

January 2017

咖啡店 - China

“尽管来自非专营咖啡场所的竞争日趋激烈，咖啡店市场预计将保持稳健增长。品牌开始放眼更多场合并且走向高端化，这一过程中必须要认识到体验是至关重要的努力方向。”

– 陈杨之，研究分析师

啤酒 - China

“中国经济放缓抑制了消费支出；中国啤酒销售日趋放缓，主要由高端化（增量转为增质导致销量下滑）和恶劣天气（如冷夏和水灾影响啤酒产量）所致。若要实现增长，中国啤酒市场需实现多元化，这要求啤酒厂商开发多种类产品，以迎合不同的细分市场和消费者需求。”

December 2016

Coffee Houses - China

“The out-of-home coffee market is expected to continue robust growth although coffee houses may face increasing competition from non-specialist coffee places. As brands target more locations and go premium, they must bear in mind that experience is what matters the most.”

– Summer Chen, Research Analyst

Beer - China

“Chinese consumer spending has been hit by the economic slowdown; beer sales in China are also slowing, essentially caused by premiumisation (quality over quantity which has resulted in reduced volume sales) and unfavourable weather (eg a rainy summer and severe flooding influenced levels of beer production). In order to grow ...

葡萄酒 - China

“虽然本土葡萄酒企业仍然是市场领导者，但随着线上购物的流行以及国际产品更容易买到，中国消费者越来越了解外国品牌和进口葡萄酒。目前在中国，葡萄酒已成为全国上下各线城市不同消费群体的大众饮品，而不再像以前那样被认为是专属精英人士的尊享用品。特殊活动或休闲聚会场合等消费场合是促使消费者购买葡萄酒的主要因素，因此葡萄酒公司和品牌应着重开发这些场合。”

November 2016

Wine - China

“Although domestic wine players are still the market leaders, along with easier access to online shopping and international products, consumers in China have become more aware of foreign brands and imported wines. Wine in China is no longer seen as an indulgence of the elite as it previously was, but ...

果汁 - China

“在不断萎缩的果汁市场上，包装果汁步履维艰，既要面对来自餐饮渠道鲜榨果汁的竞争，也难逃果汁饮料（包装果汁中的主导品类）市场下滑的厄运，这就使得重点企业试图通过转变非用户来推动销售的空间变得非常有限，但也为健康类包装纯果汁和功能果汁提供了发展机会。中国果汁厂商面临的挑战是如何继续保持积极的关联性和为品类增添附加价值，以赢得消费者的信任，从而增加消费和提高趋优购买的信心。不加糖和全天然的产品可以提高果汁的健康形象和打消消费者的安全顾虑。”

– 李蕾，研究分析师

October 2016

Juice - China

“In the shrinking juice market, packaged juice is not only facing competition from on-trade fresh juice but is also pressured by the decrease of juice drinks – the dominant segment in the category, which leaves limited scope for key players to convert non-users to drive sales, but poses an opportunity ...

September 2016

西方烈酒 - China

“中国西方烈酒市场正面临前所未有的压力，政府推行的反奢侈浪费运动对奢侈品的冲击在中国西方烈酒市场上表现得淋漓尽致。但市场回温迹象已开始显现，根据目前的推测和趋势（如非商业消费的高端化趋势以及乐观的消费者指标）可预计未来市场将重回增长轨道。虽然西方烈酒市场主要由领先企业所掌控，但这些企业仍需通过营销、拓展饮用场合和购买渠道来攫取销售份额和提高积极心态，从而赢得消费者的信任和信心。中国西方烈酒的前景广阔，中国消费者日益讲究挑剔意味着市场仍有创新和探索的空间。”

– 李蕾，研究分析师

Western Spirits - China

“China’s Western spirits market is under pressure and reflects how the anti-extravagance campaign has affected the luxury sector. Market recovery has been seen and future growth can be projected based on current forecasts and trends, such as premiumisation in the non-business sector and positive consumer indicators. While the bulk of ...

August 2016

餐饮娱乐渠道饮酒趋势 - China

“目前酒精饮料市场正处于转型阶段。在2021年之前的未来五年中，增长率将保持低位但趋于稳定。随着体验消费文化的日益流行，以及西方生活方式和购物价值的影响力日趋增强，中国消费者渴望在产品 and 餐饮娱乐体验中寻求创新。”

– 马子淳，高级研究分析师

咖啡 - China

“虽然耳挂式咖啡在中国市场上的渗透率仍然很低，但该类品类兼具速溶咖啡的便利和现泡咖啡的原汁原味，其价位也是介于二者之间。另外，其形式与中国传统袋泡茶接近，因此消费者可以很容易就习惯于耳挂式咖啡的使用，并认为这种咖啡更天然、加工程序也更少。因此，英敏特预测耳挂式咖啡可能是下一个热卖咖啡品类。”

Coffee - China

“Though the penetration of drip-bag coffee is still low in China, drip-bag coffee has the convenience of instant coffee and the original taste of freshly brewed, and the medium price range between the two. In addition, as its format is similar to traditional Chinese tea bags, consumers could easily adapt ...

运动和能量饮料 - China

“得益于中国消费者对健康的日益重视和生活节奏的加快，中国运动和能量饮料市场经历了爆炸式增长，而且这种快速增长势头预计将继续保持。当前，中国运动和能量饮料市场主要由国际领先企业所主导，这一市场格局使国内品牌和小品牌面临着威胁与机会并存的局面。”

July 2016

On-trade Alcoholic Drinks - China

“Now is a transformative phrase for the alcoholic drinks market. Growth rate will be low but stable over the next five years to 2021. With the rise of an experiential consumption culture and stronger influence from Western lifestyle and purchasing value, Chinese consumers are eager to seek out innovations in ...

中国白酒 - China

“中国白酒市场发展缓慢，但目前迎来触底反弹，回温迹象显现。在反奢侈浪费运动的压力下，降价策略并不能为高端白酒企业带来可持续发展；公司和品牌应侧重于白酒的独特性，来由此区别于其它烈酒品类。为了瞄准下一代白酒饮用者，公司和品牌不仅应大力研发包装创新，而且还要着眼于购买渠道和购买场合的多元化发展，以影响年轻消费者的购买决定。定制化和个性化白酒也应是公司和品牌的重点布局。”

— 李蕾，研究分析师

June 2016

Chinese Spirits - China

“The Chinese spirits market developed slowly but is now resilient and shows signs of recovery. Price reduction is not a sustainable tactic for premium baijiu market players to deal with the pressure of anti-extravagance; companies and brands should concentrate on the uniqueness of baijiu to differentiate it from other spirits ...

牛奶和调味奶 - China

“鉴于中国有大量的乳糖不耐症患者，无乳糖牛奶大有可为。不过，由于消费者对乳糖不耐症认知不足，所以长远的消费者教育势在必行。植物蛋白饮料也威胁着牛奶市场的发展，意味着牛奶生产商应强化其健康益处，积极备战日益加剧的竞争。低脂牛奶仍将是市场小众产品，不过制造商可以借鉴参考全球的‘优质脂肪’奶趋势进行创新”。

— 刘超伦，高级研究分析师

May 2016

Sports and Energy Drinks - China

“Thanks to increasingly health-conscious consumers and their fast-paced lifestyles, China’s sports and energy drink market has experienced explosive growth and will continue to expand quickly. The Chinese sports and energy drinks market is dominated by leading international players, posing both threats and opportunities for smaller and domestic brands. With consumers ...

餐饮娱乐渠道软饮料饮用趋势 - China

“饮料通常不是一餐当中的主角，但搭配食物一起售卖可以有效提升消费者点购饮料的可能性。配餐概念在酒类和西餐文化中已得到充分的开发，但在中国文化中除了凉茶已成功与火锅搭配外，将其它非酒精饮料与各式中国地方特色菜一起搭配饮用的空间也非常广阔。”

— 杨晴，研究分析师

婴幼儿配方奶 - China

“面对即将颁布的更严格的行业规范和日益加剧的市场竞争，找到与消费者沟通和进行产品销售的新方法是公司和品牌的当务之急。易于消化吸收和类似母乳的婴幼儿配方奶产品更有可能在中国市场上取胜。另外，鉴于中国妈妈们掌握的婴幼儿配方奶成分的知识有限，公司和品牌需要在市场教育方面加大投资。”

— 李宇静，高级研究分析师

On-trade Soft Drinks - China

“Beverages usually are not the centre of a meal, but pairing the beverages with food can effectively increase consumers’ likeliness of ordering a drink. Aside from herbal tea brands which have successfully paired themselves with hot pot cuisine, there is still great potential for other non-alcoholic drinks to pair with ...

Milk and Flavoured Milk - China

“Given the large base of lactose intolerants in China, the lactose-free milk segment is worth investing in. The market will, however, require laborious education programmes due to poor consumer understanding of lactose intolerance. Plant protein drinks are also threatening the milk category, suggesting that milk producers should reinforce their health ...

Infant Milk Formula - China

“Faced with upcoming tougher regulations and increasingly intense market competition, companies and brands need to find new approaches to communicate with consumers as well as drive sales. IMF (Infant Milk Formula) products which are easier to absorb and similar to breast milk are more likely to win in the China ...

April 2016

Tea Drinks - China

“The ready-to-drink tea drinks market in China has developed slowly over recent years. Intense competition from other soft drink categories and the decline in demand for green and black/red tea drinks, and lack of product innovation have all led to the poor performance of the current market. Despite the ...

March 2016

瓶装水 - China

“瓶装水市场目前处于发展相对平稳阶段，主要得益于以下几方面：以销量取胜的低端市场快速扩张，高端市场尽管较小，但增长迅猛、利润空间巨大。低端品牌大打价格

儿童饮品 - China

“目前很多儿童饮料过分强调儿童偏好的口味和包装设计，并忽略了家长才是最终购买决策者的事实，而全天然成分对于家长来说是最重要的购买因素。过多的食物添加剂和高含糖量是目前家长们最担忧的问题，儿童饮料中应减少使用这些成分，以保持该品类的市场可持续性，并与来自非儿童饮料市场上的竞争相抗衡。”

茶饮料 - China

“近几年，中国即饮茶饮料市场增速放缓。目前，市场表现不济的原因在于：与其他软饮料品类之间的竞争白热化；消费者对绿茶以及红茶饮料的需求下滑；市场中缺乏产品创新。由于商家不断推进高端化，鼓励消费者趋优购买，同时，积极展开口味和成分创新，并推行行之有效的消费群体细分战略，精准定位。鉴于此，尽管市场面临多方压力，但未来的发展前景依旧乐观。”

— 李蕾，研究分析师

Children's Drinks - China

“Many current CD products have overemphasized the kids-friendly taste and package design and have overlooked that parents are the ultimate decision makers, with all-natural ingredients the element that matters most for them. Excessive food additives and high sugar content are currently parents’ biggest concern and should be removed to keep ...

Bottled Water - China

“The current bottled water market is at a more sustainable stage driven by rapid expansion in the low end, with a volume sales advantage and a small high-end

战，而高端品牌在优质水源和包装等高端属性方面展开激烈竞争。尽管消费者仍然主要愿意去超市等线下渠道购买瓶装水，但还没有进入电商领域的公司和品牌将会错过很多商业机会。随着收入的不断提高和污染的持续恶化，消费者更有可能进行趋优购买。重点企业需要根据消费者的需求和角度来进行高端瓶装水营销，而不是着眼于公司和品牌的前景。”

– 李蕾，研究分析师

January 2016

植物蛋白饮料 - China

“中国市场上的植物蛋白饮料通常被定位为具有滋养功效的传统饮品。但鉴于使用场合已延伸到早餐之外，厂商应在产品中增添新的元素，以使植物蛋白饮料的饮用场合更加休闲与多元。”

– 杨晴，研究分析师

market with escalating growth and high profit margins. While low-end brands are competing on price, high-end brands are rivalling with premium associations ...

Plant Protein Drinks - China

“Compared with beverages in other categories, plant protein drinks in China are usually positioned as traditional and nourishing. However, as usage occasions have expanded beyond breakfast, manufacturers should add new elements into the products to make PPDs more suitable for broader, casual usage occasions.”

– Ching Yang, Research Analyst