

### February 2015

#### 啤酒 - China

“中国在2010年超越美国成为世界第一啤酒生产大国，其规模几乎是位居第二的美国啤酒市场的两倍。显而易见，啤酒市场已经开始饱和，内生增长的空间日益有限。因此，该市场的增长更有可能通过产品质量升级和消费者趋优消费，而非扩张渗透实现。高端化将是决定啤酒品牌在中国市场成功与否的关键。”

– 张一，高级研究分析师

### January 2015

#### 果汁 - China

“为适应更忙碌的生活方式和满足当前消费者的均衡营养摄取所需，定位蔬菜汁为就餐时的饮料将为品牌带来巨大的市场潜力。果蔬汁产品缺乏差异化是中国大多数生产商们面临的巨大挑战，果蔬汁品牌需要学会如何创立独特的品牌个性以求脱颖而出。”

– 邱昊、研究分析师

#### 葡萄酒 - China

“一改过去高端葡萄酒市场零售额持续迅猛增长的态势，如今量价齐跌的巨变令市场措手不及，难以应对。然而，葡萄酒进口量和国内产量的骤降显示该市场泡沫终于开始破裂。对于葡萄酒市场而言，这并非一场灾难：回归大众消费市场是该市场发展的核心推动力。”

– 张一，高级研究分析师

### December 2014

#### Beer - China

“China surpassed the United States in 2010 to become the biggest beer market in the world and is now nearly double the market size in retail volume terms of the US market; the current second largest market for beer. It is now clear that the beer market has started to ...

### November 2014

#### Juice - China

“There is great market potential for vegetable juice to be positioned as a drink for mealtimes to fit busier lifestyles and a balanced nutrition intake needs of today's consumers. Lack of differentiation on juice products has been a big challenge for most market players in China, and juice brands need ...

#### 烈酒 - China

#### Wine - China

“The abrupt shift in the wine market - with volume and average prices going down - seemed unimaginable when premium wines were seeing their retail values sky rocket. However, the sharp decline in importing and domestic production shows that the bubble is finally bursting. However, this is far from a disaster for ...

“烈酒市场在2010年享有的40%高速增长似乎一去不复返了。黄金十年就此嘎然而止，使人始料不及。高端市场的萎缩以及随之引发的中端市场膨胀使得烈酒品牌在2012/13年度艰难踱步，市场销售额增速滑落至13%。英敏特对该市场2014年的增长预期为6.4%，只稍稍高于通胀率，使其成为自2000黄金十年以来的最差市场表现。”

白酒不仅面临监管压力，同时也遭遇主要竞争对手——外国烈酒的冲击。虽然白酒保持了98%的市场占有率，但其核心用户，即一线城市的30多岁和40多岁消费者呈现下滑态势。为了在竞争中立于不败之地，白酒品牌需要解决消费者对饮酒的健康顾虑，并推出口感更柔和的产品。此外，白酒也可以利用原浆液等概念扩大在二线城市的市场占有率。

外国烈酒面临截然不同的挑战。对其认识不足导致培养消费者饮用外国烈酒习惯的进程缓慢昂贵。在初期热潮退却之后，外国烈酒可以帮助整个烈酒市场在将来实现更可持续的增长。”

— 张一（研究分析师）

## September 2014

### Spirits - China

“The forty percentage point increase in the spirits market in 2010 seems to be a distant memory now. The golden ten years of the spirits market ended in such an abrupt way that few could ever have rightly predicted it happening. The shrinking high-end segment and the subsequently over-crowded mid-range ...

### 婴幼儿食品和饮料 - China

“婴幼儿食品转趋家中自制与中国多个经济和社会顾虑有着不可分割的联系：包括经济生产力放缓、婴幼儿配方奶监管加严和食品安全担忧。但是，越来越多的包装婴幼儿新产品应该会受益于计划生育政策的放宽。为了提供合适的产品，以鼓励妈妈们尝试新品种或保持忠诚度，婴幼儿食品公司需要评估复杂多样的消费模式，包括购买障碍、对特定营养益处的兴趣和包装设计。”

— 刘欣琪（研究分析师）

## August 2014

### Coffee - China

“Brands can market the western coffee culture to Chinese consumers, but still need to localise their

### 咖啡 - China

“品牌可向中国消费者推销西方的咖啡文化，但也需要根据中国人的口味进行产品的本地化。对于居主导地位的速溶咖啡市场，通过产品创新、广告宣传拓展咖啡使用场合，并通过鼓励咖啡的习惯性消费使大多数中频使用者升级成高频使用者，这将是市场发展的机会。”

— 邱昊，研究分析师

### 运动和能量饮料 - China

“品牌应该突破陈规，仅通过宣称运动饮料和能量饮料富含丰富维他命、传递健康之水的产品定位是远远不够的，敢于创新才能保持强劲的增长态势。消费者对其部分成分的持怀疑态度表明天然原料制成的饮料、低卡路里饮料及不含人工添加成分的饮料的市场需求潜力巨大。”

— 严以领，高级研究分析师

### 餐饮渠道酒类饮品 - China

“相对男性，女性在酒类饮品上的花费明显较低，而且女性消费者通常被认为是“难以开拓”的群体。社交媒体和网

products to fit Chinese palates. For the dominant instant coffee segment, growth opportunities come from expanding usage occasions and upgrading the majority medium users to heavy users through product innovation and advertisements. Moreover, there ...

络论坛等新媒体营销活动能帮助品牌更有效的接触女性消费者。突出与食物的搭配和与亚洲餐厅合作进行网络营销活动应该能帮助品牌在女性市场中有所建树。

### July 2014

#### Sports and Energy Drinks - China

To sustain the growth, brands need to go beyond using vitamin enriched drinks as the only way to convey a healthy image for sports and energy drinks. Consumers' concern over negative ingredients suggests there is potential demand for more products with natural ingredients, reduced calorie and are free from additives ...

#### Baby Food and Drink - China

"Vegetables, organic ingredients, and minimising packaging size to control nutritional intake could be the springboard for baby food producers to expand penetration among younger parents."

#### 碳酸饮料 - China

“与此同时，消费者的兴趣也不尽相同。加之各种食品安全恐慌事件层出不穷，以及肥胖症等健康问题日益凸显，这些要求各企业在产品成分、口味及包装方面作出创新。英敏特调研显示，具有保健功效的产品成分能够提升碳酸饮料的吸引力，而口味创新有助于满足日益富有冒险精神的消费群体的需求。通过提供便利的小包套装以及食物搭配和饮品混调，以提高不同场合下碳酸饮料的吸引力，这或许有助于提高销售量。”

### June 2014

#### On-trade Alcoholic Drinks - China

"When it comes to alcoholic drinks, women's spending is significantly less compared with men and female consumers are widely considered 'hard to reach'. Highlighting food pairing and partnering with Asia restaurants in online-based campaigns should be able to help brands stand out when targeting women."

#### 牛奶和调味奶 - China

"2013年牛奶市场在众多兼并和收购活动继续其重组进程。与此同时，中央政府为确保牛奶产品质量实施了更加严格的法规和规定，而这同样间接鼓励了市场洗牌。在不久的将来，小企业恐怕会面临日益增加的压力，从而导致市场的进一步整合。"

— 张一，研究分析师

### May 2014

#### Carbonated Soft Drinks - China

"Consumers' personal interests, various food scares as well as rising health issues such as obesity, are fuelling demand for innovations in ingredients, flavours and packaging. Mintel research shows that ingredients that

can provide added health benefits could broaden the appeal of CSDs."

## April 2014

### Milk and Flavoured Milk - China

"The milk market has been in the process of reshuffle with many large-scale merger and acquisition deals were agreed in 2013. The tightening regulations and stricter rules implemented by the government aiming at ensuring the quality of milk products tend to indirectly encourage the reshuffle of this market. In the ...

### 瓶装水 - China

2008-2013年期间，中国瓶装水销售量的年均复合增长率为20.5%。预计今后五年内，瓶装水市场的增长将放缓，但仍将保持双位数增长。由于价格上涨以及消费者对增值产品的需求增高，预计销售额的增速将略高于销售量的增速。瓶装水市场高度分散，主要由区域品牌组成。事实上，只有前三大公司占据两位数的市场份额。

## March 2014

### Bottled Water - China

"Pure sourcing is key to attracting bottled water consumers, which has created intense competition between manufacturers for acquiring water sources and has even led to merger and acquisition activity. Wide availability in both the on-trade and off-trade, as well as the introduction of smaller pack sizes, is encouraging impulse purchases ...

### 茶饮料 - China

2008年至2010年间，即饮茶市场表现强劲，实现两位数的年增长率。这得益于消费者逐渐意识到碳酸饮料可能有害健康，同时成熟企业 and 新创企业的大力投资同样刺激茶饮料市场快速增长。

## February 2014

### Tea Drinks - China

"The RTD tea drink market enjoyed a strong performance over 2008-10, with double-digit annual growth. This was fuelled by consumers' increasing awareness of the negative health implications of drinking CSDs, and heavy investment in tea drinks by the established and new operators."

### 植物蛋白饮料 - China

植物蛋白饮料被认为是更安全、天然、健康的动物乳品替代品，部分原因是患有乳糖不耐受症的中国人较多，另一个原因是2008年的奶粉安全事件。借力于整个饮料市场增长的大趋势，植物蛋白饮料自2008年以来享有高达18.1%左右的年均复合增长率(CAGR)，但是预计随后五年内CAGR将降低到10.4%。

## January 2014

### Plant Protein Drinks - China

"The emphasis on health benefits and natural ingredients, wider distribution points and broadening occasions for usage could encourage consumer engagement and drive the plant protein drinks market forward."