

January 2023

速溶，挂耳，胶囊咖啡 - China

“消费者日益浓厚的兴趣以及令人兴奋的市场新品推动中国咖啡市场的增长。一方面，消费者希望进一步探索咖啡的风味，以满足他们的好奇心；另一方面，他们也在不断寻求有益于其身心健康的产品。与此同时，鉴于该市场已经充斥着以女性为导向的营销，关注尚未饱和的男性市场或许可以开辟新机遇。”

— 张辰钰，高级研究分析师

December 2022

Instant, Drip Bag and Pod Coffee - China

“Increasing consumer interest and exciting new market offerings facilitate the growth of the coffee market in China. On the other hand, consumers expect further exploration of coffee flavours to satisfy their curiosity, while one the other they constantly look for products that are beneficial to their wellbeing, both physically and ...

功能性饮料 - China

“管理消费者对功能性饮料功效的期望是产品创新和宣传的关键。知名中药成分能赢得消费者的喜爱，并且可以通过将功能性饮料纳入健康管理流程，帮助消费者养成长期消费习惯。新品研发重点需要转向整体身心健康，引导消费者建立健康的生活方式。”

— 黄梦菲，研究分析师

November 2022

瓶装水 - China

“受新冠疫情带来的不确定性影响，出行消费场合的减少威胁着瓶装水市场。调味水和气泡水的人气上升。适用于细分场景和细分消费者的产品将成为未来创新的方向。高颜值包装有助提高产品的价值并营造仪式感，特别是针对直接饮用的场合。”

— 彭袁君，研究分析师

Functional Drinks - China

“Managing consumers' expectations regarding the efficacy of functional drinks is the key to product innovation and communication. Well-known TCM ingredients can win consumers' affinity and benefit the establishment of long-term consumption habits by incorporating functional drinks into health management routines. The new product development focus needs to shift to holistic ...

Bottled Water - China

“Less on-the-go consumption occasions, due to the uncertainty of COVID, poses a threat to the bottled water market. Flavoured water and sparkling water have witnessed increased popularity. In the future, products for segmented occasions and consumers will be the innovation direction. Good-looking packaging can help add value as well as ...

October 2022

气泡饮料 - China

“新冠疫情反弹让消费者认识到碳酸饮料在艰难时期的重要性。除了增强与消费者的情感联系，关注他们以居家为中心的生活方式外，碳酸饮料还应主动摒弃含糖的形象，提供更有益健康的产品。另一方面，气泡饮料可以利用质地创新这一差异化手段，提供新颖和定制化的感官体验。”

— 鲁睿勋，高级研究分析师

西方烈酒 - China

“2022年，新冠疫情造成的市场低迷使得西方烈酒的增长减缓。然而，小众烈酒仍有显著发展，这得益于年轻人强劲的购买力。在充满不确定的时期，品牌需要跟随变化的消费者需求，并维持酒客与市场的联系。例如，以在家创意调制鸡尾酒点亮居家饮酒场合，以及强调社会责任，增进让消费者感觉良好的因素。”

September 2022

Sparkling Drinks - China

"A resurgence of COVID-19 has made consumers realise the importance of CSD during troubled times. In addition to strengthening emotional connections with consumers and focusing on their home-centric lifestyles, CSD should also proactively cast aside its sugary image with better-for-you offerings. Meanwhile, texture innovation highlights a differentiation approach in sparkling ...

Western Spirits - China

"In 2022, market downturn caused by COVID has slowed the growth of Western spirits. However, the development of niche spirits is still significant, thanks to strong purchasing power from younger adults. In uncertain times, brands would need to keep up with changing consumer need and keep drinkers engaged with the ...

July 2022

酒精饮料消费习惯 - China

“2021年，即饮渠道恢复服务，餐饮娱乐渠道饮用的酒类市场强劲复苏；居家饮用的酒类市场保持增势，市场中产品多种多样。虽然西方烈酒和预调酒精饮料市场繁荣扩

即饮咖啡 - China

“2022年，新冠疫情的爆发导致即饮咖啡的增长放缓。不过，由于咖啡文化不断演变，再加上其饮用场景逐渐扩大，即饮咖啡的前景可期。随着消费者更倾向于追求健康的生活方式，即饮咖啡的创新需在健康与纵享之间找到平衡点。由于咖啡市场的竞争日益激烈，品牌可重点关注年轻一代，为他们提供更大胆的产品形态以及投资于契合其价值观的营销沟通。”

RTD Coffee - China

"In 2022, the COVID outbreak has slowed the growth of RTD coffee. However, the future outlook is optimistic thanks to the evolving coffee culture and expanding consumption occasions. As consumers are trending towards healthy lifestyles, RTD coffee innovation should balance health and indulgence. In the ever-competitive coffee market, brands could ...

张，但消费者对葡萄酒的热情不容忽视。酒类行业追随越来越健康的饮用习惯，争相提供‘轻盈版’饮料。意识到消费者对产品‘功能添加’的呼声同样重要，这也符合消费者对健康的追求。”

— 张辰钰，高级研究分析师

June 2022

Consumption Habits of Alcoholic Drinks - China

"In 2021, out-of-home alcoholic drinks achieved strong market recovery with resumed on-trade services; the in-home sector maintained its growth trajectory with diversified product availability in the market. While Western spirits and RTDs enjoy prosperous market expansion, consumers' passion for wine should not be neglected. Following ever healthier consumption habits, the ...

植物基饮料 - China

“新品研发对植物基饮料的增长至关重要。由于大豆饮料的优质营养获得国家膳食指南的推荐，因此前景可期。品牌可利用功能性益处为众人所熟知的成分开拓机遇，特别是益生菌。在营销宣传方面，品牌可树立道德形象，代表消费者实现他们对可持续性的愿景。”

— 黄梦菲，研究分析师

May 2022

Plant-based Drinks - China

"New product development is crucial to the growth of plant-based drinks. Soya-based drinks is promising thanks to high-quality content endorsed by the national nutrition guide. Opportunity also lies on claiming ingredients with well-recognised functional benefits especially probiotic. In terms of communication, brands can establish themselves as Moral Brand that acting ...

茶饮料 - China

“随着外出消费场景的恢复，即饮茶饮料在2021年回归增长轨迹，而创新活动的增加也使得茶包继续快速增长。品牌应对消费者不断变化的口味偏好予以更多关注，提供包括具有健康益处的纯茶和小众品种在内的多元化产品组合。同时，现沏茶有机会通过开发能更好地满足年轻消费者饮用温度偏好的冷萃茶选择，以吸引该消费群体。”

——鲁睿勋，高级研究分析师

Tea Drinks - China

"RTD tea drinks returned to its growth trajectory in 2021 with resumed out-of-home consumption occasions, while tea bags still achieved strong growth with increased innovation activities. It's important to pay more attention to consumers' evolving taste preferences with a diversified product portfolio, including pure and niche tea offerings with health ...

牛奶和乳饮料 - China

“整体来看，液体白奶在今年的表现最为出色。虽然如此，常温纯牛奶需谨慎定价，并更关注产品口味，而冷藏纯牛奶可从更多维度传达新鲜度。原味奶粉正乘搭不断增长的银发经济浪潮，功能性宣称将成为该市场的破局关键点。由于益生菌保健品来势汹汹，乳酸菌饮料需思考如何通过不同的方式阐述产品对肠道的益处。”

— 彭袁君，研究分析师

April 2022

Milk and Dairy Beverages - China

"White liquid as a whole had the best performance this year. But ambient plain milk needs to be conscious about pricing and pay more attention to taste, while chilled plain milk can leverage more dimensions to deliver the concept of freshness. White powder is leveraging the growing silver economy and ...

March 2022

跨界饮料 - China

“在非酒精饮料品类持续的减糖变革之中，水果等天然成分提供了代糖之外的另一条路径，能够帮助打造具有不同甜度的风味选择，以满足不同消费者的减糖需求。随着非酒精饮料在补充营养方面的角色不断演变，以及品类之间的界限愈发模糊，品牌同样有机会利用强化的营养和功能，助力消费者将非酒精饮料纳入其健康管理流程之中。”

——鲁睿勋，高级研究分析师

为儿童购买食品饮料的态度 - China

“首份儿童零食标准的发布为儿童食品饮料产品树立了标杆，再加上近来的教育改革旨在促进儿童的整体身心健康，因此，儿童食品饮料市场日益受到资本和企业的重视。如今的家长见多识广且越来越重视健康，面对他们挑剔的目光，品牌的增长机会在于针对儿童日益严重的健康问题推出革新产品，减轻家长对此的担忧，并推出面向不同年龄段儿童的新品，为孩子提供专属关爱。”

— 张辰钰，高级研究分析师

February 2022

Beverage Blurring - China

“Under the ongoing sugar reduction revolution in non-alcoholic drinks, natural ingredients such as fruits provide another approach besides sugar substitutes in delivering flavoured options with different sweetness to cater to different consumers' needs. With the evolving role of non-alcoholic drinks in supplementing nutrition and blurring boundaries between categories, opportunity also ...

Purchasing Food and Drink for Children - China

“The release of the first children snack standard has set the standard bar high for children food and drink products, coupled with recent education reformation towards promoting children's holistic wellbeing, this market is being increasingly valued by capitals and enterprises. Facing scrutiny by ever knowledgeable and health driven parents, opportunities ...