

价质跃迁 共赴新境

Quality-Price Leapfrogging: Embarking on a New Frontier

中国快消自有品牌价值进阶之路

China FMCG Private Labels: The Journey to Value Elevation

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中国消费者的家庭财务预期有限好转

消费心态从“谨慎保守”向“理性”与“情感”并重的双轨制重构演变

Chinese consumer has evolved from cautious conservation towards rational & emotional reorientation

消费者对目前财务状况的感知

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

更好

Better off

亚太 APAC

35%

↓ -1pts vs. 24H2

中国 CN

41%

↑ +7pts vs. 24H2

更差

Worse Off

亚太 APAC

29%

↑ +2pts vs. 24H2

中国 CN

23%

↓ -1pts vs. 24H2

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)

食品价格上涨
经济下行
国际冲突/危机
自身及家庭福利/幸福感
公用事业费用涨价
工作保障
全球变暖/环境问题
住房成本上涨
流行病
保障家庭基本/生活能力
健康问题

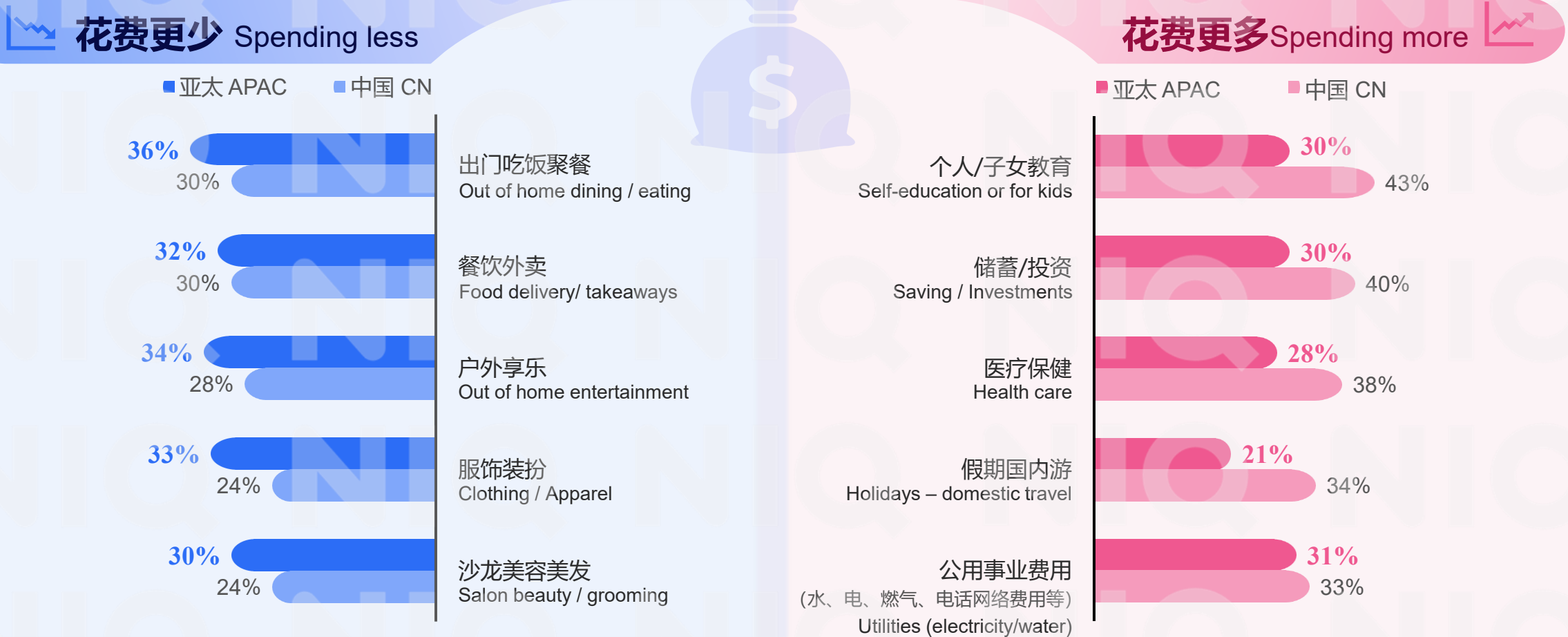
亚太 APAC	中国 CN
27 1	14
23 2	30 1
20	9
14	30 2
14	8
14	20
20	9
9	8
8	11
8	11
6	13

对比去年排名变化： 上涨Up 持平Flat 下降Down

双轨消费主导下，中国消费者的物质价值观重排，消费驱动力逐渐从外部认同转向自我及家庭的身心满足

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



体现在快消品购买上, 中国消费者左手要抓“物质森林”, 右手要享“情绪旷野” 质价比与情感共鸣的双重满足将成未来快消发展趋势

Reflected in FMCG purchases, Chinese consumers demand both functionality and emotional appeal. The dual delivery of value for quality-price ratio and emotional resonance will define future FMCG trends.

▼ 消费者购买日常快消品时的支出偏好

Top1 **29%** ● 评估并优先排序最重要的商品属性
质价平衡
亚太: 28%

Top2 **26%** ● 大促时囤货喜欢的品牌
质价平衡
亚太: 25%

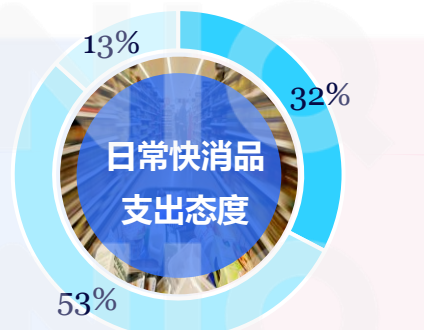
亚太
APAC

● 切换至低价渠道进行购买
中国: 22% 价低优先

● 切换购买低价品牌
中国: 18% 价低优先

32% Top1

29% Top2



■ 花费更多 ■ 花费维持 ■ 花费更少

中国
China

▼ 消费者愿意溢价支付的快消品属性

64% 体验

vs 53% 亚太
提升外出或宅家的体验

77% 健康

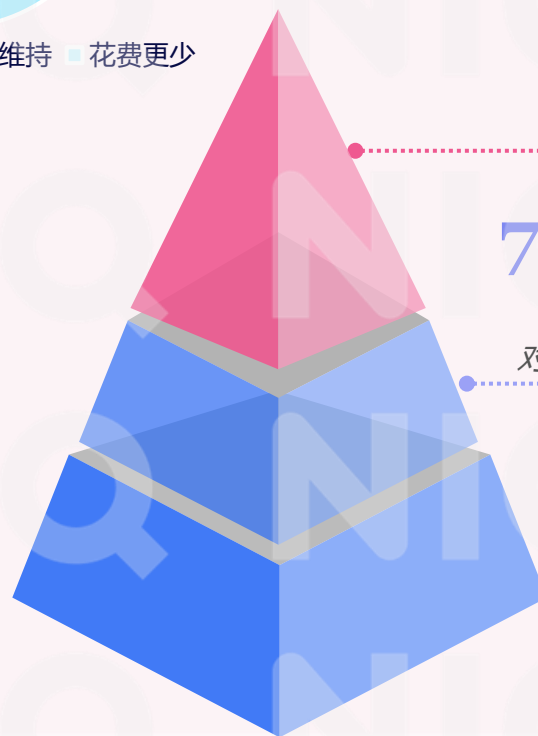
vs 64% 亚太
对健康更有益的产品

74% 便捷

vs 60% 亚太
更便捷的产品形式

81% 安全 and 质量

vs 61% 亚太
产品安全 and 质量有保障



中国消费者在自有商品的选购上,也正从由低价吸引转向价值追求 自有品牌的质价跃迁之旅已然开启

In the selection of private label products, Chinese consumers are shifting from low-price appeal to value-driven pursuit. The journey of quality-price elevation for private labels has officially commenced

▼ 消费者购买自有品牌产品的原因



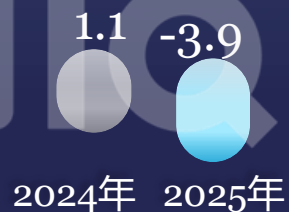
中国自有品牌规模快速崛起, 与厂商品牌间的价格差距逐渐弥合

NIQ

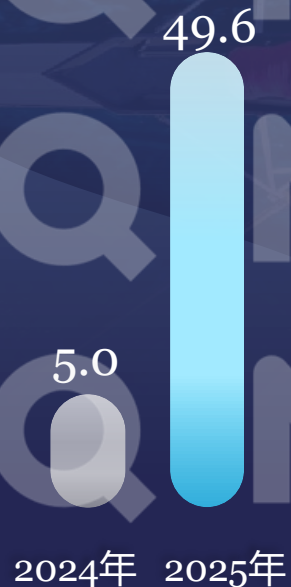
China's private labels are rising rapidly in scale, and the price gap with national brands is gradually narrowing

▼ 中国线下市场自有品牌vs厂商品牌销售量增长率%

厂商品牌



自有品牌



自有品牌均价
比厂商品牌
低

20%

2024年

VS

13%

2025年

各品类自有品牌增长模式差异

多数量增品类开始向品质化、差异化方向发展

Private label growth strategies differ by category. Categories that previously relied on volume growth shifts toward premiumization and differentiation.



自有品牌价质跃迁四要素

Four Elements Driving Private Label Evolution



品质升级

Quality Upgrade



情绪共鸣

Emotional Resonance



创新吸引

Innovative Appeal



品牌建设

Brand Equity

以品质细分为抓手，构建零售商高质价比价值供给

By utilizing quality segmentation as a strategic tool, retailers can establish a supply chain that delivers superior quality at competitive prices



风干牛肉
中式肉类零食



低芥酸
小包装食用油



青柑普洱
即饮茶



高蛋白
液体奶



以情绪共鸣为目标, 调和产品“功能+情感”, 寻求与双轨消费观的价值同频

Targeting emotional resonance: Balancing function and emotion to sync with dual-track consumer values

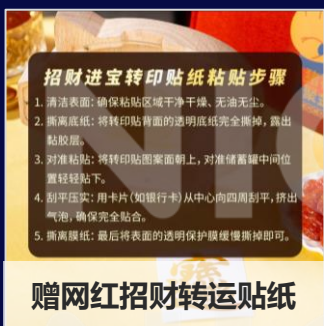
供给外部能量

爆辣到极致, 显社交属性



产品功能
香辣口感
情感载体
四椒爆辣
情感表达
热场神器

送暴富礼盒, 招财你我他



产品功能
咸香零食
情感载体
招财贴纸
情感表达
全员暴富

共鸣内心呐喊

生活好眠难, 期盼优质眠



产品功能
营养乳品
情感载体
GABA菌株
情感表达
高质睡眠

寻气味记忆, 诉思乡心切



产品功能
洗衣留香
情感载体
春节限定
情感表达
家乡味道

深耕自身产品创新能力，以创新力为基，打造差异化竞争壁垒

Deepen product innovation capabilities, and leverage innovation as the foundation to build differentiated competitive barriers

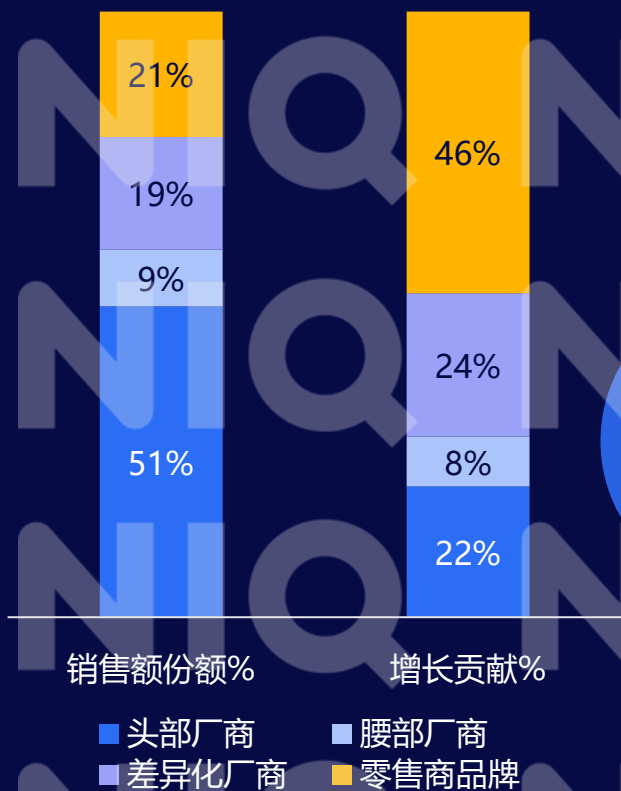


以品牌建设为纲，构建零供协作新模式，为可持续增长蓄能

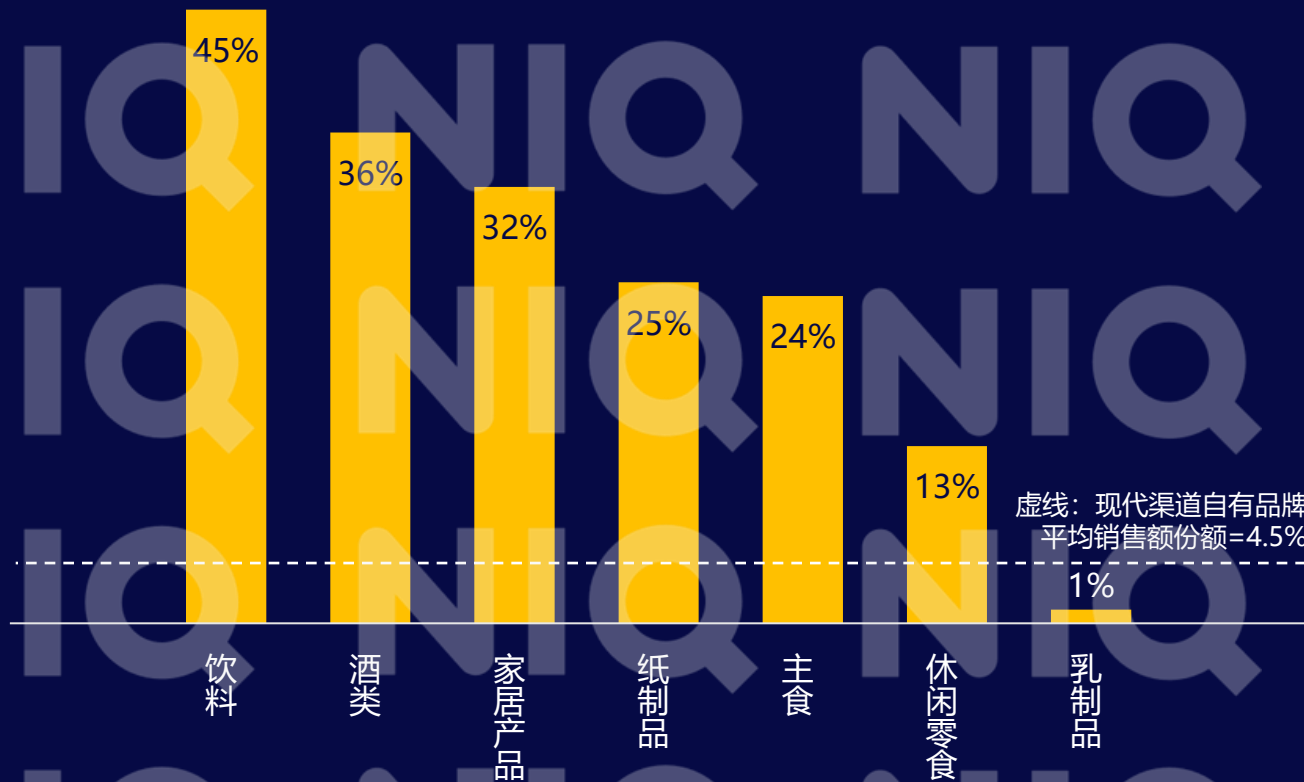
Championing brand building as the guiding principle to establish a new model of retailer-supplier collaboration and accumulate momentum for sustainable growth

成功店 | 快消品各厂商销售额份额%及额增长贡献%

厂商定位参考全国线下同期各品类中销售额排名划分：
 头部厂商：TOP10
 腰部厂商：TOP11-30
 差异化厂商：其他厂商（除零售商品牌）



成功店 | 各品类中自有品牌销售额份额%



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- ✓ 以品质细分为抓手契合质价比升级

Leveraging Quality Segmentation to Match Quality-Price Upgrades

- ✓ 以情绪共鸣为目标寻求双轨消费观同频

Targeting Emotional Resonance to Align with Dual-Track Consumption Values

- ✓ 以深化创新能力为基打造差异化竞争壁垒

Grounded in Deepened Innovation Capabilities to Build Competitive Barriers

- ✓ 以品牌建设为纲为可持续增长蓄能

Guided by Brand Building to Accumulate Momentum for Sustainable Growth