To strengthen their presence, traditional festive food brands are actively capitalizing on the revival of Chinese heritage and also are taking tentative steps in terms of their flavour, ingredients and packaging innovation. Cross-category cooperation helps increase brands visibility in ...

零食消费趋势 - China

“随着消费目的的多样化，品牌应抓住机会，更好地满足消费者特定且细分化的需求。有孩子的消费者对零食的营养价值要求更高，品牌可以通过在为儿童设计的零食中添加营养成分来满足他们的需求。零食社交的兴起也表明品牌可利用社交属性来升级产品。”

- 鲁睿勋，研究分析师

January 2020

Consumer Snacking Trends - China

“As the purposes for snacking diversify, brands should seize the opportunity to better serve consumers’ special and fragmented demand. Higher requirements towards nutrition from snacks among consumers with kids demonstrate opportunities to use nutritious ingredients in snacks designed for children. The rise of social snacking also suggests snack brands can ...