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## 尼尔森IQ 2024零售消费指数

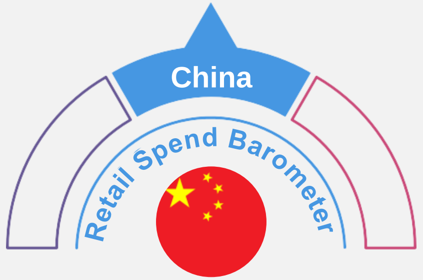
- 中国快速消费品（FMCG）和科技及耐用消费品（T&D）在2024年第二季度的消费额与去年同期相比略有增长，其中FMCG增长**0.6%**，T&D增长**1.13%**。
- 中国快消品销量增长有所放缓，酒水饮料增长**6.7%**，家居护理增长**5.8%**，健康概念产品受到消费者青睐。
- 智能手机市场增长迅速，**2024**年上半年销售总额超过**5100**亿元人民币，同比增长超过**14%**，而家电市场则需求放缓，同比下跌**8.14%**

**2024**年第二季度，中国消费者在快速消费品和科技及耐用消费品的消费额与去年同期相比增长**0.9%**，其中快速消费品同比增长**0.6%**，科技及耐用消费品同比增长**1.13%**。该数据来源于**NIQ**零售研究监测数据及**GfK**零售监测数据，首次在中国发布。该工具衡量全球各地零售店销售的快速消费品和非食品消费品的销售额。
**NIQ**零售消费指数基于全球超过**350,000**家零售合作伙伴的销售数据，提供全球6大市场15个国家的零售消费指数，每季度发布一次，以说明消费者支出的优先事项。在中国，监测品类为快速消费品行业（常温和冷冻食品、酒水饮料、零食、乳制品、宠物护理、家居护理、个人护理、婴儿护理和纸制品）和科技及耐用消费品行业（技术消费品、家用电器、**DIY**及家居改善）的全渠道消费概览。

### 中国消费者消费额 (2024年第二季度)

¥ 1,030,664,372,621

+0.9%




+0.6%
快消品

+1.1%
科技及耐用消费品

### 中国快消品市场增长放缓，新消费模式和健康产品成亮点

NIQ 零售消费指数显示，快消品增长放缓，包括内容电商在内的中国快消品全渠道销售额在2024年第二季度同比增长0.6%，低于第一季度的3.1%。其中，综合电商渠道下降0.7%，内容电商渠道增长14.3%。购物节效应日趋常态化，消费者线上购买的目的更加丰富，内容电商具备更强的种草至购买的转化能力。线下渠道下降1.1%，得益于近场零售的增长，下降幅度有所减缓。与此同时，线下渠道格局持续分化，如零食店、会员店、折扣店等新兴的零售模式，正以其多样化和独特的产品组合以及有吸引力的价格点，成为推动线下渠道增长的新抓手。

从品类看，酒水饮料继续保持领涨地位，在第二季度增长6.7%，无糖茶、椰子水以及中式养生饮料成为市场亮点。此外，家居护理在第二季度增长5.8%，尤其是驱虫剂的需求激增，推动了该类别的增长。无论食品还是用品，健康概念持续获得消费者青睐。

此外，消费者也越来越热衷于享受即时零售（O2O）带来的便利性，购买范围从生鲜产品逐渐扩展至所有品类，O2O在现代零售渠道中的销售额占比已经接近8%，在一些酒水饮料和个人护理品类中，这一比例甚至超过了15%。同时，得益于技术赋能，O2O已向独立店铺发展，占整体O2O渠道近20%

“*面对不断变化的零售格局和越发理性的消费者，品牌和零售商正面临着进一步优化价格机制的挑战，同时通过全渠道策略实现协同效应和长期增长。同时，随着消费者购物习惯的不断演变，市场参与者需要不断创新，以适应这些变化并抓住新的增长机遇。*”

**尼尔森IQ客户成功零售负责人，王伶**

NIQ与GFK零售数据研究 2024 Q2 vs 2023 02

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**手机市场高速回暖，白电市场需求不及预期**

GfK零售监测数据显示，科技及耐用消费品中国市场销售额在**2024年第二季度同比小幅提升1. 13%，相比一季度5.66%的增**长有所放缓。

传统科技品类增长稳定，暨一季度**8.32%增**长后，二季度同比增长**4.93%。其中，智能手机以其市**场最高的销售金额占据着举足轻重的地位。随着国家经济的稳健增长和持续进步，加之市场上新产品、新技术的持续推出，智能手机市场正从高端领域开始，逐步引领并激发整体消费需求。**2024年上半年，智能手机市**场的销售总额突破了**5100**亿元人民币，相较去年同期实现了超过**14%的增长。**

**与此同**时，**DIY和家居改善相关**产品销售额下滑明显，同比跌幅达**15.97%，家用**电器的销售额同比下跌**8.14%。**

**白**电市场在今年的**618促**销期间遭遇了一些挑战，冰箱洗衣机干衣机（简称冰洗干）五六月合计零售量下跌**4%，零售**额下跌超过**13%。作**为白电上半年最重要的促销，年中大促的乏力导致冰洗干上半年零售额同比下跌近**3%，各品**类均价均有下滑。然而，随着**8月国家出台以旧**换新政策，预计高能效家电会在下半年受益，带动家电行业缓慢复苏。

**在消**费者层面，尽管当前消费者信心尚未完全恢复，消费热情有所保守，但高端家电市场却呈现出积极的增长趋势，这主要得益于市场上“质价比”产品的吸引力。根据**GfK零售市**场监测数据，上半年冰洗干万元以上市场的零售额同比增长了**1.6%**，显示出入门级高端市场的稳步增长。此外，平嵌式冰箱、大容量滚筒洗衣机、洗烘一体机等高端家电产品正在推动市场的积极扩张，预示着消费者对于高品质家电的需求正在逐步上升。

> “*智能手机市场的复苏得益于多方面因素的共同作用。首先，入门级手机的性能显著提升，使用体验的改善使得消费者更倾向于延长现有设备的使用周期。其次，供应链和制造商近两年将重点转移到中高端产品上，不断推出技术创新和迭代，从而推动了市场的高端化趋势。此外，自2023年下半年以来，上游元器件的成本上涨也促使智能手机的售价整体上升。三大因素共同带动智能手机市场单价持续升级，带动行业进入正向循环。*”
>
> **GfK中国客户成功负责人 Benedict Hong**

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## NIQ Retail Spend Barometer: 0.9% Growth in Q2 2024 for China's FMCG and T&D Consumer Spending

- FMCG and Tech & Durables (T&D) saw a slight increase in China consumption in Q2 2024 compared to the same period last year, with FMCG growing by 0.6% and T&D by 1.13%.
- The growth of China's FMCG industry has slowed, with beverages increasing by 6.7%, household care by 5.8%, and health concept products gaining consumer favor.
- The smartphone market is growing rapidly, with sales exceeding 510 billion yuan in the first half of 2024, a year-on-year increase of over 14%, while the home appliance market underwhelms, with a year-on-year decrease of 8.14%.

In Q2 2024, China shoppers' spending on fast-moving consumer goods (FMCG) and tech and durable (T&D) goods increased by 0.9% compared to the same period last year, with FMCG growing by 0.6% and T&D growing by 1.13% year-on-year. This is according to new insight from the NIQ Retail Spend Barometer, which has been powered by GfK intelligence, and is released in China for the first time. The tool measures the turnover in sales of FMCG and non-food consumer products sold in retail stores across China.

The NIQ Retail Spend Barometer provides a complete overview of China spend for the FMCG sector (ambient and frozen food, beverage, snacking, dairy, pet care, homecare, personal care, baby care and paper products) and for the T&D sector (technical consumer goods, home appliances, DIY and home improvement). This cross-category and cross-channel overview is based on real sales data and is published on a quarterly basis to illustrate household spending priorities.

### China's FMCG market growth slows down, with new consumption patterns and health products shining

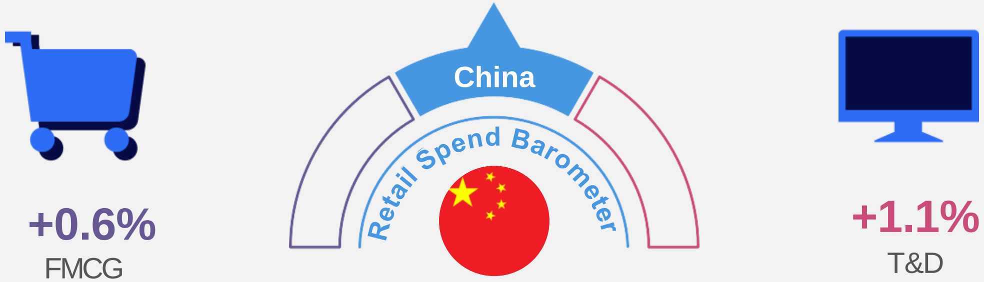
NIQ data shows that FMCG growth has slowed down. The omnichannel sales of FMCG in China, including content e-commerce, increased by 0.6% year-on-year in Q2 2024, lower than the 3.1% growth in the first quarter. Among them, the comprehensive e-commerce channel decreased by 0.7%, and the content e-commerce channel increased by 14.3%. Shopping festivals are becoming increasingly integrated into consumer behavior, and online purchases are serving a wider range of needs. Content e-commerce has a stronger ability to convert from recommending to purchasing. The offline channel decreased by 1.1%, and the decline has been reduced due to the growth of near-field retail. At the same time, the offline channel landscape is evolving, emerging retail models like snack stores, membership stores, and discount stores are playing a crucial role in driving growth through their unique product offerings and competitive pricing.

From the category perspective, beverages remain a driving force in the FMCG industry, growing by 6.7% in Q2. Sugar-free tea, coconut water, and Chinese health drinks emerged as standout categories. Homecare products also saw a surge, particularly insect repellents, contributing to a 5.8% growth in the second quarter. Overall, health-focused products continue to resonate strongly with consumers across food and non-food categories.

The convenience of online-to-offline (O2O) shopping has fuelled a significant increase in consumer adoption, with purchase categories expanding beyond fresh produce to include a wide range of products. O2O now accounts for nearly 8% of sales in modern trade channels, with some categories like beverages and personal care exceeding 15%. Moreover, with the empowerment of technology, O2O has expanded to independent stores, accounting for nearly 20% of the total O2O channel.

### Consumer Spending (Q2, 2024)

**¥ 1,030,664,372,621** **+0.9%**




*Brands and retailers operating in today's dynamic retail landscape face the challenge of optimizing their pricing strategies while ensuring seamless experience for consumers and long-term growth through an omni-channel strategy. As consumer shopping habits continue to evolve, market participants must innovate to stay ahead of the curve and capitalize on emerging opportunities.*

**Lynn Wang, Retail Customer Success Lead, NielsenIQ China**

NIQ and GFK retail market measurements Q2 2024 vs Q2 2023

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**Smartphone market rebounds swiftly while white goods demand lags**

GfK data shows that the sales of T&D consumer goods in China increased slightly by 1.13% year-on-year in Q2 of 2024, which has slowed down compared to the growth of 5.66% in Q1.

The growth of technical consumer goods is stable. After a growth of 8.32% in Q1, it increased by 4.93% year-on-year in Q2. Among them, smartphones occupy a pivotal position in the market with the highest sales amount. With the steady growth and continuous progress of the national economy, coupled with the continuous introduction of new products and new technologies in the market, the smartphone market is gradually leading and stimulating the overall consumer demand from the high-end products. In the first half of 2024, the total sales of the smartphone market broke through 510 billion yuan, achieving a growth of more than 14% compared to the same period last year.

At the same time, the decline in sales of DIY and home improvement-related products is obvious, with a year-on-year drop of 15.97%, and home appliances fell by 8.14% year-on-year. The home improvement and DIY sectors experienced a significant decline, with sales dropping by 15.97% and 8.14% year-over-year, respectively.

The white goods industry encountered some challenges during this year’s 618 promotion period. The total retail volume of refrigeration, washing, and drying in May and June fell by 4%, and the retail sales fell by more than 13%. As the most important promotion for white goods in the first half of the year, the weakness of the mid-year promotion led to a nearly 3% year-on-year decline in retail sales of refrigerator, washing machine, dryer in the first half of the year, with a decline in the average price of each category. However, with the introduction of the national replacement policy in August, it is expected that energy-efficient home appliances will benefit in the second half of the year, driving a slow recovery of the home appliance industry.

At the consumer level, although the current consumer confidence has not been fully restored, and the enthusiasm for consumption is somewhat conservative, the high-end home appliance market has shown a positive growth trend. This is mainly due to the attractiveness of “quality-price ratio” products in the market. According to GfK’s POS data, the retail sales of the refrigerator, washing machine, dryer markets above 10,000 yuan in the first half of the year increased by 1.6% year-on-year, showing a steady growth in the entry-level high-end market. In addition, high-end home appliance products such as built-in refrigerators, large-capacity drum washing machines, and washing and drying machines are driving the positive expansion of the market, indicating that consumer demand for high-quality home appliances is gradually increasing.

“*The recovery of the smartphone market is due to the joint action of multiple factors. First, the performance of entry-level mobile phones has been significantly improved, and the improvement of the user experience has made consumers more inclined to extend the usage cycle of existing devices. Second, the supply chain and manufacturers have shifted their focus to mid-to-high-end products in the past two years, continuously launching technological innovations and iterations, thus promoting the high-end trend of the market. In addition, the rise in the cost of upstream components since the second half of 2023 has also led to an overall increase in the selling price of smartphones. Together, the three major factors drive the continuous upgrade of the unit price of the smartphone market, driving the industry into a positive cycle.*”

**Benedict Hong, Customer Success Lead of GfK China**