

An aerial photograph of the Shanghai skyline at sunset. The sun is low on the horizon, casting a warm orange glow over the city. The Huangpu River flows through the center, with the Oriental Pearl Tower and other skyscrapers visible in the background. The foreground shows a dense urban landscape with various buildings and structures.

KANTAR

Inspiration for an extraordinary world!

新零售时代下的品牌增长逻辑

Growth Path in New Retail Era

虞坚/林峰

Jason Yu/Steve Lin

议程AGENDA



1

中国食品饮料市场趋势

China F&B Market Performance



2

重点人群机会 – 拥抱Z世代

Key Consumer Segments – Embrace Gen Z Opportunities



3

重构品牌增长逻辑

Rebuild Brand Growth Path

下一个风口在哪里？

小蓝杯 社区拼团 椰子灰
百香果 拼多多 城市罐
MINI喜茶 IP营销 大白兔 牛油果
樱花 低糖主义 盒马 跨界 快闪店 国潮
口味定制 联名 朋克养生 故宫
佛系 蓝色 猫爪杯 一人食 单身狗粮
可乐 旺旺沙发 老字号 香椿自由 辣花生巧克力
限定款 网红咖啡 小猪佩奇
营养快线眼影

2018年食品饮料市场表现如何？

How did the 2018 F&B market perform?

中国快速消费品市场较去年增长5.2%，消费升级和城镇化继续增长的两大驱动引擎

FMCG in China increases by 5.2%, driven by premiumisation and urbanization

中国快消品销售额增长率%，2018 vs. 2017
Total FMCG value growth 2018 vs. 2017

+5.2%

食品Food : +4.7%
饮料Beverage : +1.5%

购买频率
Purchase Frequency



+1.5% ▲

均价
Average Price



+4.6% ▲

城镇家户数
of urban household

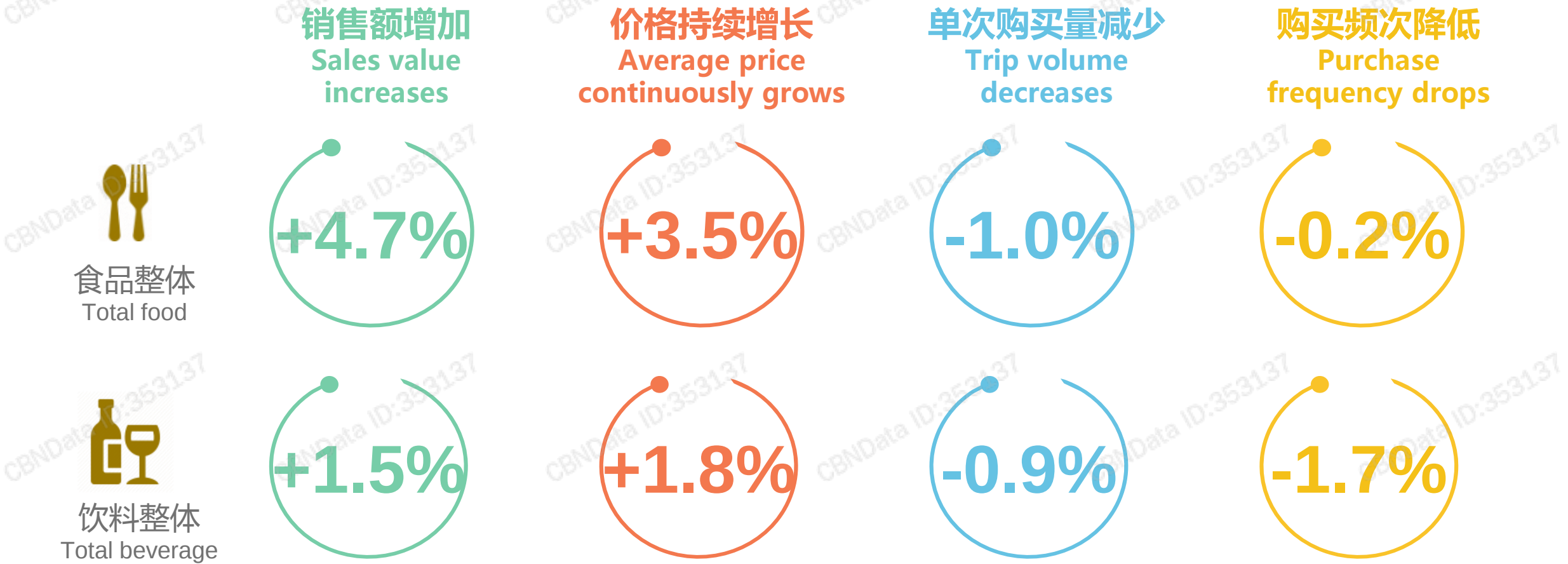


+2.3% ▲

数据来源：凯度消费者指数，家庭购买样组，2018 vs 2017
Data Source: Kantar Worldpanel, Household Panel, 2018 vs 2017

价格增长驱动食品饮料品类销额增加, 而销量的增长疲软

Higher price drives value growth of F&B, while volume remains stagnant



数据来源：凯度消费者指数，家庭购买样组，2018 vs 2017
Data Source: Kantar Worldpanel, Household Panel, 2018 vs 2017

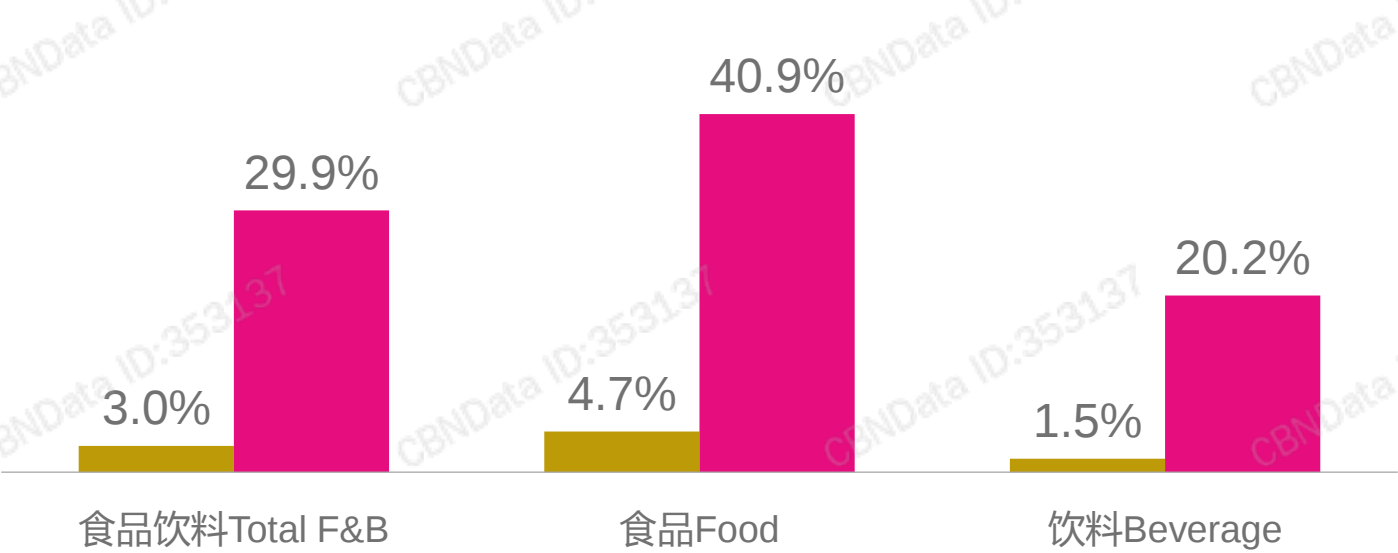
网购带动食品饮料市场成长，增长金额贡献达到73%

E-commerce drives the growth, with 73% contribution

2018年食品饮料增速
2018 F&B value growth

网购对食品饮料增长金额的贡献
Spend contribution of online shopping to
F&B growth

■ 全渠道 Total channel ■ 网购 Online shopping



2017 48%

2018 73%

数据来源：凯度消费者指数，家庭购买样组，2018 vs 2017
Data Source: Kantar Worldpanel, Household Panel, 2018 vs 2017

品类红利及可支配收入的提高，下线城市对市场贡献逐渐增加

With more category growing their penetration and disposable income increase, low tier cities contribute more to overall growth

下线城市对食品饮料的金额贡献

Spend contribution of lower tier cities to F&B growth

2017

2018

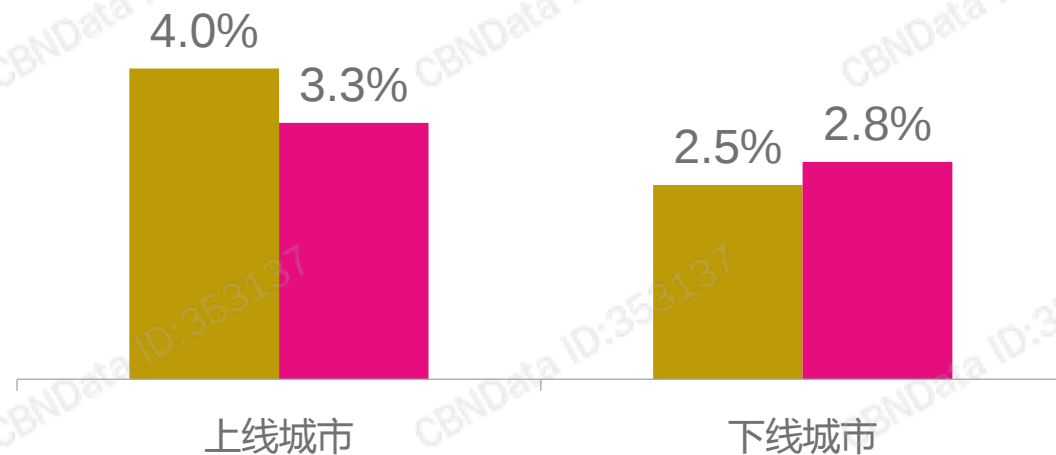
50%

57%

食品饮料市场金额增长

F&B value growth

■ 2017 ■ 2018



预览已结束，完整报告链接和二维码如下：

https://www.yunbaogao.cn/report/index/report?reportId=1_17124

