

中国消费图景：共探变局中的新机遇

**The Market Consumer in China:
Trends and Opportunities for Convenience Retailers**

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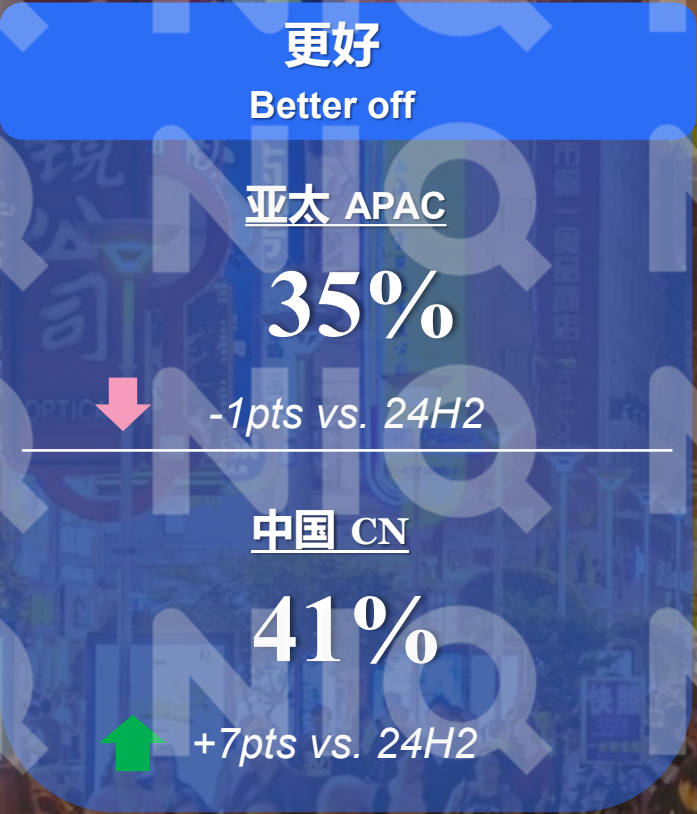
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亚太消费者心态从谨慎保守向理性重构演变

APAC consumer has evolved from cautious conservation towards rational reorientation

▼ 消费者对目前财务状况的感知

Consumer financial position, sentiment year over year (% respondents)



数据来源：尼尔森IQ 2026年中国消费者展望，调研时间：2025年7月 对比2024年7月；样本量=亚太6192/中国1100

Source: NIQ consumer outlook guide to 2026, July 2025 survey data vs. July 2024; Sample size = APAC 6192/CN1100

▼ 消费者主要关注事项 (% 受访者认可)

Consumer top concerns in the next 6 months (% respondents who agree)

	亚太 APAC	中国 CN
Increasing food prices 食品价格上涨	27 1	14
Economic downturn 经济下行	23 2	30 1
Global conflict / crisis 国际冲突/危机	20	9
Self / Family welfare / happiness 自身及家庭福利/幸福感	14	30 2
Increasing utility bills 公用事业费用涨价	14	8
Job security 工作保障	14	20
Global warming / climate change 全球变暖/环境问题	20	9
Increased housing costs 住房成本上涨	9	8
threat of variants 流行病	8	11
Ability to provide basics for family 保障家庭基本/生活能力	8	11
Health threats 健康问题	6	13

对比去年排名变化 Ranking changes vs Y24: ● 上涨Up ● 持平Flat ● 下降Down



亚太地区

理性主导2026消费基调

APAC: Rationality concerns set the intentional spending tone for 2026.

中国

步入“理性”与“情感” 双轨消费新常态

China: Steps Into a New Consumer Norm
Balancing Rational and Emotional Needs

外在需求减少使线下消费动能不足；教育/健康/居家支出提升映射中国消费驱动力转向自我价值的认同

Declining out-of-home and appearance spending weakens offline momentum; Wallet intentions on inner fulfillment reinforce the shift into self-relevance value in China consumption engine

▼ 消费者管理开支的主要策略

Consumers' strategies to manage spending



“值得”成为中国消费的新质驱动力：安全和质量奠基，健康便捷乘势，体验终成归途

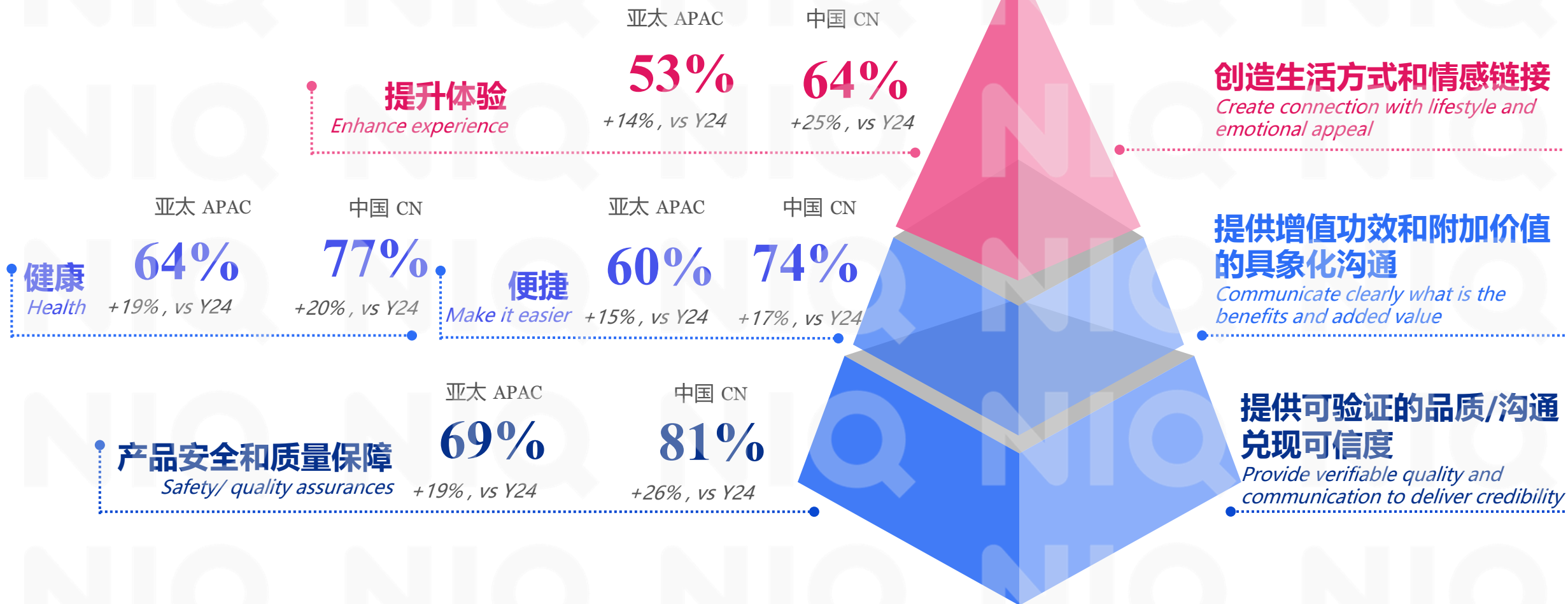
“Worth It” as the new China consumption power: driven by safety/quality, health and convenient oriented, enjoyment experience

▼ 消费者购买日常快消品时考虑的主要因素

Attributes with which consumers willing to pay more

▼ 启示

Implications



中国便利店渠道如何找到**新**消费增量？

Decode New Consumption Growth for China Convenience Retailers

便利店

Convenient Store

全球 Global +1%

亚太 APAC +2%

快消品销售额同比增幅，滚动年25Q3

FMCG Val. Growth MAT 25Q3 vs YA

亚太便利店

领跑整体线下快消品市场，

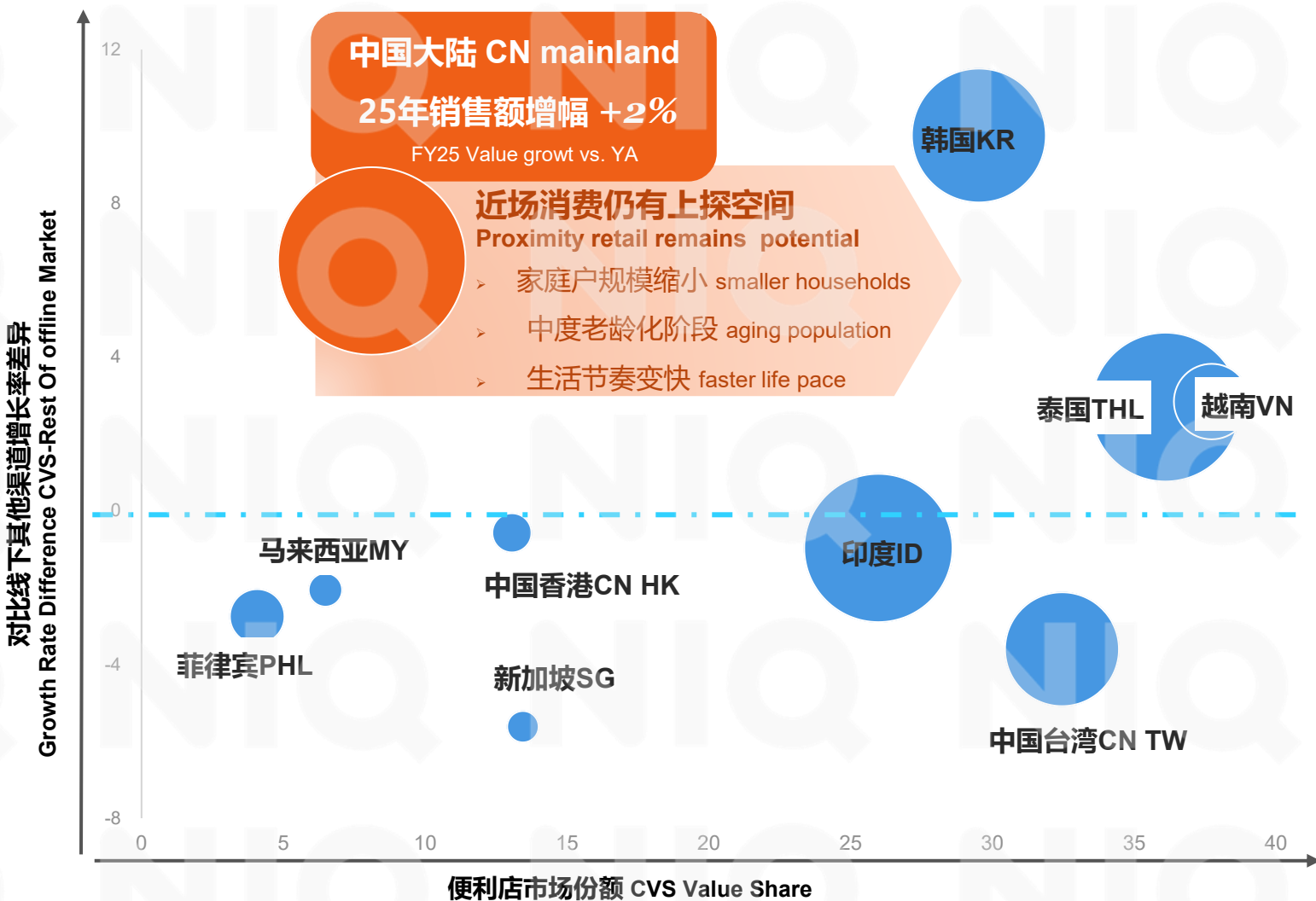
主要受中国、韩国、泰国和越南推动；

但分化态势凸显

In APAC region, CVS continue outperforms the rest of offline FMCG market (-1% vs. YA) driven by CN, KR, THL and VN, but divergence deepens across countries.

中国便利店韧性增长，人口结构变迁下探索结构性机会

China CVS growth stays resilient, while the evolving population structure sets the potential for next growth



数据来源：尼尔森IQ 零售数据监测

Source: NIQ retail measurement

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便利店重构护城河需触达需求本质，“近和快”为本，迈向“需求和情绪即时满足的可靠陪伴”

China convenience store reinvention: go beyond geographic and timesaving availability , shift to reliable companionship destination that provides prompt fulfillment of worth-driven needs and emotional value

便利消费需求正在重构

Consumer demand of convenience is evolving

- 1. 地理便利 Location 
- 2. 省时 Time-saving 
- 3. 休闲购 Leisure shopping 
- 4. 商品力 Assortment 
- 5. 服务与体验 Experience 

贴近感：随想随到
Instant gratification: want now, get now

距离与时间便利：快进快出
Quick in-and-out

多链路及时响应：
触达及场景延申，高效解决方案
Multilink Timely Response ,
Reach and scenario expansion

懂我：灵感补给及创新前哨
My lifestyle front door w/ inspiration ties

功能选品：满足路上所需、紧急补给
Commodity shelf that addressing on-the-go and
emergency make-up demand

追新+悦己：传递生活方式的实质价值
Lifestyle connection by fueling meaningful innovation
and emotional resonance

归属感：生活陪伴的空间
Always-on companion

基础体验：环境明亮洁净，接待有礼
Operational excellence: organized retail space with
basic in-store service

创造停留时间：强化鲜食，融入生活节奏
Lifestyle destination with unified touchpoints :
Ready-to-eat food to anchor pace of daily life

拓店仍是便利店核心增长手段

Store expansion remains the name of the game

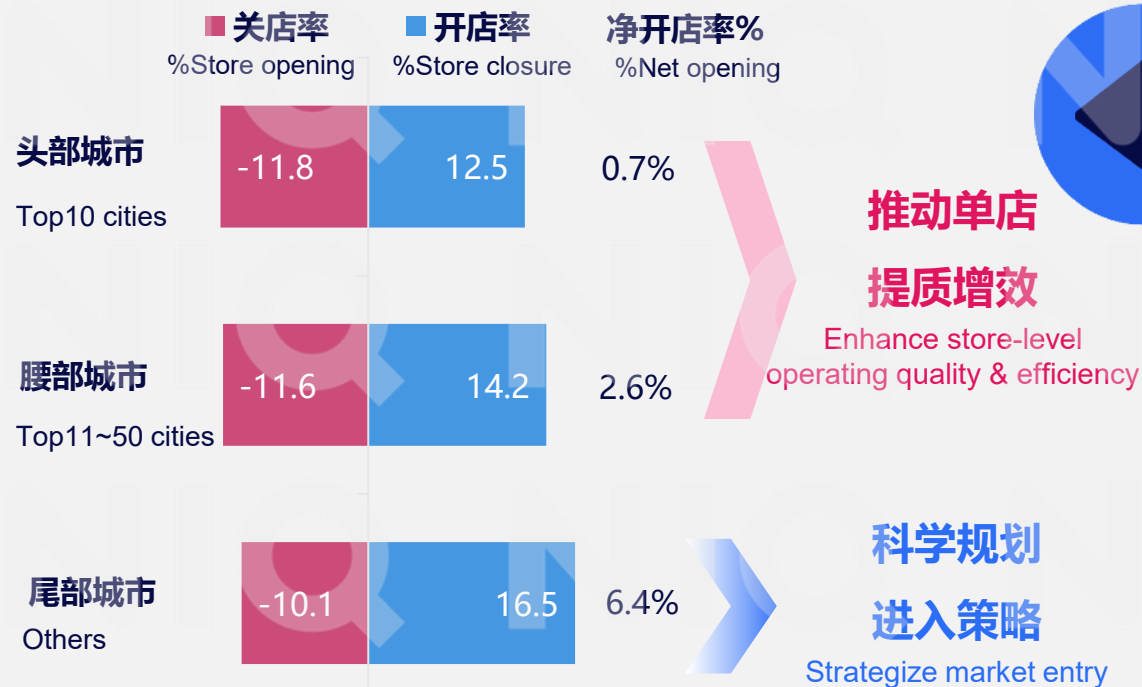
拓张从“粗放”迈向“精耕”

25年门店增速 +5% vs 五年前 +12%

Extensive to intensive expansion: Y25 +5% vs +12% 5YA

便利店渠道开关店情况 滚动年25年6月

CVS store opening/closure change, MAT 2506



城市排名基于滚动年至25年6月快消品66个品类加总的销售额
City group by Descending ranking based on the sum of 66 FMCG category sales, MAT June, 2025

数据来源：尼尔森IQ城市优选，店铺优选，中国便利店渠道
Source: NIQ City priority, Linx, China convenience store

即时零售的崛起进一步扩大传统零售的多点触达

Rising O2O retail extends reach for traditional retailers

1/3

便利店提供24小时
O2O营业服务

CVS offer 24-hour
O2O service

29%

更多使用
便利店外卖配送

Use CVS fast delivery
more often

60%

为更快送达
支付溢价

Pay more for
faster delivery

+24 pts vs Y24

数据来源：尼尔森IQ 2026年中国消费者展望，调研时间：2025年7月 对比2024年7月；？ 样本量=亚太6192/中国1100

Source: NIQ consumer outlook guide to 2026, July 2025 survey data vs. July 2024; Sample size = APAC 6192/CN1100

当“即需即达”遇见“不打烊”，即时零售助推便利店释放全天候的多场景消费活力

O2O unlocks convenience retailers' ability of 24/7 and multi-scenario consumption vitality





产品策略革新

Reshape Assortment Strategy

匹配消费者的情感与理性的核心需求，建立价值观共鸣

Reframe value propositions by balancing core emotional and rational needs

58%

品类驱动中国便利店单店销售额上涨

Categories drive CVS per store growth in China

1

感性需求 *Emotional demands*

向健康需求与情绪共鸣深化转型，便利店成为情感连接的复合空间

Transforming into multi-functional spaces for emotional connection, focusing on health needs and emotional resonance.

2

理性需求 *Rational demands*

场景需求的性价比解决方案；

自有品牌开发因类施策，满足质价比选择

Value-for-money solutions tailored to specific scenarios;

Strategize private label development tactics to meet diverse quality-for-value

数据来源：尼尔森IQ零售核数；依据中国便利店销售额重要性累计85%的快消品类的单店销售表现，更新至滚动年25年9月

Source: NIQ retail measurement data; Per store performance of those categories contributing accumulated top 85% value importance in China convenience store channel, data update to MAT Sept, 2025

从健康安心延伸至情绪共鸣，便利店跃迁为“功能+情感”即时释放的邻里载体

Shaping CVS as the new “functional + emotional” proximity destination fueling by health, enjoyment to identity resonance

▼ 中国便利店单店销售额增幅 China CVS per store sales YOY growth

健康随手买 Buy health anytime

高纤维 High fiber

液体沙拉

Liquid salad

+63.8%

超级食品 Superfood

羽衣甘蓝

果汁/酸奶

Kale juice/yogurt

+217.3%

优选接受度高的成分

Prioritize health ingredients with high acceptance

提供日常轻补的健康方案

Provide daily light supplementation solutions

电解质

运动饮料

Electrolyte sports drinks

+14.1%

维C/维B

功能饮料

Vitamin functional drink

+813.4%

即时小满足 Delight Now

新风味 new flavor

茶味啤酒

Tea beer

+151.5%

新造型 new style

特殊造型

冰淇淋

鸡腿/椰子/榴莲
special style ice-cream

+42.3%

链接猎奇与惊喜的创新

Innovations that spark curiosity and exploration

生活方式的仪式感

Lifestyle-driven ritual experience

小瓶装红酒

(单瓶≤200ml)

Small size wine

+153.6%

一次性酒杯装

葡萄酒

Wine with disposable glass

互动寻共鸣 Identity resonance

经济性+易得性+个性化+社交性

Economic, accessible, personalized and socially engaged

威士忌小酒版

(单瓶5CL)

Mini size whiskey

+345.6%

冰杯

Ice-cup

便利店冰杯消费者

42% 买更多

CVS shopper claimed spend more

DIY混饮基底销售热度高涨

The rise of DIY mixed drinks

进化至更高频场景

Evolving to higher frequency scenarios

杯装火鸡面

Instant turkey noodles

+100.7%

手撕奶酪

Shredded snack cheese

+75.3%

速食料理：创意组合+吃播+沉浸体验

Ready-to-eat creations: interesting mixes + Mukbang + immersive experiences

以性价比响应场景化需求，撬动多品类增量空间

Provide value-for-quality options responding to emerging scenario-based consumptions

中国便利店单店销售表现 China CVS per store sales performance

高频水替需求驱动养生饮料扩容

Healthy beverages booming driven by increasing demand on water alternatives

无糖饮料及养生水

Sugar-free & Chinese new style healthy RTD beverage

+12.6%

Item count growth

+7.5%

Value growth

购买更大包装以获得更划算的单价
larger pack size for better price

20% +2pts

受访者认同比例agreed%

大包装畅饮款，打造性价比

Large-pack strengthen value-for-money perception

畅饮装无糖茶 (≥900ml) Large-pack sugar-free tea

+48%

Item count growth

+20.6%

Value growth

86

价格指数 vs 品类总体
PI vs category total



日常水替

Healthy drinks
played as water alternative

微醺场景促畅饮装酒饮增长

Slightly tipsy enjoyment accelerates the growth of large-pack alcohol

未来一年在酒饮花费更多will spend more on alcohol

25% +9pts

受访者认同比例
agreed respondent%

畅饮装啤酒 (≥900ml) Large-pack beer

+48%

sku

+20.6%

value



微醺时刻

Slightly tipsy
enjoyment

佐酒品类联动增长

Seeing growth in the food categories to accompany alcohol

经济型调味素零食 (PI<100) Economic seasoning snacks

+13%

Item count growth

+13.6%

Value growth

5X

增幅 vs 品类总体
Growth rate vs category

自有品牌以性价比筑基，围绕消费者“质价两全”期待进阶，打造差异化优势

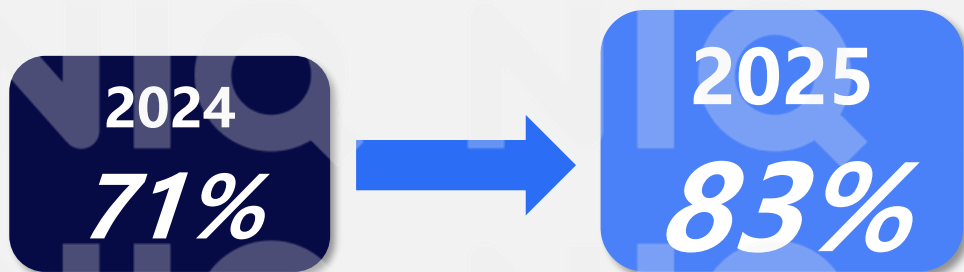
Nurturing differentiated value of private label by balancing quality and cost-effectiveness

自有品牌渗透率及质价比期待提升

Private label fuel by improving penetration and value perception

中国便利店渗透率：过去一年曾经购买 %

China CVS shoppers purchase private label % in P12M



中国便利店购物者选择自有品牌前3驱动因素

TOP3 triggers for China CVS shoppers purchasing private label



“低价吸引”叠加“价值认同”，成长逻辑需因类施策

Value-driven choices at a fair price required systematic strategy

夯实品质基础，提供平价好物

Offer Value-for-money by delivering trusted quality on core function



瞄准重点品类升级方向，满足高质需求

Offer quality-for-money by addressing advanced benefits

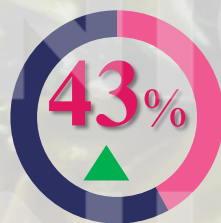


鲜食：围绕健康进化，成分信任切身可知，强化兜底安心感

Ready-To-Eat build reassuring connections, offer advanced health proposition with nutritional benefit emphasis is the key

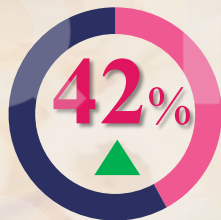
▼ 中国便利店购买鲜食的考虑因素%

Most important shopping preference for ready-to-eat food –CN CVS shopper respondents %



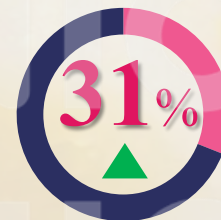
经常查看营养标签

Frequently check nutrition labels



经常控制热量摄入

Regularly control calorie intake



确保摄入足够蔬菜和纤维

Ensure get enough vegetables/fiber

提供优质蛋白和复合碳水搭配，以适配国民体重管理需求

Offer high-quality protein and complex carbohydrates to address growing weight-management demands

提供清晰成分与营养信息沟通，缩短消费者决策链路

Communicate clearly on ingredient and nutrient information to make consumer's decision easier



强调蔬果种类的多样性

Emphasize fiber varieties



加入超级食品

Include super food



尽量少的高脂酱料

Minimize the use of high-fat sauce



使用更优质原料

higher-quality raw materials



非转基因

Non-GMO

解码中国便利店渠道的新机遇

Decode New Consumption Growth for China Convenience Retailers

关键趋势 Key takeaway:

 覆盖与触达深化仍是构建“贴近感”的硬增量。

Coverage and reach expansion remains a crucial foundation in driving “proximity to me”.

 消费者价值重排，“与我相关”成为增长的确定性；
消费动能从满足功能，升格为“懂我”。

Reframe value proposition with “relevance to me”. Consumption power shifts from “functional benefits” to “self-rewarding”.

 渠道升维以回应新型便利价值期待，从产品买卖，转向承载情绪即时释放的邻里空间。

Channel reinvention responding to the redefined convenience proposition. Beyond selling products, evolve into proximity destination of everyday emotional ties.

乘势而上 The way forward:

 拓店精耕与即时零售双轮驱动实现全域触达，最大化“即想、即得”的响应竞争力。

Strengthen competitiveness on “want now, get now”, fueling by store expansion with operational excellence and quick commerce.

 围绕健康、尝新探索、悦己革新商品力，以质价比自有品牌及鲜食形成差异化供给，提效需求响应能力，三股合力形成新增长动能

Reshape assortment strategy: health, innovations and inner fulfillment, quality-for-money private labels and ready-to eat foods agile demand respond capability.

 将价值承诺贯穿生活方式，融合场景体验和服务，令情绪连接在店内切身可知，实现高频陪伴

Integrate into daily lifestyle, combining them with scene experiences and services, emotional connections can be tangibly felt in store.

联系我们

