

价质跃迁 聚力前行

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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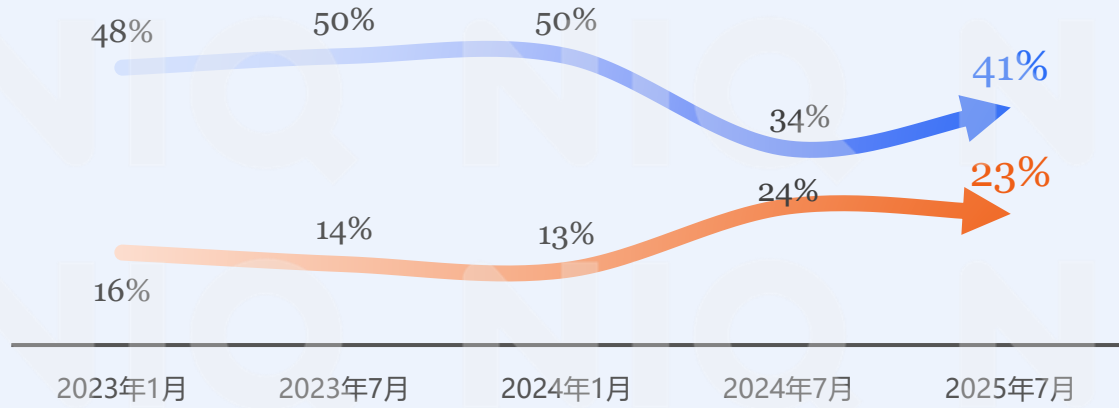
消费心态从“谨慎保守”向“理性”与“情感”并重的双轨制重构演变

Chinese consumer has evolved from cautious conservation towards rational & emotional reorientation; The dual delivery of value for quality-price ratio and emotional resonance will define future FMCG trends.

家庭财务预期有限好转, 理性与情感并重的双轨消费将成主流

中国消费者对家庭财务状况的感知

➡ 更差 ➡ 更好

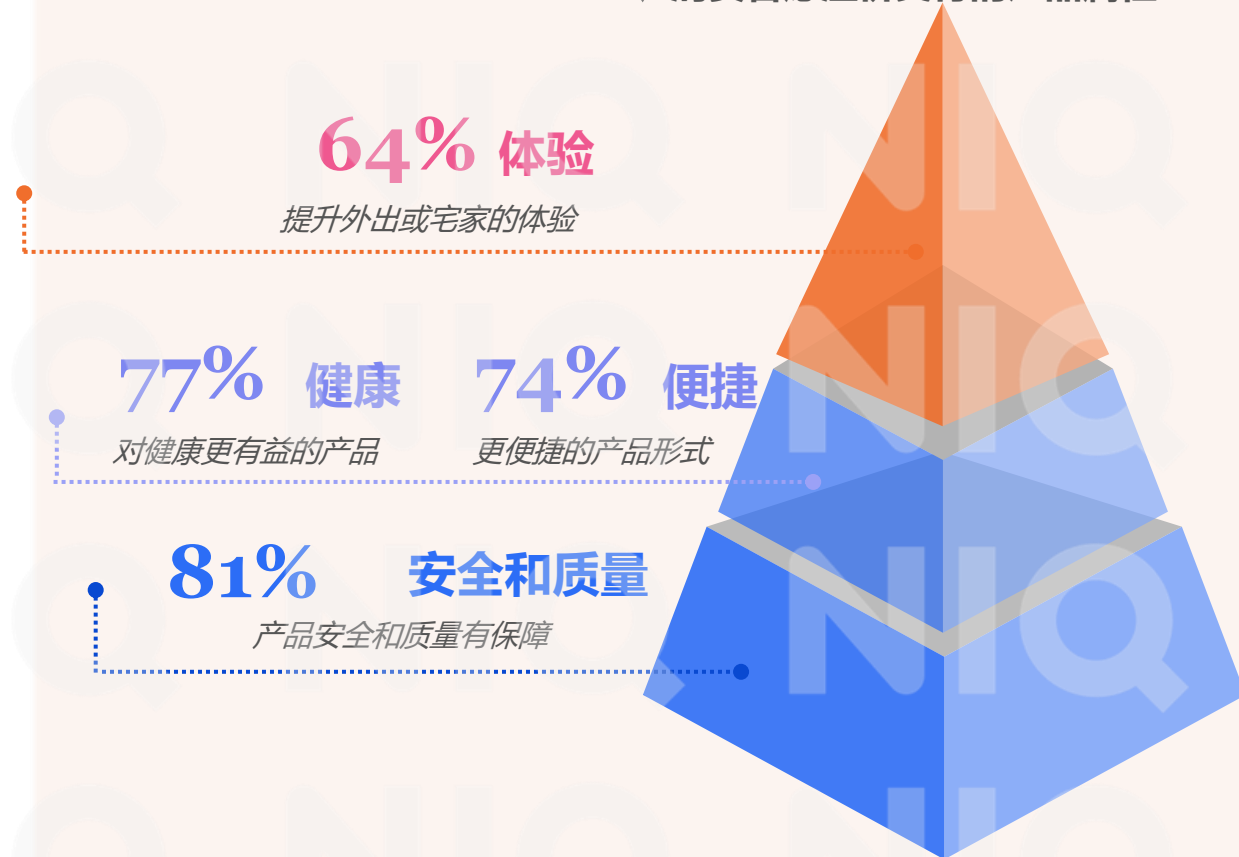


中国消费者当前主要关心的事项



体现在快消品购买上, 消费者左脑要功能满足, 右脑要情绪体验

消费者愿溢价支付的产品属性



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 自有品牌的价质跃迁之旅已然开启

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

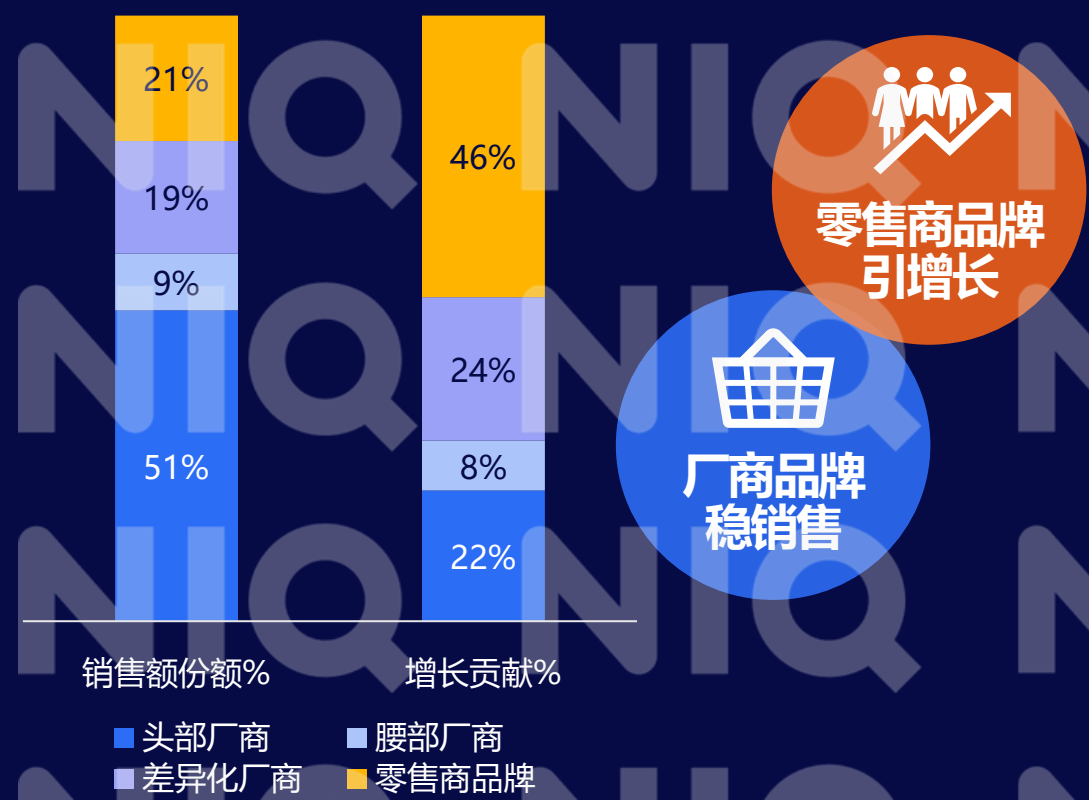


先进的商品策略下，零售商品牌与厂商品牌正在构建新型协作模式，为可持续增长蓄能

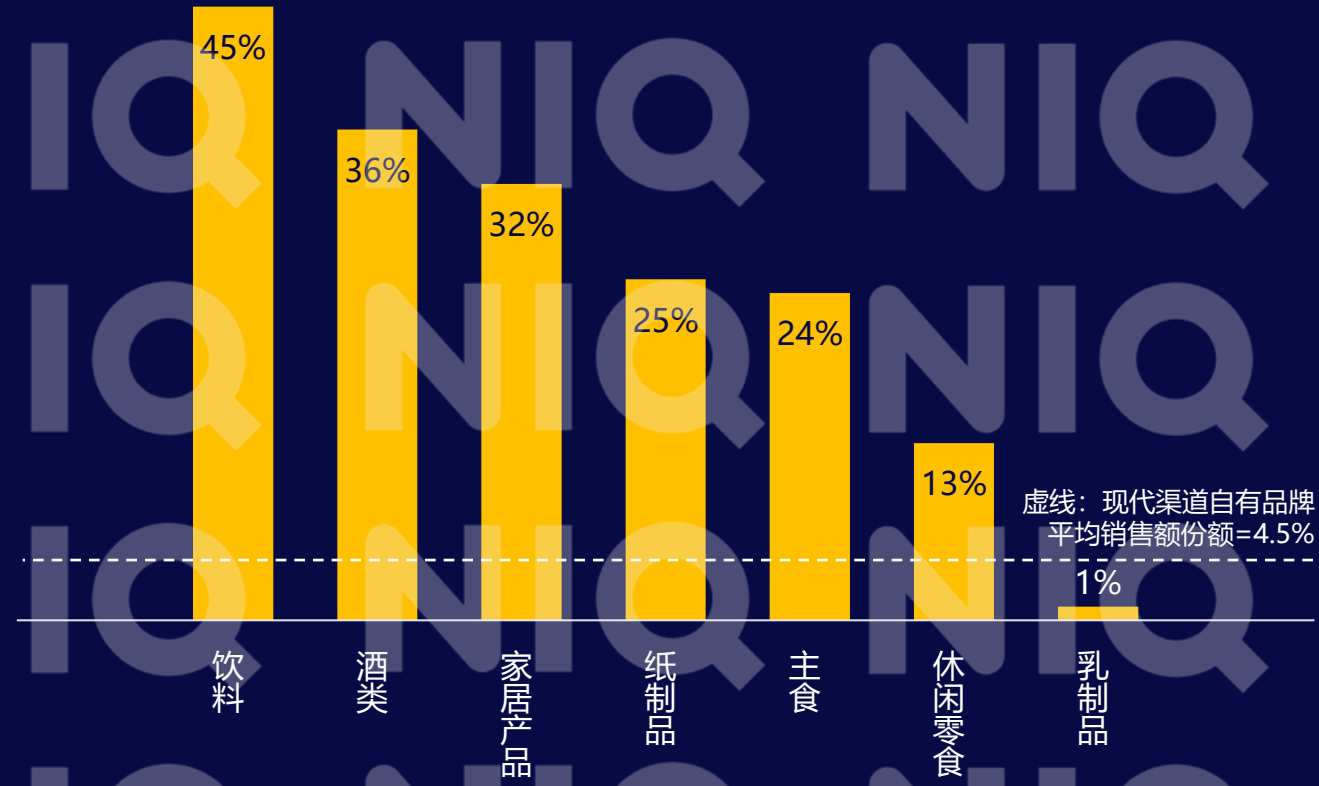
With smart merchandising, retailer and manufacturer brands are reshaping collaboration to power long-term growth

调改成功店* | 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）



调改成功店 | 各品类中自有品牌销售额份额%



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中国快消自有品牌

价质跃迁 聚力前行

消费者

从平价替代到品质信赖
心智认同发生质变

零售商

从商品复制到品牌塑造
渠道资源重点倾斜

品牌商

从零和博弈到联合协作
价值投入持续加码



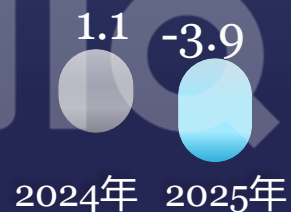
中国自有品牌规模快速崛起, 与厂商品牌间的价格差距逐渐弥合

NIQ

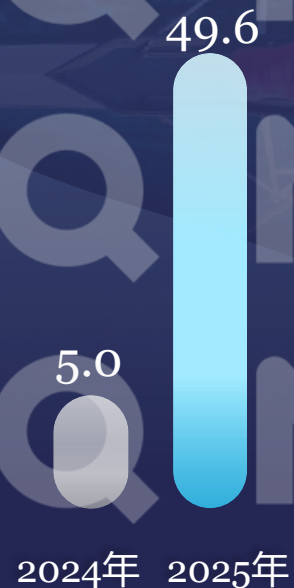
China's private labels are rising rapidly in scale, and the price gap with national brands is gradually narrowing

▼ 中国线下市场自有品牌vs厂商品牌销售量增长率%

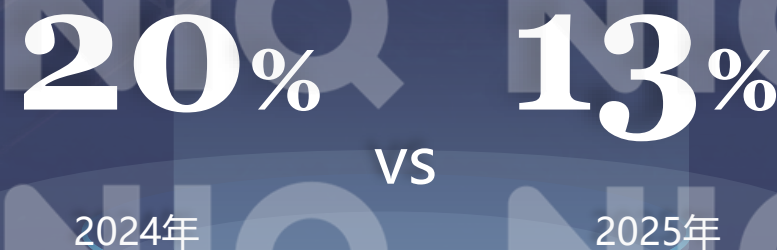
厂商品牌



自有品牌



自有品牌均价
比厂商品牌
低



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.



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



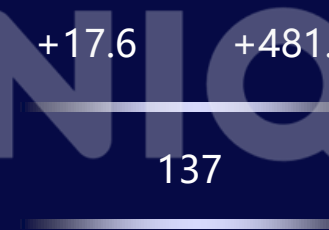
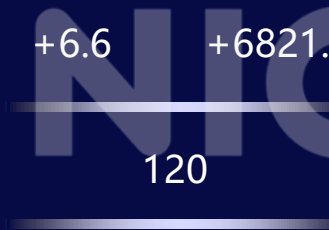
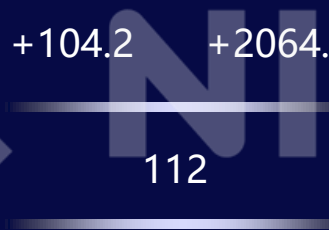
低芥酸
小包装食用油



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

原料 创新



银鲈鱼
(中式肉类零食)



大米
(酸奶/酸味奶)

口味 创新



海盐太妃巴旦木味
(干脆小食)



参鸡汤味
(中式粉面)

工艺 创新



微胶囊工艺
(洗衣剂)



非均质工艺
(液体奶)

因地制宜，顺势把握自有品牌质、价增长机遇

Leverage market trends to seize growth opportunities in private brand's quality and pricing



零售商品牌



厂商品牌



均价
增幅

+5.4%

+5.0%

+5.1%

-2.0%

-0.5%

-0.7%

-0.7%

-3.0%

销量
占比

16.1

30.0

26.9

26.9

10.0

18.6

23.0

48.3

重点城市

省会城市

地级市

县乡镇

重点城市

省会城市

地级市

县乡镇

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China FMCG Private Labels: The Journey to Value Elevation

- ✓ **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

- ✓ **因地制宜，顺势把握自有品牌质、价增长机遇**

Leverage market trends to seize growth opportunities in private brand's quality and pricing